



Personal Fundraising Event Planning and Policies

We are thrilled that you have chosen to plan an event in support of your Friends For Life Bike Rally (Bike Rally) fundraising and we're here to support you in planning your event.

We'd be happy to promote your event in the calendar section of the Bike Rally website! As well, PWA may be able to provide you with banners, posters and other PWA material for your event. Please contact PWA to arrange for materials.

We realize that reaching the \$2,500 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.

Outlined below are the policies all Bike Rally participants must follow when planning an event. We would like to ensure you understand both the extent and the limitations of our support for personal fundraising events.

GENERAL EVENT ITEMS

EVENT PLANNING – before you begin detailed planning efforts we suggest that you:

- Check your dates in the bikerally.org calendar and other community calendars for other events.
- Contact PWA Special Events Coordinator at bikerally@pwatoronto.org or 416-506-1400 x238 and discuss your event dates, ideas and details.
- Complete a Fundraising Event Planning Form prior to planning for any event that is larger than a private event ('outside your backyard').
- Please take the time to review these and Personal Fundraising Event FAQs in more detail for events of this size.
- Once completed, submit the Event Planning Form to bikerally@pwatoronto.org or fax 416-506-1404 for review and approval.

EVENT TYPE - PWA seeks to ensure all projects are ethical and compatible with our mission and values. The public perception of the activity must not be injurious to PWA or Bike Rally.

EVENT ATTENDANCE - Decisions around PWA staff, Bike Rally steering committee members and/or volunteers attending an event will be determined at the discretion of the Bike Rally and PWA and will be based on factors such as availability, size and nature of event, etc.

EVENT CANCELLATION - If the event is cancelled, the event organizer agrees to give PWA and the Bike Rally at least one day's notice prior to the event.

PRIZE SOLICITATION - PWA and Bike Rally have developed generous and long-term sponsorship relationships with many corporations (Scotiabank, Out Adventures, Rubbermaid, Sheraton, NOW, to name a few). Please check with Mike Twamley, Director, Philanthropy & Communications at

mtwamley@pwateronto.org or 416-506-1400 x239 prior to approaching any Bike Rally related companies directly.

- On request, PWA can provide you with a prize solicitation letter.
- When approaching prize sponsors always identify yourself as an independent fundraiser and PWA's Friends For Life Bike Rally participant (Rider/Crew)

LEGAL REQUIREMENTS

RESPONSIBILITY - Please note the person responsible for the event must be 19 years of age or older.

LIABILITY - The Bike Rally and PWA assume no legal or financial liability associated with the event. The event organizer will obtain all necessary permits, licenses and insurance. For certain types of events, we may require organizers acquire their own insurance and provide proof if requested. We may also require all participants to sign a liability waiver (provided by PWA).

DAMAGES – The Bike Rally and PWA are not responsible for any damages, accidents to persons or property.

EVENTS WITH ALCOHOL – To ensure the Bike Rally, PWA and the event organizers are protected, event organizers may be asked to provide copies of liquor license numbers for venues and/or special event permits, i.e., Special Occasion Permit (SOP) to PWA. For events at a private home, the homeowner is responsible for any alcohol related liability. PWA will not provide liquor licenses for any event.

GAMING – Gaming and lotteries including bingos, 50/50 draws, gambling, raffles or games of chance often have special considerations that require permits. Please visit the Alcohol and Gaming Commission of Ontario website for more information.

The Alcohol and Gaming Commission of Ontario (AGCO) does not issue licences to individuals. Due to the number of fundraisers involved in the Bike Rally, PWA will not apply for a raffle licence on behalf of an event. You can run a draw without acquiring a licence, but you must offer the tickets for free, asking instead for an optional donation.

FINANCIAL ITEMS

EXPENSES - Event expenses must be paid by the Event Organizer and cannot be deducted from donations to PWA. Under no circumstances is the Bike Rally or PWA able to offer funding or reimbursement for event expenses. Proper records of event expenses and revenue should be kept and available for review on request by PWA or CRA.

FUND SUBMISSION – The Bike Rally and PWA recognize that revenue from an event can be allocated to a participant's Bike Rally fundraising total. To be included in your Bike Rally Fundraising, all funds must be received at PWA by June 30, 2014.

If your event is a group event and benefiting more than one Bike Rally participant please submit to PWA a breakdown of how the revenue is to be allocated to each participant so we can properly update each participant's fundraising records.

