



**education foundation**  
of niagara

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THIRD PARTY FUNDRAISING  
AGREEMENT FORM



## Third Party Fundraising Policies, Criteria and Guidelines

Thank you for choosing the Education Foundation of Niagara as your first stop to **better our school community**. All of us at the Foundation are committed to making your experience with us seamless and enjoyable. This document outlines Foundation policies, guidelines, and frequently asked questions (FAQ) regarding the Foundation's third party fundraising and fundraising events.

Firstly, let's get your creative juices flowing. Here is a list of fundraising ideas we recommend:

- Marathons, half-marathon and related events – enter a race and find sponsors to cheer you on.
- Sport-themed event – have friends place bets on their favourite sports teams. Proceeds go toward the Foundation.
- Community social, fair or carnival – set up a fun day of carnival games and treats. Proceeds go toward the Foundation.
- Large dinner party – charge per plate and proceeds go the Foundation.
- Block party – rally the neighbours and host a massive party. Proceeds go towards the Foundation.
- BBQ Contest – host a battle of grills. Proceeds go towards the Foundation.
- Garage or Yard sale – get rid of unwanted clutter. Sell your unwanted items and donate the proceeds to the Foundation.
- Birthday or Retirement party – in lieu of gifts.
- Wedding – in lieu of favours.

In accordance with Revenue Canada (CRA) guidelines and for the benefit of the Foundation and all involved, the Education Foundation of Niagara has created the following policies:

### Policies

Third Parties are asked to:

- Contact the Education Foundation of Niagara **prior** to hosting any event.
- Be consistent with the Foundation's mission, vision, and values [refer to [Appendix A](#)].
- Maintain the **positive image** that our volunteers and staff take pride in.
- Acquire the necessary licenses and permits if need be.

For more information on ways the Foundation can help please refer to the attached **FAQ**.

### Criteria

There are **three (3) easy steps** to start making a difference in your school community.

1. The Education Foundation of Niagara requests four (4) weeks' notice of third party fundraising events.
2. Complete the attached Third Party Fundraising Agreement Form and submit for approval.
3. Once approved, notification will be sent to be signed and returned to the Foundation no later than two (2) weeks prior to the event.

The Executive Director (or designate) for the Education Foundation of Niagara will approve a third party fundraising event and sign the Third Party Fundraising Agreement based on compliance with the criteria above.

## Guidelines

Please  
initial  
each box

The following guidelines are not intended to restrict the **creativity and passion** of our generous third party sponsors; however, they should be taken as measures to ensure the safety and standards of the Foundation, its volunteers and staff.

### 1. Branding & Marketing:

- **Company Name-** In any promotional materials, third parties are required to refer to the Foundation as the Education Foundation of Niagara.
- **Logo and Logo Use-** Please consult the Education Foundation of Niagara’s Executive Director or assigned staff prior to the use and presentation of the Foundation’s name or logo. Use of company logo must be approved prior to public presentation [see attached for the **Name, Logo Usage and Style Guide**].
- **Promotional Material-** The Foundation will have final approval on all promotional materials used for the event (i.e. brochures, flyers, advertisements, newsletters, media communication, etc.) prior to public presentation.
- **Marketing-** Third Party Organizers are encouraged to use positive marketing and public relations exposure when promoting their event.

### 2. Donations and Sponsorships:

Third parties are asked to provide a list of sponsors and contact info (i.e. email/phone number). This in turn aids the Foundation and helps us recognize our partners within the community. The Education Foundation of Niagara will not solicit sponsors on behalf of the Third Party.

### 3. Staffing and Volunteers:

Third Party Organizers are asked to provide necessary staffing and recruitment of volunteers for the fundraising event.

### 4. Financing and Insurance:

- The Foundation will not underwrite any third party event.
- The Foundation’s insurance will not cover any third party events. As such the Foundation will not be responsible for any damages, accidents to persons or property at a third party event.
- The Foundation **will not** assume any legal or financial liability for the event.

### 5. Accountability

Third Party Event Organizers will:

- Provide a minimum of one (1) week notice for any third party event cancellation.
- Inform the Foundation if the third party event will benefit any other charity partners.
- Be responsible for any financial losses or unsettled accounts.

#### **6. Lottery Licenses**

Third party events involving special permits, licenses and fees will conform to government regulations. It is the sole responsibility of the Third Party Event Organizers to fill out and submit all applications. Third Party Event Organizers are also responsible to pay the fees for said licenses.

#### **7. Liquor Permit**

- Third Party Organizers are asked to provide a Special Occasion Permit (SOP) form from the LCBO if the organizers are running the bar.
- The permit must be obtained and held by the individual(s) holding the event.
- All regulations regarding the liquor permit are enforced.

#### **8. Photographs**

The Foundation reserves the right to display any photos or comments from individuals attending the third party events on the website, all social media platforms, newsletter, brochures, and/or any other promotional materials [see attached for [Photography Consent Form](#)].

