



YOUR GUIDE TO HOSTING EVENTS

TO BENEFIT THE UNIVERSITY OF ONTARIO INSTITUTE OF TECHNOLOGY

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For an alternative format of this information, contact projects@uoit.ca.

Message from the Vice-President, External Relations and Advancement

Dear Friend:

Thank you for organizing an event for the University of Ontario Institute of Technology (UOIT).

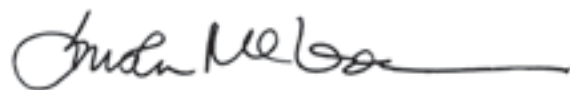
We are so grateful to have partners like you who understand the value of an education and the need to raise funds to support our students. You are helping make the future they are working so hard to achieve a reality.

Organizing an event can take a great deal of time and energy. This guide is intended to help you maximize your results, while minimizing the resources and time you have to spend. Within its pages you will find the resources you will need to plan your event, as well as who to contact for more information or assistance.

If you have any suggestions on how to improve this document, ideas for other events, or any other questions, please contact the Advancement office at 905.721.8668 ext. 5660 – we are here to help!

Thank you for giving your time and talents to help our students – your efforts and commitment are truly appreciated.

Sincerely,



Susan McGovern
Vice-President, External Relations and Advancement



**By hosting a
third-party event
to support the
University of
Ontario Institute
of Technology, you
make a difference
in the lives of
students and their
future!**

Six tips to get started

Here are some tips to help you get started; please use these with the guidelines outlined in this document. The Advancement office will provide you with additional information when your event is approved.

1 GET ORGANIZED

- Brainstorm! The best events are creative and different – think outside the box with your committee – but know your audience.
- Give yourself plenty of time to organize the event. Ensure you have evaluated your time, your volunteer committee's time and responsibilities.
- Know your committee's strengths and appoint one person to be the chair – someone should be responsible to oversee everyone else's roles and assignments.

2 DESIGN THE EVENT

- Determine the type of event you are hosting: sport, gala, meal, 'thon'.
- Ensure you have sufficient people on the organizing committee; if not, recruit more.
- Create a realistic plan with a goal and budget.
- Confirm specifics: date, time, location, permits and licenses required, fundraising goal.

3 APPROVAL PROCESS

- Please read this entire guide before submitting your request for approval.
- Ensure you are clear about the promotional and financial requirements, as well as licenses, insurance, and tax receipting – this is very important.
- Submit the completed form requesting approval at least 60 days before your event.

4 DETAILS

- Know your timeline to ensure important tasks are completed in sequence.
- Recruit volunteers and participants for the event.

5 EXECUTE THE EVENT

- Promotion and publicity.
- Troubleshoot: review plans, budget, timeline, volunteer roles.
- Be well organized – assign tasks to others.
- Thank all your volunteers and supporters.
- Enjoy the event!

6 THE WRAP UP

- Submit funds within 30 days with lists of sponsors, donors and those waiting for receipts.
- Ensure all your finances balance, vendors are paid, rental items returned.
- Thank your volunteers, donors, sponsors, supporters and participants.
- Debrief: what worked, what didn't go well, how could you improve?
- Congratulate your team and plan another event!

BEFORE YOU BEGIN:

- 1** Contact us 60 days before your event to get the required approval.
- 2** The Advancement office will get back to you within one week of reviewing your event form (see blank form attached to this guide).
- 3** Even if your event is within 60 days – contact us and submit the form. Call ASAP!
- 4** The university reserves the right to ask for more information before approving any event.
- 5** Please direct any questions and your form to:
ADVANCEMENT OFFICE
2000 Simcoe Street North
Oshawa, Ontario L1H 7K4
Canada
905.721.8668, ext. 5660
advancement@uoit.ca

Approval of your event

The university must approve any initiative or third-party fundraising event when its name and brand are associated, and where there is an expectation we may be issuing charitable receipts. Third-party events must be in keeping with the university's reputation, mandate and philanthropic goals. Revenue raised through the event must meet the priorities of the university's fundraising efforts (Student Success Fund, capital projects, etc.). You should consult with the dean and/or director of the faculty or department that will benefit from the proceeds of your event to ensure they are aware of, and supportive of, your event.

The university will not support or partner with any third-party event that discriminates against any person or group. This includes accommodation under the Accessibility for Ontarians with Disabilities Act (AODA), so please ensure your proposed event venue complies with the AODA.