If your event does not require tax receipts, funds can be added to your fundraising total through the Personal Fundraising Events section of your On-line Pledge Page. To access this feature, please

log into your On-line Pledge Page and click Personal Fundraising Events under the My Fundraising Menu on the left-hand side.

ON-LINE PLEDGE PAGE – 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.***

USE OF FUNDS - Use of the funds received by PWA from the event will be determined solely by PWA, in accordance with its mission.

TAX RECEIPTS - In accordance with our policy, PWA controls the issuing of tax receipts. PWA must have the opportunity to review and approve any event-related tax receipt requirement in advance of the event, to ensure conformity with Canada Revenue Agency (CRA) regulations. Where a donation is eligible for a tax receipt, the cheque must be made payable directly to Toronto People With AIDS Foundation from the donating corporation or individual.

- PWA does not issue tax receipts for in-kind donations, auction items or event sponsorships.
- Tickets sold for an event where the purchaser receives a benefit (e.g., attending a spinning class, concert, dinner or sporting event) are not eligible for tax receipts.
- Tax receipts cannot be issued for the costs of a donated service. This includes but is not limited to special services that necessitate hiring someone/thing for an event (e.g., tent set-up, website creation, caterer, DJ or entertainment). We can, however, issue a letter to acknowledge the donation.
- Sponsorships are not tax deductible if the sponsor receives any advertising, marketing or promotional value and therefore will not receive a tax receipt. Instead, sponsors can receive a letter of acknowledgement for the value of their sponsorship which can be used against business expenses.
- Gifts of artwork, wine, collectibles, or items of a unique nature must be accompanied by a recent independent appraisal, regardless of value. Gifts of art donated by artists and art dealers are seen as disposition from their inventory.

FINANCIAL CONTROLS - PWA requires that the company/individual/group organizing the event or program is using satisfactory financial controls. The event budget, financial records and bank information for the event must be available to PWA, if requested. The event should be financially viable in the opinion of PWA.

TERMINATION CLAUSE – The Friends for Life Bike Rally and PWA reserve the right to terminate a relationship with an event at any time. Termination will be communicated in writing.

EVENT PROMOTION ITEMS

NAME AND LOGO USAGE – PWA's Friends For Life Bike Rally and PWA logos are property of PWA, you need permission to use them. The Bike Rally Media and Communications Committee and PWA must approve all documents and materials that make visual or verbal reference to the name, logo and/or official marks of the Bike Rally and PWA, in whole or in part, whether intended for print, broadcast, or online media (i.e. websites). This approval must be provided by the Bike Rally Media and Communications Committee and PWA prior to the documents and materials being used publicly, regardless of whether the initiative is internal or external to a group or organization. Approval from us gives you the right to use the Bike Rally and PWA names and logos only as it

relates to your event. 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.

We also reserve the right to revise any HIV/AIDs information within promotional materials to ensure accuracy.

PWA reserves the right to withhold the use of the Bike Rally and PWA names and/or logos from any event and will not assume any costs or liabilities that may be involved in doing so.

POSTERS – To simplify decisions and reduce effort, maintain consistency with all other personal fundraising event posters and to comply with mandatory PWA's Friends for Life Bike Rally branding requirements, we provide fundraising event poster banners for desktop publishing.

Download the appropriate banner image to be applied to the bottom of your poster.

Easy Instructions:

- Be creative and have fun with your poster. That's the main rule.
- Avoid skewing and stretching – scale the Bike Rally banner proportionally.
- Maintain the official banner at the bottom of all poster material ensuring adequate hierarchy for your event/poster purposes.
- Do not alter imagery, wording or layout within the banner. This assists with consistent messaging and visuals for all event fundraising efforts.
- Keep the banner within the trim area of your poster to ensure details don't get cut off.

PHOTOS & VIDEO – We appreciate receiving photos and video from your event. Any event photos submitted may be used to recognize your event and/or promote fundraising activities. By submitting them you are giving full permission for the Bike Rally and PWA to collect, use and disclose the photographs, electronic images and/or video images in any broadcast, telecast and/or written account of the event. Waiver forms for non-participant consent to use pictures/video are available from PWA.

ENDORSEMENT - The Bike Rally and PWA are grateful for the strong support provided by all event participants, their events and their sponsors; however this acknowledgement does not constitute an endorsement of any companies' products or services used in connection with the event.