## Frequently Asked Questions

### **I have an event idea. What is my next step?**

Once you have decided the Education Foundation of Niagara is the right fit for your event, we encourage you to complete our Third Party Fundraising Events Application Form [see attached [Application Form](#)] prior to hosting/advertising the event. Once we have received your application, a staff member of the Foundation will contact you to further discuss your options.

### **Can the Foundation mail/email event information to donors?**

Absolutely. We are happy to provide mailing support for third party fundraising events.

### **Can the Foundation mail/email event information to schools?**

The type and purpose of the event will determine whether the Foundation can distribute event information to schools.

### **How can the Foundation promote our third party event?**

We can promote your third party event through the Foundation's various outlets (i.e. webpage, social media, and email).

### **Can the Foundation help acquire staff and volunteers for the event?**

We ask the Third Party Organizer to be the primary supplier of staff and volunteers; however, the Foundation will offer assistance if need be.

### **Can the Foundation help find us a venue for the event?**

Unfortunately, the Foundation cannot source an event venue for you; however, we are willing to offer advice on where to look.

### **Can the Foundation offer funds to help pay for third party event expenses?**

Unfortunately, the Foundation cannot offer funds to help support the event; however, we may provide in-kind support, such as staff time, promotion, advertising, etc.

### **Can the Foundation provide tax receipts to third party event donors?**

Of course. The Foundation will provide receipts for income tax purposes as outlined in Appendix B.

### **Can donors receive tax receipts for non-monetary donations?**

In accordance with the CRA, please contact Foundation staff for more information.

For **further questions or inquiries** please contact Laura Byers, Executive Director at (905) 641-2929 ext. 37711, regular office hours, Monday to Thursday.

## Appendix A

### Mission, Vision and Values

Third Parties are encouraged to follow the Foundation's mission, vision and values

- **Mission:** We support DSBN students by engaging the community to provide needed funds and resources where government funding is not available. Through our donors we:
  - provide support to students in financial need for basic necessities and extra-curricular activities
  - provide annual student awards and bursaries
  - support progressive programs and services in our schools that enrich students' educational experiences
  - provide innovative community initiatives
  - manage designated gifts in accordance with donor specifications
- **Vision:** A community where every student has access to all of the enriching opportunities school life offers.
- **Values:**
  - Caring- a passion for equal opportunity is at the heart of our work
  - Purposeful- we are committed to making a difference in our community
  - Relationships- we act with honesty, respect and transparency

## Appendix B

### Charitable Tax Receipts (CRA Requirement)

A charitable tax receipt is given to individuals or groups who make a donation to a registered charity. The donations must be made directly to the Education Foundation of Niagara and without personal return. One will not get a tax receipt for purchasing a ticket to an event, sponsoring an event, or buying an auction item or raffle ticket, etc.

In compliance with CRA requirements, please add the following donor contact information:

- donor's name
- donor's address (including postal code)
- donor's telephone number (including area code)
- amount of donation

**The Foundation will provide tax receipts for donation of \$10.00 and above.**

# Education Foundation of Niagara

## Identity Reference



### Logo

The Education Foundation of Niagara logo was redesigned in 2015. The goal of the redesign was to give the logo a fresh and modern look. This logo should be used on all new print and web materials.

The logo illustration can be viewed as a book (an international symbol for education and learning) or a symbol for growth. The lines appear blooming, all starting from the same point and growing from there.

The coloured logo should be used whenever possible, but only on a white or extremely light-coloured background. If the background is black or dark-coloured, use the white logo. If the background colour is light-coloured, use the black logo.

### Logo Guidelines

The Education Foundation of Niagara logo should be a minimum size of 1.25" to ensure that it is readable.

The logo should be kept away from other text or other design elements. This will ensure the integrity of the logo and achieve maximum recognition.

Ensure the logo has a minimum protected space of the height of the letter "f" in the logo.



The logo should always be scaled proportionately. You can scale the logo properly in most programs by holding "shift" down while scaling.



<b>C</b> 0 <b>R</b> 247 <b>M</b> 50 <b>G</b> 148 <b>Y</b> 100 <b>B</b> 30 <b>K</b> 0	<b>C</b> 35 <b>R</b> 158 <b>M</b> 100 <b>G</b> 31 <b>Y</b> 35 <b>B</b> 99 <b>K</b> 10	<b>C</b> 100 <b>R</b> 0 <b>M</b> 24 <b>G</b> 116 <b>Y</b> 0 <b>B</b> 17 <b>K</b> 24
PMS 1495	PMS 7648	PMS 7690

<b>C</b> 55 <b>R</b> 133 <b>M</b> 80 <b>G</b> 82 <b>Y</b> 0 <b>B</b> 161 <b>K</b> 0	<b>C</b> 50 <b>R</b> 141 <b>M</b> 0 <b>G</b> 198 <b>Y</b> 100 <b>B</b> 63 <b>K</b> 0	<b>C</b> 0 <b>R</b> 88 <b>M</b> 0 <b>G</b> 89 <b>Y</b> 0 <b>B</b> 91 <b>K</b> 80
PMS 2587	PMS 360	PMS 425

### Colours

The colour breakdowns are above. When creating a print file, use the CMYK breakdowns. When creating a file for the web, use the RGB breakdowns.

