



Third Party Fundraising Policy

The purpose of this policy is to provide third party fundraisers and PHA Canada staff with clear guidelines in relation to the organization and promotion of third party events. Third party fundraisers are events voluntarily organized and led by independent individuals, groups, or organizations for the purposes of raising funds for, or on behalf of, PHA Canada. PHA Canada is grateful for the community partners who put on third party community fundraising events for the financial benefit of PHA Canada.

General Guidelines

1. All third party event organizers are encouraged to reach out to PHA Canada early in their planning to discuss their plans, and to seek guidance and support from PHA Canada staff.
2. Third party fundraising events benefiting PHA Canada must reflect PHA Canada's mission, vision, and values (see www.phacanada.ca/en/aboutus/). PHA Canada reserves the right to decline any fundraising proposal that it deems not aligned with these goals. This includes the right to approve any co-beneficiaries of the planned event or to decline any gift that does not align with our mission, vision, and values or established policies and procedures.
3. All third party event organizers will receive a copy of PHA Canada's *Independent Community Event Fundraising Tool Kit (2018)*.

Financial Guidelines

1. Third party fundraising events must be financially self-sustaining without financial contribution or risk from PHA Canada. PHA Canada will only accept the net proceeds from a third party fundraising event. Exceptions may be made on a case-by-case basis for select events where PHA Canada collects all event revenues on behalf of the third party event organizer. All third party fundraising event expenses remain the responsibility of the third party event organizer and must be paid from the net proceeds donated to PHA Canada. Refunds or reimbursements will not be available after proceeds are donated to PHA Canada.
2. Third party event organizers must transparently and truthfully state the portion of the event proceeds that will be donated to PHA Canada in all advertising and promotions, and in all contact with donors, sponsors, participants, and volunteers.
3. The third party event organizer is responsible for all vendor agreements, contracts, insurance, and necessary permits related to the event. PHA Canada will not assume any legal or financial liability for a third party fundraising event.

Brand and Marketing Guidelines

1. PHA Canada will not be considered an organizer or sponsor of any third party fundraising event and should be acknowledged as a "beneficiary" on all event materials.
2. Any use of PHA Canada's name and logo in association with a third party fundraiser must be pre-authorized by PHA Canada. PHA Canada will provide third party event organizers with digital copies of its logo clearly indicating that the event is being held in support of PHA Canada. All event materials containing PHA Canada's name and/or logo must be approved by PHA Canada prior to printing and/or distribution.
3. PHA Canada may provide assistance with advertising and promoting third party fundraisers on a case-by-case basis depending on available staff and financial resources. This may include such assistance as providing access to PHA Canada's online ticketing and donation platforms, designing promotional materials (i.e. posters, postcards, donation cards, etc.), and advertising



PULMONARY HYPERTENSION
ASSOCIATION OF CANADA

L'ASSOCIATION D'HYPERTENSION
PULMONAIRE DU CANADA

events through our website, newsletters, or social media channels. See PHA Canada's *Independent Community Event Fundraising Tool Kit (2018)* for further details.

Charitable Tax Receipting Guidelines

1. PHA Canada will issue tax receipts directly to eligible donors for donations of \$20 CDN or greater.
2. Donations that do not meet CRA regulations will not be tax receipted.
3. Revenues earned directly by a third party event that are not eligible to be tax receipted (i.e. ticket sales, raffles, auctions, etc.) may be used to cover expenses related to the event.
4. For more information on the acceptance and management of gifts, please see PHA Canada's *Gift Acceptance and Donor Directed Gift Policy (2014)*.