



Personal Fundraising Events Frequently Asked Question's

Introduction

Thank you for your support of the Friends For Life Bike Rally (Bike Rally) and Toronto People With AIDS Foundation (PWA).

We realize that reaching the \$2,200 fundraising minimum required to participate in the Bike Rally may seem challenging but holding a Personal Fundraising Event can be a fun and easy way to help you reach that goal. We are here to help you achieve that and support you in planning your event.

All Bike Rally Personal Fundraising Events are considered 3rd Party Events on behalf of PWA and, as such, need to be reviewed and approved by PWA and the Bike Rally to ensure all policies are followed and PWA and the Bike Rally are properly represented.

We have developed answers to a number of frequently asked questions about Personal Fundraising Events. Please read the sections that apply to your type of event, and if you can't find the answer to your question, please contact the Special Events Coordinator at PWA so we can assist you and also improve this resource for others.

The Bike Rally and PWA can provide the following assistance once your event has been approved:

- Advice and expertise on event planning and ideas to help you plan and run a successful event
- Bike Rally supplies for your event (e.g. posters, brochures, banners and/or signage)
- Approval of Bike Rally and/or PWA name/logo
- Support letter that validates the authenticity of the event

The Friends for Life Bike Rally cannot provide the following:

- Funding or reimbursement for event expenses
- Mail/e-mail lists such as donor, participant or client lists
- Promotion or advertising of your event
- Guaranteed attendance of staff or volunteers at your event
- Application for gaming licenses, e.g., bingos or raffles
- Access to celebrities or VIP's
- Prizes, auction items, awards

GENERAL EVENT QUESTIONS

Why do I have to complete the Personal Fundraising Event application form?

The information in the application form provides us with details about your event, our involvement with your event and helps us determine what you are looking for from us and how we may best support you. It also allows us to track all Personal Fundraising Events organized by Bike Rally participants and ensures you are not in conflict with any existing Bike Rally or PWA events.

I have some event ideas. Is there help available in pulling everything together?

We can provide suggestions and guidance to you as you plan your event.

Can you find a venue for my event?

We do not have the resources to assist you in finding a venue for your event. There are many great resources online to assist you or you can ask your own personal contacts for suggestions.

Can you find sponsors for our event?

Due to our small staff team and limited resources, we are not resourced to approach companies on your behalf. We have found that committees can have a tremendous amount of success securing sponsors by using personal and local connections. We can, however, assist you in brainstorming what types of companies may be a good fit for your event and can provide you with tips that can help you approach and secure sponsors.

Can I approach Friends for Life Bike Rally sponsors or PWA Agency partners for support?

Our sponsors and partners are already committed to helping us through their current agreement. Participants should not approach any official Bike Rally sponsors without first contacting PWA's Director, Development & Communications. You will likely have the most success by approaching other businesses local to your community, and by using the personal connections you and your committee might have.

What is the difference between a sponsorship and a donation?

Sponsorship is a cash or in-kind free product or service donation given to an organization or group in return for access to the commercial/publicity potential associated with that organization and/or event. The strategy is to build a link in the target audience's mind between the sponsor and a highly valued organization (or event) to win consumers and/or key accounts. The benefit of sponsorships to a charitable organization is that they often help offset event and administration-related expenses, freeing up more money to be directed to the cause. In contrast, a monetary donation to a charity is usually made without any benefit to the donor other than a feeling of having given to a good cause. Sponsorships are not tax receiptable. Please contact us if you have any questions about this topic.

How do I get current Bike Rally and PWA information to distribute at my event?

Once your event has been approved by us, we would be happy to arrange event supplies including brochures, posters, banners, signage and pledge cards & envelopes.

Are there audiovisual resources available to show at my event?

We are pleased to be able to loan you a copy of our A Reason To Ride – The Story of the Friends For Life Bike Rally DVD for you to show at your event. It is available in DVD format only. We hope you will find it a fitting testament to your support of the Bike Rally. There are also numerous short videos available through bikerally.org or YouTube.com.

Can someone from the Bike Rally Steering Committee or PWA speak at my event or staff an information table?