The approval process is easy – submit the form found at the end of this guide no later than 60 calendar days before your event. The Advancement office will get back to you regarding your proposed event within five business days of receiving the form and, if your event is approved, a written agreement between you and the university will be signed.

The university respectfully reserves the right to decline any event that is not in keeping with its mission, goals and objectives, or which has not received prior approval. It also reserves the right to revoke approval, without liability or obligation, if an event's organizers do not abide by the policies, criteria, responsibilities and guidelines set out in the agreement.

Help from the university

As soon as your event is approved, the university can assist you in the following ways:

- Advice on event planning and which donations are eligible for charitable receipts.
- Letters of authorization for insurance, licenses and other official documents required for your event.
- Permission to use the university's logo, details on acceptable use and brand standards.
- Brochures and display items to help showcase the university.
- Banners and posters to help decorate your venue.
- Event promotion through the university's website.
- Recognition of the event and your supporters on the university's website post-event, and in donor materials throughout the next year.
- Official donation receipts for cash donations (if no benefit to the donor has been received).
- A speaker and/or representative from the university at the event (provided sufficient notice is given).

The university sincerely appreciates your gift of time and talent to help advance its mission and its students through your efforts. The Advancement office has limited resources and staff with their own events, duties and fundraising responsibilities to manage. Consequently, the Advancement office is unable to do the following to assist third-party event organizers:

- Book or organize your venue, food, entertainment or promotional materials.
- Provide onsite volunteers or staff to help at your event.
- Share any mailing lists or lists of affiliates (including donors, staff, faculty, students, parents, alumni, vendors or volunteers).
- Generate or pay for event promotional materials, publicity or media releases.
- Provide insurance coverage, permits, licenses or gaming licenses, although the Advancement office will provide you with back-up documentation for your applications.
- Offer sponsors, sponsorship funds or any funding to organize, implement or support the event.
- Guarantee the attendance of faculty, students, volunteers at the event or subsequent cheque presentations.

PLEASE NOTE: The university and the Advancement office will not assume any liability for your event or for the organizing and execution of it.



THIRD-PARTY FINANCIAL RESPONSIBILITIES

All funds donated to the university must be accounted for appropriately, whether it is a donation from an individual or the proceeds from a third-party event.

EXPENSES

As an event organizer, you are responsible for sourcing the funds necessary to operate your event. Third-party expenses cannot be processed by the university including invoices, down payments, or credit or debit card transactions.

While event organizers are not able to pay themselves or other volunteers for their time organizing the event, you can reimburse yourself for expenses paid for in advance (e.g. the fee to the LCBO, ticket printing, a down payment on the venue).

If the expenses of the event are greater than the amount raised, the university is not responsible for those costs. A complete and realistic budget is an important step in organizing your event. Plan on paying for everything, and then when items are discounted or free, you will be ahead!

EVENT BANKING

The university is not able to serve as a 'bank' for your event or provide you with any start-up funds. It is very important you set up a tracking system to record each expense, and money received as donations, gifts of supplies, etc. A separate bank account for your event is the best way to do this. Proper record keeping is important for legal and accounting purposes for yourself and the university. Ensure your committee members are accounting for their expenses and items or funds received.

FINANCES AND INSURANCE

It is the responsibility of event organizers to cover all costs, and any financial losses or unsettled accounts. The university is unable to provide any funding in advance to cover upfront expenses, loans, sponsorships or donations. The university's insurance does not cover any part of an event organized by a third-party.

ACCOUNTABILITY

Please ensure the Advancement office receives:

- A copy of all permits, licenses and insurance and a final budget 10 business days before the date of the event.
- Status reports on an agreed-upon basis – the Advancement office may be able to help you troubleshoot or provide ideas.
- Notice of any changes in the date, venue, entertainment or cancellation as soon as these are known.
- The name of other charities or non-profits involved in the event.
- The profit (proceeds) after the event, along with a final record of revenue and expenses and a complete list of donors eligible to receive receipts, including their contact information.

PLEASE NOTE: tax receipts cannot be issued until you have submitted the proceeds and this information.

ORGANIZING YOUR EVENT

When you have received your approval from the university to host a third-party event, please follow these guidelines:

THE UNIVERSITY'S BRAND

Along with your signed agreement, you will receive a copy of the university's **Logo Usage and Guidelines**. It is essential you follow these standards whenever you are referring to the university and using its logo.

