

2022

Third Party Fundraising

CRITERIA, GUIDELINES AND RESPONSIBILITIES
CANADIAN MENTAL HEALTH ASSOCIATION, PEI DIVISION

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**Canadian Mental
Health Association**
Prince Edward Island

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1.0 INTRODUCTION

Thank you for considering the Canadian Mental Health Association as the recipient of proceeds from your fundraising initiative. Through your fundraising efforts CMHA-PEI is able to work towards the goal of mental health for all Islanders. The following information provides guidance to individuals and organizations on CMHA-PEI's policies and procedures for officially recognizing third party fundraisers.

1.1 About CMHA-PEI

The Canadian Mental Health Association – PEI Division (CMHA-PEI) has been offering community-based supports and services and promoting the mental health of all Islanders since 1959. As one of ten provincial divisions of Canada's first and only truly national mental health organization, CMHA-PEI specializes in providing services and supports tailored to Islanders and their mental health needs. The work of CMHA-PEI directly impacts the lives of many individuals and their families struggling with their mental health. CMHA-PEI partners within the community and with government to provide these services and supports.

Our **MISSION** nationally is to facilitate access to the resources people require to maintain and improve mental health and community integration, build resilience, and support recovery from mental illness. Our **VISION** is “mentally healthy people in a healthy society”.

1.2 What is Third Party Fundraising?

Third party fundraising involves independent projects undertaken by an individual, business or organization for the purpose of raising funds for, or on behalf of, a chosen charity. This can include, but is not limited to:

- **Hosting and event** where proceeds, or a portion thereof, are promoted as going specifically to the Canadian Mental Health Association. Examples:
 - Fun Run
 - Golf Tournament
 - Gala Dinner

- **Delivering a fundraising campaign**, where you solicit donations directly from others for the purposes of donating 100% of received donations to the Canadian Mental Health Association. **Acceptable** campaigns include:
 - Dress down days at work
 - Peer to peer fundraising where you reach out to your network to donate directly or sponsor you in an event (fun run)
 - Purchase plus campaigns usually waged at check-out lines where customers are asked if they'd like a donation added to their bill or there's a donation box present (See section 2 for a list of campaign examples not supported)

- Engaging in **cause marketing** where it is promoted that a portion of sales goes directly to the Canadian Mental Health Association. Examples:
 - o 10% of each t-shirt sale goes to the Canadian Mental Health Association
 - o \$1 from every coffee sold on March 4 goes to the Canadian Mental Health Association

2.0 WHAT CMHA-PEI DOES NOT SUPPORT

CMHA-PEI does NOT support the following types of third party fundraising:

1. Programs that raise money on commission.
2. Initiatives that encourage/involve behaviour that is counter to the CMHA mission and/or programmatic activities.
3. Initiatives involving the promotion or support of a political party or candidate or those which appear to endorse a political party or activity.
4. Inappropriate direct solicitation including, but not limited to, door-to-door canvassing, telemarketing or broad-based internet broadcasting.

3.0 CRITERIA & GUIDELINES

The initiatives in section 1.2 are considered “third party” events or campaigns, meaning that CMHA-PEI is not the organizer. Organizers are individuals, organizations or businesses from the community wishing to raise money for CMHA-PEI, but not working for, or directly with CMHA-PEI.

3.1 Criteria

Any individual, organization or business is eligible to fundraise for CMHA-PEI provided that:

- they are not involved in activities that would negatively affect the integrity and reputation of CMHA-PEI; and
- they (individual, organization or business) have never been convicted of a criminal offense which would affect the integrity and reputation of the event, campaign and/or CMHA-PEI.

3.2 Guidelines

When officially associating a fundraising event or campaign with CMHA-PEI, organizers are agreeing to:

1. Assume all liability and accountability for their fundraising event or campaign.
2. Maintain a professional presentation and give CMHA-PEI positive exposure and increased public awareness.
3. Remain “above board” by ensuring that all proper licenses (50/50, liquor) and permissions (road closures) for the event or campaign are obtained.
4. Keep transparent and accurate financial records.
5. Consult with CMHA-PEI and seek approval of all marketing/promotional materials bearing the CMHA logo prior to ordering, printing or distribution.
6. Provide CMHA-PEI with a full list of who sponsors were and the value of their sponsorships.
7. Provide background documentation and criminal record checks if required.
8. Provide notice of the following:
 - a. Other charities that will also benefit from the same fundraising event or campaign;
 - b. the exact % of net proceeds that will be donated to CMHA-PEI; and
 - c. reasonable notice of any cancellations.

4.0 RESPONSIBILITIES

Organizers are responsible for the following:

1. All revenues and expenses. CMHA-PEI will not manage revenues and expenses for a third party initiatives.
2. Any financial loss or unsettled accounts. CMHA-PEI will only deal with final net proceeds as they are donated.
3. Insurance. CMHA-PEI will not underwrite any third party initiative or it’s individual activities.
4. Licenses and fees. CMHA-PEI will not apply or pay for licenses related to the lawful and smooth operation of third party fundraising events or campaigns.

5. Donations and sponsorships. CMHA-PEI will not solicit sponsors on behalf of a third party fundraising event or campaign.
6. Staffing and volunteers. It is the sole responsibility of the organizer to ensure their third party fundraising event or campaign is adequately staffed with the appropriate amount of volunteers and/or staff to ensure a successful outcome.
7. Logistics. CMHA-PEI will not be involved in securing vendors, supplies or the general logistics of third party fundraising events or campaigns.

Third party organizers will NOT name CMHA-PEI in contracts without CMHA-PEI's written consent.

For approved events and campaigns CMHA-PEI will provide the following:

1. Appropriate logos, promotional material and supporting documents for the event or campaign.
2. A review of all marketing/promotional materials prior to dissemination.
3. Promotion plan review with feedback on possible gaps and/or room for improvement.
4. Inclusion in CMHA-PEI's overall promotional plan (mention on web page, social media posts, help getting free media coverage etc..).
5. Links and other direct donation resources if this fits the event/campaign model.
6. Presence for media engagements.
7. A physical presence (booth with literature etc..) and/or presentation at event if required.
8. Copy of any stakeholder reports created during the fiscal year that net proceeds were received.

5.0 OTHER

CMHA-PEI reserves the right to:

- Refuse involvement, and the use of its name and logo, in any event or campaign that does not meet with its expressed approval.
- Relinquish support of any third party event or campaign that does not abide by the policies, criteria, and guidelines set out in this document, without any liability or obligation.

For more information, please contact:

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