We are not resourced to send a representative to every event. The decision to send a speaker is based on the location, size and fundraising potential of the event and is at the sole discretion of the Bike Rally and PWA. Please feel free to contact the PWA Special Events Coordinator to discuss.

Can you provide volunteers for my event?

We are not resourced to provide volunteers for every event - the decision to send volunteers will be based on the location, size and fundraising potential of the event and is at the sole discretion of the Bike Rally and PWA. To inquire about volunteers please email the Bike Rally Recruitment Committee at iwant2ride@bikerally.org. If you are looking for volunteers, you could ask friends and family – undoubtedly they will want to support your initiatives! Also, you could ask for volunteers from your local high school: high school students often require community service hours.

How can you help me thank and recognize the many people who make my event possible, including my committee, event sponsors, contributors and participants?

We are able to provide you with a thank you letter template that you can use to recognize the people involved in your event. If you choose to thank your participants in another way and would like to use the Biker Rally or PWA logos please contact the PWA Development Department directly.

LEGAL QUESTIONS

What are the legal constraints or considerations I need to know when planning, promoting and holding my own fundraising event?

For questions related to legal considerations and a full list of policies for Bike Rally Personal Fundraising Events, please refer to the Friends For Life Bike Rally – Personal Fundraising Event Policies document. This document addresses tax receipts, charitable gaming, insurance, alcohol involvement and name and logo usage.

What if I have insurance questions?

If you are hosting an event that requires insurance, it is best to contact the PWA Development Department as they can help you learn more about this. For example, for certain types of activities, obtaining signed waivers prior to your event might help protect you from liability, or it could be a PWA requirement to have a waiver. If you are hosting an event in your home, most often your personal homeowner's insurance will cover it. Please contact your insurance agent for more details.

What should I know if I intend to have alcohol at my event?

To ensure the venue you are working with has been fully licensed by the Liquor Control Board of Ontario, we may ask you for their liquor license number or a copy of the license, which is public information. This information tells us that the servers have been Smart Serve trained/licensed and will be able to ensure that no guest will be over-served preventing any health, safety or legal risks. If the event is to be in your home, please be advised that your personal homeowner's insurance would apply – please contact your insurance agent for more details.

PWA will not apply for liquor licenses (or special occasion permits) on behalf of Third Party event organizers as we are not able to accept liability.

FINANCIAL QUESTIONS

What if I have event expenses to pay for?

Under no circumstances will the Bike Rally or PWA cover any event expenses. The best way to cover out-of-pocket event expenses is to add a revenue stream where the funds raised are not eligible for tax receipts – like a cover charge, auction proceeds, or donation tins. For example, if you charge a \$10 cover for a party, these funds can be used to cover expenses such as food and decorating supplies. All receipted monetary donations should be made payable to PWA and cannot be used for expenses.

Can I fundraise online?

A participant's On-line Pledge Page is to be used for the solicitation of donations only. Participants cannot use their On-line Pledge Page to promote or sell tickets to their events or draws.

For larger event ticket sales not eligible for tax receipts, PWA may be able to offer a separate purchasing page in Artez. Please note we are unable to offer this option to all events due to set-up expenses and limited staff resources and it is done at the sole discretion of the Bike Rally and PWA.

Can a Group or Team hold a fundraiser together?

Holding a group fundraiser is a great way to raise funds and share the workload of organizing an event. If your event is a group event and benefiting more one than one Bike Rally participant please submit to PWA a breakdown of how the revenue is be allocated to each participant so we can properly update each participant's fundraising.

Can you tell me more about tax receipts?

PWA's tax receipt policy is based on the federal Income Tax Act which is enforced by the Canada Revenue Agency (CRA). PWA must comply with this legislation to maintain its charitable status and ability to issue charitable receipts.

PWA's tax receipt policy specifies the circumstances in which tax receipts may be issued and the kinds of contributions that are eligible for tax receipts (and is based on regulations set out by CRA). For example, if a donor receives a right, privilege, benefit, or advantage of any kind from a contribution to a charity, the donation is ineligible for a tax receipt. In accordance with our policy, PWA has full control over the issuing of tax receipts and therefore reviews and approves any event-related tax receipt issues in advance of the event to ensure conformity with CRA regulations and our policies. Please contact us before guaranteeing tax receipts to anyone attending or contributing to your event.