- Please refer to the university as: The University of Ontario Institute of Technology (UOIT) the first time you use the name in any given context. Afterwards you may use UOIT, although the term 'the university' is preferred.
- **Logo:** Usage of the university logo is limited to your approved event.
- **Promotional materials:** the university must sign off on all event materials (e.g. brochures, tickets, flyers, advertisements and public communications) utilizing its name and logo. Please ensure the Advancement office has copies of your materials for approval at least one week in advance of any logo usage in print or electronic media.
- It is important to state on letters and promotional materials: "All proceeds from this event will support the University of Ontario Institute of Technology." It is also important you do not say in materials, "University of Ontario Institute of Technology event...", as this event is organized by you and a group of volunteers, not the university.

DONATIONS AND SPONSORSHIP

- Before soliciting any potential significant donors or sponsors please provide the Advancement office with a list of those you are planning to approach so it can be reviewed. This is to ensure donors and sponsors do not receive multiple requests related to fundraising at the same time.
- After your event, please provide the Advancement office with a complete list of people who donated to or sponsored the event and include a description of what was given to you to support the event, with the retail value. This allows us to recognize these supporters properly.

LICENSES AND PERMITS

Licenses and permits must conform to all federal, provincial and municipal government regulations and generally must be applied for far in advance of the event day. It is the sole responsibility of the event organizer to apply for and secure all necessary licenses and ensure adequate time is given to the university for review of your applications if required. You must pay for the licenses and permits and complete any necessary paperwork or reports due after the event.

Copies of all licenses and permits must be sent to the university 10 business days before the event and the originals should be on hand on the day of the event in a secure place.

By Ontario laws, any gaming requires a license, regulated by the Alcohol and Gaming Commission of Ontario. Please visit their website: www.agco.on.ca

LICENSE TO SERVE ALCOHOL

- A Special Occasion Permit (SOP) liquor license must be obtained from the Liquor Control Board of Ontario (LCBO) if the venue is **not** operating the bar (if they are operating the bar, they already have a license). Information regarding SOP permits can be found at www.agco.on.ca.
- The person officially hosting the event must have the permit on their person at the event.
- The LCBO must receive the application 30 days in advance of the event at their specific SOP stores. Visit www.hellolcbo.com or call 1.800.668.5226 for SOP store locations. There is a fee for the license.
- A letter from the university must accompany the application with its Canada Revenue Agency number on it. Please provide at least one-week notice in advance of needing the letter.
- Five business days prior to the event, event organizers must provide the university with a Party Alcohol Liability Insurance Policy (a PAL).
- All regulations on the liquor license must be followed precisely.

STAFFING AND VOLUNTEERS FOR YOUR EVENT

The university is unable to staff your event or provide volunteers to help you before, during or after the event. If you would like your volunteers to receive a thank you letter, the Advancement office can provide you with a sample letter to send to your donors and supporters, however the university cannot incur the costs associated with sending these letters.

CONTRACTUAL AGREEMENTS

The university is not to be named on any contracts or agreements without written consent. Please provide sufficient notice if you require written consent. Do not sign contracts “on behalf of UOIT.”

POST-EVENT PHOTOGRAPHS

In order to recognize your event and thank you, your committee, participants and supporters, the university reserves the right to use any photographs or quotes from people participating at your event for its website, social media channels or other promotional materials. Participants need to be made aware that by consenting to be photographed at the event, they are giving permission for use of the image by the university for these purposes.



CHARITABLE TAX RECEIPTS AND GIFTS-IN-KIND

The university reserves the right to issue, or not issue, receipts for third-party events. If there are donations deemed eligible by Canada Revenue Agency regulations to receive a receipt for income tax purposes, and if it has been agreed in advance of the event that receipts will be issued, they will be provided by the Advancement office.

CHARITABLE TAX RECEIPTS

Personal donations to registered charities, like UOIT, are eligible for a receipt for income tax purposes. It must be made directly to the university by cheque, credit card or cash and there cannot be any personal gain to the person making the donation (e.g. a meal, opportunity to win a prize, participation in a game [golf tournament], or purchase of an auction item).

Donation cheques should be made payable to:
University of Ontario Institute of Technology.

To issue receipts, the Advancement office requires a typed list with the donor's name, full address with postal code, phone number including area code, the amount received and the amount to be receipted.

Processing the receipts will take 45 days from the time you have completed the final financial report and delivered everything to the Advancement office.

Receipts are issued for donations of \$20 or more.

