



**Policy Section 5: FUNDRAISING & DONORS**

**Policy #: 5.4**

**Policy: Third-Party Fundraising**

**Revision: Rev 2**

**Approval: August 10, 2022**

**1. Purpose:**

- 1.1 To provide policy direction regarding third-party fundraising on behalf of The Flower Cart.

**2. Definitions:**

- 2.1 Third-party fundraising is an event or activity conducted by an individual, group, or organization external to The Flower Cart, to solely benefit The Flower Cart, its objectives, and purposes.

**3. Detailed Policy Statement**

- 3.1 The Flower Cart will consider third-party fundraising proposals from external individuals, groups, or organizations.
- 3.2 Third-party fundraising activities must support and be consistent with The Flower Cart values, vision and mission.
- 3.3 The Flower Cart will not incur any expenses related to third-party fundraising activities.
- 3.4 The Flower Cart will not assume any liabilities (legal or financial) regarding third-party fundraising activities.
- 3.5 The Flower Cart will not assume any responsibility for the planning and execution of third-party fundraising activities.
- 3.6 Proposals to The Flower Cart for a third-party fundraising activity will be submitted in writing to the Chief Executive Officer.

- 3.7 Any agreement between The Flower Cart and a third-party regarding a proposed fundraising event/activity will be in writing and will fully describe The Flower Cart requirements, conditions, limitations, and expectations regarding the event/activity.
- 3.8 Promotional material for the event/activity including but not limited to brochures, posters, advertising through social media, print, TV, and radio, will be coordinated with and approved by The Flower Cart.
- 3.9 The Flower Cart will comply with all regulatory and statutory requirements related to fundraising events/activities.
- 3.10 The Flower Cart will lend its name, logo, and other identifiers to a proposed activity/event only when there is agreement between The Flower Cart and third-party fundraiser to do so.
- 3.11 The Flower Cart will assign members of its staff to a third-party fundraising event by exception only and if there is agreement to do so by all parties concerned.
- 3.12 The Flower Cart will not release donor contact lists or any other information regarding The Flower Cart donors to a third-party.
- 3.13 The Flower Cart reserves the right to withdraw from an agreement with third-party organizers if terms of the agreement are violated.

#### **4. Implementation:**

- 4.1 A proposal for a third-party fundraising activity/event will be assessed to determine:
  - 4.1.1 if the activity/event is consistent with The Flower Cart's values, vision and mission;
  - 4.1.2 the likelihood of third-party organizers successfully delivering on all aspects of the activity/event;
  - 4.1.3 potential profitability and public relations benefit; and
  - 4.1.4 the potential for conflict with other planned Flower Cart activities or events.
- 4.2 The Flower Cart will ask third-party organizers for proof of liability insurance to cover a proposed activity/event.
- 4.3 The Flower Cart will ensure that third-party organizers assume responsibility for acquiring permits, licenses, and the payment of all fees regarding the activity/event.

- 4.4 The Flower Cart will issue income-tax receipts as required and in accordance with its Gift Acceptance Policy.
- 4.5 The Flower Cart and third-party organizers will coordinate the details of documentation and financial reporting including the remittance of net proceeds from the fundraising event in the timeframe agreed to by the parties to the event.
- 4.6 Promotional activity will be coordinated with third-party organizers and approved by Flower Cart.
- 4.7 The Flower Cart may provide promotional material to the activity/event as agreed with third-party organizers.
- 4.8 The Flower Cart may support third-party activities/events on its website and social media as appropriate.
- 4.9 The Flower Cart will not permit third-party organizers to enter into agreements/arrangements on its behalf with other groups, individuals, or organizations.
- 4.10 The Flower Cart will ensure that third-party organizers represent themselves accurately and correctly at all times and not as Flower Cart representatives.

**5. Applicability:**

- 5.1 Board of Directors
- 5.2 The Chief Executive Officer

**6. Policy Authority:**

- 6.1 Board of Directors

**7. Related Policies, Procedures and Documents:**

- 7.1 Policy 1.6 – Risk Management Policy
- 7.2 Policy 2.3 – Conflict of Interest
- 7.3 Policy 2.6.4 – Terms of Reference for Budget and Finance Committee
- 7.4 Policy 5.1 – Gift Acceptance
- 7.5 Policy 5.2 – Donor Recognition

7.6 Policy 5.3 – Fundraising

7.7 A Donor Bill of Rights

7.8 The Flower Cart By-Laws

7.9 The Flower Cart Risk Management Plan

7.10 The Flower Cart Third-Party Fundraising Handbook

**8. Record of Amendments:**

<b>Revision #</b>	<b>Summary of Revision</b>	<b>Date Approved</b>
Rev 0	Original Issue	February 27, 2018
Rev 1	Reviewed and Updated	July 07, 2021
Rev 2	Changed Executive Director to Chief Executive Officer	August 10, 2022