Print vendors may ask for the pantone version of your logo or colours. Those are noted above as well.

# Education Foundation of Niagara

## Identity Reference

### Fonts

The Education Foundation of Niagara uses the display font Century Gothic. This typeface is best used for titles, headlines, posters and any copy that would be considered a header.

For body copy like paragraphs or blocks of text, use a readable font like Helvetica or Arial. This handout uses Helvetica.

### Century Gothic

ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz

**ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz**

*ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz*

### Helvetica (Neue)

ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz

**ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz**

*ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz*

### Arial

ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz

**ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz**

*ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz*

### Contact

Laura Byers, Executive Director  
laura.byers@dsvn.org  
905-641-2929 ext. 37711

Supporting DSBN students by engaging the community to provide needed funds and resources where government funding is not available.



I, (print parent or guardian name) \_\_\_\_\_  
give my permission for the Education Foundation of Niagara to use  
\_\_\_\_\_’s photo for  
marketing and social media purposes. These may include but is not limited to  
Foundation newsletter, direct mail campaign letters, brochures as well as  
Facebook, Twitter, Instagram, LinkedIn and website.

Sincerely,

\_\_\_\_\_

Date

\_\_\_\_\_



**THIRD PARTY FUNDRAISING  
EVENTS AGREEMENT FORM**

**HOST INFORMATION:**

Business or Organization Name: \_\_\_\_\_

Main Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Cell: \_\_\_\_\_

Email Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

**Social Media (if applicable):**

Facebook Event Page: \_\_\_\_\_

Twitter Username: \_\_\_\_\_ Instagram Username: \_\_\_\_\_

**Why did you decide to support the Education Foundation of Niagara?**

\_\_\_\_\_  
\_\_\_\_\_

**EVENT INFORMATION:**

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_ Event Time: \_\_\_\_\_

Event Location: \_\_\_\_\_

Event Description:

\_\_\_\_\_  
\_\_\_\_\_

**FINANCIAL INFORMATION:**

What is your fundraising goal? \_\_\_\_\_

How are you planning on fundraising for the Education Foundation of Niagara? (i.e. raffle, silent auction, ticket sales etc.)

\_\_\_\_\_  
\_\_\_\_\_

Expected number of participants? \_\_\_\_\_

Do you require tax receipts? Yes \_\_\_\_\_ No \_\_\_\_\_

*\*\*\*All tax receipting must be discussed with Foundation Executive Director or appointed staff member prior to the event. Tax receipting will be completed in adherence with the regulations of the Canada Revenue Agency and the policies and procedures of the Education Foundation of Niagara.\*\*\**

**PROMOTION:**

How are you planning to promote your event? (check all that apply)

Posters\_\_\_\_Flyers\_\_\_\_Newspaper\_\_\_\_Web\_\_\_\_Social Media\_\_\_\_Other\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Are you planning to use the Education Foundation of Niagara logo for promotion? Yes \_\_\_\_\_ No \_\_\_\_\_

Would you like to be listed under the Education Foundation of Niagara "Events" listing?

Yes \_\_\_\_\_ No \_\_\_\_\_

Which of the following would you like the Foundation to provide? (check all that apply)

Logo\_\_\_\_Signage\_\_\_\_Newsletters\_\_\_\_Brochures\_\_\_\_Other\_\_\_\_\_

Do you require a Foundation representative to attend? Yes \_\_\_\_\_ No \_\_\_\_\_

(if yes, please specify the role of the Foundation rep): \_\_\_\_\_

\_\_\_\_\_

**TERMS AND CONDITIONS:**

- I agree the Education Foundation of Niagara’s name and logo are important symbols which should not be misrepresented in the community. Prior to publicizing or holding the event, the Foundation must approve the use of their name and logo.
- The Education Foundation of Niagara assumes no legal responsibility or financial liability associated with this event.
- The Education Foundation of Niagara cannot be held liable for any risk or injury or other damages in conjunction with this event.
- Tax receipts will be issued in accordance to Canada Revenue Agency guidelines.
- Proceed from this event will be directed to the Education Foundation of Niagara **within 60 days** of this event.
- If the event is cancelled, the Education Foundation of Niagara must be notified within five (5) business days.
- The Education Foundation of Niagara reserves the right at any time to withdraw its support of the event and the use of the Foundation name and logo should the event undermine the Education Foundation of Niagara’s mission, values and established policies.

**By signing below I verify that all information on the Third Party Event Agreement Form is accurate and I agree to the terms and conditions as outlined above:**

Name (please print): \_\_\_\_\_

Signature of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

**Please submit the completed Third Party Agreement Form with any attachments:**

- **By mail:** Education Foundation of Niagara  
Attn: Event & Communications Officer  
191 Carlton Ave, St. Catharines ON L2R 7P4
- **By email:** [efn@dsbn.org](mailto:efn@dsbn.org)

For questions or further inquiries, please contact the Foundation office at 905-641-2929 ext. 37710.

**THANK YOU!**  
**Our students. Our future.**