SPLIT RECEIPTING

If your event has a ticket, admission or participation price that does more than cover the cost of the attendee's participation, a portion of the ticket price may be eligible for a donation receipt through a process called split receipting.

In order to calculate whether your ticket has an eligible amount that can be considered as a donation for receipting purposes, the fair market value of the 'advantage' (or consideration) received by the attendee (e.g. a meal, round of golf, entertainment) must be calculated. To determine the eligible amount for receipting purposes, the value of the advantage must be subtracted from the ticket or admission price.

Auction item purchases are not eligible for split receipting, even when the successful bid is beyond established fair market value.

The university reserves the right to decline to issue receipts that are deemed ineligible.

For more information on split receipting, please visit the Canada Revenue Agency website at www.cra-arc.gc.ca.

GIFTS-IN-KIND

Gifts of supplies, books, equipment, artwork and other tangible items donated to your event are considered gift-in-kind. Gift-in-kind donors will not receive official donation receipts, however the university will produce a letter of thanks to acknowledge the gift. These letters must be specifically requested by you and full details given as to the donation and donor contact information. Please allow 45 days for processing once the request has been made.

PLEASE NOTE: Donated services (such as legal advice for an hour), gifts of a company's products from inventory (e.g. a chocolate company gives a box of chocolates for every guest at the event), used clothing, furniture, etc. are also not eligible for official donation receipts.

If you would like more information about official donation receipts, please visit: www.cra-arc.gc.ca or call the Advancement office at 905.721.8668 ext. 5660



THIRD-PARTY EVENT TIMELINE

NO LATER THAN 60 DAYS BEFORE PROPOSED EVENT

- Complete application form and submit to the university for approval.

WITHIN FIVE BUSINESS DAYS OF CONTACT, AND IF EVENT IS APPROVED

- A written agreement between you and the university will be provided.

NO LATER THAN 40 DAYS IN ADVANCE OF EVENT

- Formally request a letter from the university to include as an attachment with your Special Occasion Permit liquor license application (if a liquor license is required).

NO LATER THAN 30 DAYS IN ADVANCE OF EVENT

- Submit an application to LCBO for liquor license.

NO LATER THAN FIVE BUSINESS DAYS OF EVENT PROMOTION

- Submit event materials to the Advancement office for approval in advance of any print or electronic logo usage.

NO LATER THAN 10 BUSINESS DAYS WITHIN EVENT

- Copy of all permits, licenses, insurance and final budget.

NO LATER THAN FIVE BUSINESS DAYS OF EVENT

- PAL Insurance policy submitted to the university.

WITHIN 30 DAYS FOLLOWING EVENT

- Submit funds to the university with lists of sponsors, donors and those eligible for official tax receipts.

WITHIN 45 DAYS OF RECEIPT OF THE PROCEEDS AND REQUIRED DOCUMENTATION, THE UNIVERSITY WILL:

- Issue tax receipts with thank you letters.
- Issue thank you letters for gift-in-kind (not eligible for tax receipt).

Third-Party Event Proposal Form

SECTION 1 – CONTACT INFORMATION

Date: _____

Host/group/company planning this event: _____

Event host/organizer's name: _____

Address: _____

Phone: () _____ home () _____ cell () _____ work

Email: _____

SECTION 2 – PROPOSED EVENT DETAILS

Name of proposed event: _____

Event location and address: _____

Date(s) and time(s): _____

This event is: _____ By invitation only Open to the public

Briefly describe proposed event details, purpose and target audience:

Have you consulted with a faculty or staff member about this event? Yes No

If so, who (name and position)? _____

Are there any other beneficiaries besides UOIT? Yes No

If yes, please note percentage designated to each organization: _____

Will event organizers gain monetarily from this event? Yes No

If yes, do these persons have connections to a business that will benefit from this event? Yes No

If yes, please explain: _____

Is the event venue in compliance with the Accessibility for Ontarians with Disabilities Act? (For more information go to www.ontario.ca/AccessON) Yes No

SECTION 2 – PROPOSED EVENT DETAILS

All costs associated with the event are the responsibility of the organizing committee. These costs must be paid by the event proceeds or paid directly by the event organizer. The university cannot be held responsible for costs incurred related to the event. Please list all revenue and expenses in your budget. Please indicate if you expect any donations or expenses/services to be donated.