Are all monetary donations eligible for tax receipts?

Any straight monetary contribution to PWA with no benefit to the donor is eligible for a tax receipt. For administrative purposes, it is our practice to automatically issue tax receipts for donations of \$20 or more. Tax receipts are available, upon request, for donations under \$20. Cheques should be made payable to Toronto People With AIDS Foundation. To be included as part of your Bike Rally Fundraising, all funds and donor contact information must be received by PWA by July 1.

Can I issue tax receipts right at the event?

To ensure PWA is in full compliance with the Income Tax Act, and for us to ensure we have the most accurate records, PWA issues all tax receipts from their offices only.

What if one of our participants lost their tax receipt or if there is a mistake in it?

Please contact the PWA Special Event Coordinator at 416-506-1400 ext. 238 who can arrange to either issue a duplicate tax receipt or correct it if a mistake has been made.

Can I have my tax receipt sent to someone else?

The Income Tax Act obligates us to send receipts only to the person or organization that made the donation. This means that unless we receive signed documentation that a person gave you the money to forward to PWA, we can only send a receipt to the person or people whose names are on a pre-printed cheque, the person who signed the money order, the person whose name is on the credit card, or the donor listed on the donation card/form.

I'm making the donation in lieu of a gift. Can you send the receipt to that person?

We would be happy to send a card to someone indicating your gift in their honour/memory. The Income Tax Act requires us to issue the receipt to the person making the donation, and we are therefore unable to issue a receipt to the person you are honouring.

I'm writing the cheque, but can I have the receipt sent to my partner?

If your cheque is pre-printed with more than one name, we can send the receipt to any name on the cheque. If your partner's name is not on the cheque, we cannot and you should check with the Canada Revenue Agency about sharing your tax credit with your partner when you file your income tax returns.

I want to write a cheque or use my credit card to cover cash donations I collected for the Foundation. How can the people who donated cash get a receipt?

In order for individuals who donated cash to receive a tax receipt, we need to receive donation cards or forms completed by each donor with their full contact information and the amount of the donation.

What about merchandise purchased in support of the Bike Rally or PWA or items purchased at an auction? Are they eligible for a tax receipt?

Purchased items, including auction items, are not eligible for tax receipts as the purchaser is receiving something in return for their money.

Are ticket and admission prices, green fees, etc. eligible for a tax receipt?

The Canada Revenue Agency states that tax receipts cannot be issued when the individual is receiving something in return. Tickets sold for an event where the purchaser receives a benefit (i.e. attending a spinning class, concert, dinner or sporting event) are not eligible for tax receipts. Participants cannot use their on-line pledge page to promote or sell tickets to such events.

Are in-kind donations eligible for tax receipts?

PWA does not issue tax receipts for in-kind donations to Bike Rally Personal Fundraising Events, including items donated to auctions, due to extensive administration that would be required by PWA to process each in-kind gift. It is important to know that it is more advantageous for a company to deduct the original cost of the inventory as a business expense, including donated auction items. PWA will, however, provide your in-kind donors with a letter of acknowledgment when requested.

Are corporate sponsorships eligible for tax receipts?

Sponsorships are viewed by the Canada Revenue Agency as a business agreement providing commercial benefit to the sponsoring organization and are therefore ineligible for tax receipts. PWA can provide your event sponsors with a letter of acknowledgment or business receipt when requested.

Are sponsorships of golf holes eligible for tax receipts?

If a company decides to sponsor a hole in a golf event, they are not eligible for a tax receipt because, by placing their name on the hole, they are receiving marketing value and a promotional opportunity and the Canada Revenue Agency states that tax receipts cannot be issued when the individual or business is receiving something in return. It is often helpful to provide them with a thank you stating the amount they paid to sponsor the hole which they can use to justify the

expense in their accounting. If an individual would like to support your event, it is in their best interest to make a personal donation if they want to receive a tax receipt.

