



## **Third Party Event Policy & Procedures**

### **Policy:**

Sunbeam Centre encourages support from the community and individuals to aid in the financial wellbeing of Sunbeam so it can most effectively act on their behalf to live out its vision and mission. All Third Party (hosted by members of the community) fundraising efforts will be in compliance with Canada Revenue Agency guidelines, and any legal and ethical best practices for organizations. Furthermore, all Third Party fundraising efforts will follow all Sunbeam Centre's applicable policies and procedures.

The following procedures outline the steps of initiating a Third Party Event. These documents are intended to clarify roles and responsibilities between you, the Third Party Organizer, and Sunbeam Centre.

### **Links to the following forms:**

- **Third Party Fundraising Application**
- **Third Party Event Agreement**

### **Procedures:**

1. Read through all three forms to ensure your event matches with Sunbeam Centre's approach to Third Party Fundraising. Please complete the fillable online form, Third Party Fundraising Application, and/or print it out and email it to [fundraising@sunbeamcentre.com](mailto:fundraising@sunbeamcentre.com). This form must be received a minimum of 6 weeks (45 days) before your event. The more planning time, the better the results.
2. The application is reviewed and approved by Sunbeam. Approval will be in the form of an email to the contact person listed on the application. A Third Party Agreement needs to be signed and submitted.
3. Once the signed agreement has been received a meeting will be arranged to discuss:
  - a. Any marketing/promotional items that will be needed
  - b. Determine any reporting/communication expectations for the project
  - c. Eligibility for tax receipts (Provide CRA link)
4. Determine if your event requires a license. Sunbeam Centre is not responsible for licences for any third party events.
5. Verify Alcohol & Gambling Rules – Contact your municipality for requirements and provide your findings to Sunbeam's Director of Fundraising. Once applications have been approved provide copies to the Director of Fundraising. Obtain insurance for your event. Copies of licences and insurance must be submitted to Sunbeam at least 30 business days before the event.
6. Obtain the proper pledge cards and/or tax receipt forms from Sunbeam at least 10 business days in advance of your event.
7. On the day of the event, communicate appropriately with the Sunbeam Staff member or volunteer assigned to your event.
8. Final reporting submitted to Director of Fundraising within 15 days of the event

- a. Full report of income and expenditures
  - b. All donor information
9. Provide/present proceeds from the event to Sunbeam (within 30 days of the event).