Gross revenue (a)	\$
Expenses: Venue rental Food and beverage Printing (tickets, posters, etc.) Advertising Prizes Permits Other (please specify)	
Total estimated expenses (b)	\$
Total estimated net revenue (a – b)	\$
Anticipated donations:	
Total net revenue:	

Upon approval of your event, a detailed budget will be provided to assist you in tracking your expenses.

Do you agree the university will receive all net revenue from the event within 30 days of the event?

Yes No

Would you like the funds raised to be designated to a specific program or area?

Yes No, please direct to area of greatest need

If yes, please indicate where:

- | | |
|---|--|
| <input type="checkbox"/> Student Success Fund | <input type="checkbox"/> Faculty of Energy Systems and Nuclear Science |
| <input type="checkbox"/> Faculty of Business and Information Technology | <input type="checkbox"/> Faculty of Health Sciences |
| <input type="checkbox"/> Faculty of Education | <input type="checkbox"/> Faculty of Science |
| <input type="checkbox"/> Faculty of Engineering and Applied Science | <input type="checkbox"/> Faculty of Social Science and Humanities |
| | <input type="checkbox"/> Other: _____ |

SECTION 4 – DO YOU REQUIRE UNIVERSITY PROMOTIONAL MATERIALS AT THE EVENT?

YES NO

If yes, choose from the following and indicate approximate numbers:

BROCHURES Yes No

- | | |
|--|----------------|
| <input type="checkbox"/> Student Success Fund | Quantity _____ |
| <input type="checkbox"/> Firefly (Student Entrepreneurship Fund) | Quantity _____ |
| <input type="checkbox"/> Legacy Gifts (e.g.: wills, gifts of life insurance) | Quantity _____ |
| <input type="checkbox"/> Other: please specify _____ | Quantity _____ |

POP-UP BANNERS Yes No

- Alumni Relations Faculty – Please specify _____

OTHER REQUESTS _____

Do you require a copy of the university's logo for your promotional materials? Yes No

If yes, please indicate the format:

- .TIFF .JPEG
 .GIF .PDF

Do you agree to submit all publicity for the proposed event for approval by the university prior to being released, printed, etc.? Yes No

Date expected: _____

Note: The name of your event may identify the relationship with the university such as the 'Jane Smith Run' in support of University of Ontario Institute of Technology, but not incorporate the university's name as in 'University of Ontario Institute of Technology Jane Smith Run'.

Would you like a university representative to speak at your event? Yes No

The Advancement office is pleased to provide official donation receipts for eligible gifts made to the University of Ontario Institute of Technology as a result of your event. Tax receipts will be issued in accordance with the university's Gift Receipt Policy and Procedures and Canada Revenue Agency regulations. Upon approval of your event, the university will determine whether tax receipts are applicable.

Will your event require official donation receipts for donors? Yes No

Note: If you are unsure if your event is eligible for official donation receipts visit Canada Revenue's guidelines available online at www.cra-arc.gc.ca or contact the Advancement office.

Do you require promotion of your event through the university's communications team? Please review the following list and check the boxes the Advancement office can provide for your event.

- Displayed on the upcoming events section of the university's website.
- Displayed on the Alumni office's website.
- Displayed as part of the Alumni office's social media accounts such as Facebook, Twitter, LinkedIn.
- Included in the electronic newsletter distributed to faculty and staff.

Please complete and return this form no later than 60 calendar days before your proposed event. Only complete forms will be taken under consideration. A representative of the Advancement office will contact you within one week to follow up on your application.

University of Ontario Institute of Technology
Advancement office
2000 Simcoe Street North, Oshawa, Ontario L1H 7K4
905.721.8668 ext. 5660 · advancement@uoit.ca · 905.725.5475 (fax)

I, _____, agree on behalf of _____ that I understand the third-party event guidelines supplied by the University of Ontario Institute of Technology (UOIT) and my responsibilities as a third-party event host pertaining to compliance with University Policies and Procedures, Canada Revenue Agency guidelines and all applicable federal, provincial and municipal laws and regulations. I promise to abide by and adhere to all requirements and attest the information provided on this form is correct and accurately describes the proposed event.

Event host/organizer's signature

Date

Thank you for your support!

FOR ADVANCEMENT OFFICE USE ONLY

Date received: _____ Received by: _____

Approved Not approved

Vice-President, External Relations and Advancement

Date

ADVANCEMENT OFFICE

2000 Simcoe Street North
Oshawa, Ontario L1H 7K4
Canada

905.721.8668, ext. 5660
advancement@uoit.ca
905.725.5475 (fax)