Are donated services eligible for tax receipts?

The Canada Revenue Agency states that donated services are ineligible for tax receipts.

Other charitable organizations handle tax receipting inquiries differently than PWA. Are they doing something wrong? Why are there differences?

PWA's tax receipt decisions are based on the Canada Revenue Agency's Income Tax Act (ITA) and advice from our auditors. Many sections of the ITA are subject to interpretation and we cannot speak to other charity practices.

Who do I speak with at the Foundation to discuss tax receipts?

For more information about tax receipt issues, please contact the PWA Special Events Coordinator at 416-506-1400 ext. 238.

EVENT PROMOTION QUESTIONS

Can you help me promote my event?

The Bike Rally Media Committee will be pleased to include your event on the Bike Rally Upcoming Events Calendar on the Bike Rally website – www.bikerally.org

What is the process I need to follow to use the Foundation name and logo in promoting my event?

Once your event is approved, we would be happy to provide you with copies of the Friends for Life Bike Rally and PWA logos. To ensure proper use of our name and logo, the Bike Rally Media Committee and PWA must see all material you are planning to produce prior to its printing and distribution. This applies to all materials, including websites, that pertain to your event and all mentions the Friends for Life Bike Rally and/or PWA name and/or uses of the logo(s). Please note that we need to approve the Bike Rally and PWA's name and/or logo(s) each and every time they are used before production or distribution. Approval from us gives you the right to use our names and logos only as it relates to your event and specifically approved materials. This right cannot be assigned or transferred, can only be extended with written permission from PWA, and must be renewed each time an event is held.

OTHER QUESTIONS

GAMING

What is charitable gaming? The Alcohol and Gaming Commission of Ontario (AGCO) controls all charitable gaming and has a number of regulations with which PWA, individuals and your event must comply. The term "charitable gaming" refers to lottery schemes permitted by a license under the Criminal Code of Canada. Typically these include bingos, raffles, break-open tickets, 50/50 draws and Monte Carlo events held by charitable organizations. The rule of thumb is that any time

you are selling a chance to win; it would be considered charitable gaming and would therefore require a gaming license. For more information on the Alcohol and Gaming Commission of Ontario please visit their website at www.agco.on.ca.

Is poker considered charitable gaming?

The Alcohol and Gaming Commission of Ontario will not issue licenses for any charitable poker events. Therefore, at this time we are not able to approve any poker events that involve winning any item or monetary prize.

What other ways can I use prizing for my event?

We recommend to event organizers that they consider holding an auction or door prize draw with items they have secured. This type of fundraising does not require a license.

Who is eligible to obtain a raffle license?

For the purposes of charitable gaming, only registered religious or charitable organizations are eligible to obtain a raffle license. These organizations must be able to prove they meet certain mandatory requirements outlined by the federal government and comply with all special accounting and audit requirements. The Bike Rally and PWA will not apply for a raffle license for any Third Party event.

Can I get a raffle license for my event?

Only registered religious or charitable organizations are eligible to obtain a raffle license. Due to the amount of time, administration and cost involved PWA will not obtain a raffle license for any Bike Rally Personal Fundraising Event.

PRIVACY

How does privacy legislation impact me?

Toronto People With AIDS Foundation respects your privacy. It has always been a standing policy at our organization to never sell, trade or loan your information to any other organization. We disclose your information only to our own employees and agents only for statistical purposes, to process and recognize your donation(s) and to update you on organizational initiatives through distribution of our newsletters and other materials. By providing personal information, you consent to our collection and use of the information you provide.

What if I want to contact my event's online donors (if my event has an on-line component) and I don't have their contact information?

As part of the on-line set-up we have included a disclaimer letting all donors/sponsors/purchasers know that we will be sharing their contact information with the Event Organizer to complete their transaction.

What if people ask me about the Foundation's privacy policy or if I have additional questions about it?

Please refer them to our privacy officer, Kevin Gerber, at 416-506-1400 ext. 240 or to visit the PWA Disclaimer and Confidentiality section of our website, www.pwatoronto.org, for more information.