



The University of Western Ontario

Third-Party Fundraising Statement of Intent

Prior to filling out the application below please review the criteria that must be met if the expectation is to issue charitable tax receipts in conjunction with a fundraising event.

- The request is under the full knowledge and support of the Dean or Department/Faculty that will be benefiting from the event.
- The event must be in keeping with the University’s reputation and public perception.
- All generated revenue must be consistent with Western’s priorities and purposes.
- All event organizers must maintain proper accounting records and be accountable to the Department of Advancement Services and provide all relevant information in a timely and complete manner.

Please visit Policy 2.27 (<http://www.uwo.ca/univsec/mapp/section2/mapp227.pdf>) for a more detailed report on The University’s Policies and Procedures for third party fundraising. Events that have not been approved will be considered net proceeds only and a business receipt will be issued.

Today’s Date: _____

Contact Information

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone: _____ Email: _____

Organization/Committee You represent

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone: _____ Email: _____

Name of Faculty/Department Advisor: _____

Event Details

Name of Event: _____ Date: _____ Time: _____

Location/Venue: _____ Address: _____ City: _____ Prov: _____



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Organization and Event/Campaign Profile

	Please answer in point form. Thank you.	For Advancement Services use only.
What is your group or organization's mission or the nature of your business?		
Is this fundraising initiative approved by a faculty, department or unit?		
How long has your organization, committee or group been active?		
How many members do you have?		
What type of fundraising event do you propose to do to benefit Western? If not fundraising, what is the purpose of your event?		
Expected number of participants?		



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Organization and Event/Campaign Profile (continued)

	Please answer in point form. Thank you.	For Advancement Services use only.
Description of how revenue will be generated.		
Does your event require that you obtain any licences or permits? Please provide listing of all with brief description of their purpose.		
What is your marketing plan for this fundraiser?		
Describe promotion plan - radio, tv, word of mouth, posters or flyers, consumer marketing, advertising.		
<p>How will Western's name be used? Please provide details regarding where the name or references to Western will appear in printed materials, on display materials or in speeches.</p> <p>Please note Western's name may not be used in public releases until the copy for such releases has been approved by Western.</p>		



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Organization and Event/Campaign Profile (continued)

	Please answer in point form. Thank you.	For Advancement Services use only.
Financial Forecast and Reporting - How much do you expect to raise from this event or campaign? Projected expenses? (attach budget worksheet)		
How will the funds be remitted to Western - credit card, cheque payable to Western?		
Expected remittance date to Western? All funds should be remitted to Western within 30 days of the event.		

Revenue Canada Guidelines Re: Tax receipts for donations:

Gifts that are receiptable:

Direct cash, cheque and credit card donations are receiptable in the tax year in which they are received. Sponsorship donations are receipted under the same guidelines as direct cash and cheque donations.

Not receiptable:

Auctions, raffles of goods and services, donation of business or personal services, gifts where the donor has received some form of material or service incentive to give, donations combined with raffles or door prizes, corporate event sponsors who receive more than minor recognition or promotional value.

Partially receiptable:

Admission cost to a meal or event where the admission includes a donation.

I hereby certify that the information on this form is true and acknowledge that I have read and agree to the Guidelines for Third Party Events.

Furthermore, I declare that I am an authorized representative of: _____ (organization or businessname).

Signature: _____ Date: _____

Approved by Faculty Advisor/Dean/Budget Unit:

Signature: _____ Date: _____

The University of Western Ontario
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Email: cthody@uwo.ca