



**LA FONDATION ÉDUCATIONNELLE SOCRATE  
THE SOCRATES EDUCATIONAL FOUNDATION  
ΕΚΠΑΙΔΕΥΤΙΚΟ ΙΔΡΥΜΑ ΣΩΚΡΑΤΗΣ**

## **Third Party Event Policies & Guidelines**

### **Permission**

The Socrates Educational Foundation retains a fiduciary responsibility to ensure that the Socrates Educational Foundation's name is used properly; that the funds are being handled and accounted for in a responsible manner and the fundraising is conducted in a manner consistent with its mission

- All fundraising events benefiting The Socrates Educational Foundation require written permission from the Foundation office in advance. Public announcements and/or event promotion may not be initiated until event organizers have received written approval.
- Fundraising events must comply with all relevant provincial and federal laws.
- The Socrates Educational Foundation reserves the right to decline any underwriting and/or sponsorship when it believes the association may have a negative effect on the credibility of the Foundation.

### **Event Promotion and Logo Usage**

- The Socrates Educational Foundation must review and approve all promotional materials including, but not limited to press releases, public service announcements, posters, brochures, and advertising prior to production or distribution.
- The Socrates Educational Foundation logo is the property of Socrates Educational Foundation and cannot legally be reproduced without written permission.
- When beneficiary status of an event is shared between Socrates Educational Foundation and other organizations, The Socrates Educational Foundation must have the opportunity to approve beneficiary status for any fundraising initiative or event. All beneficiaries of an event should be listed on invitations, promotional items and press releases.
- The Socrates Educational Foundation may promote the event, when appropriate, through:
  - The Socrates Educational Foundation website's calendar (with a link to the event's/organization's website if appropriate)
  - The Socrates Educational Foundation's Facebook page (with a link to the event's/organization's website if appropriate)
  - Acknowledgment or publication in any newsletter.



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**Event Language**

- Any promotional materials must state clearly that the event is raising funds to benefit The Socrates Educational Foundation.
- The Socrates Educational Foundation's name may not be listed as partner, sponsor, or supporter of the third-party event or its organizers.
- In naming the event/promotion, The Socrates Educational Foundation may not be used in the title, but may be listed as the beneficiary of the event. For example, organizers may not refer to the event as the "The Socrates Educational Foundation Marathon." Instead, it could be promoted as "Marathon to benefit The Socrates Educational Foundation."

**Financial Guidelines**

- The Socrates Educational Foundation requires that expenses related to the event be less than thirty-five percent (35%) of the total amount raised, excluding in-kind donations. Reasonable exceptions may be made on a case-by-case basis.
- Estimated expenses and revenue must be established by the event organizer and submitted to The Socrates Educational Foundation on the Third Party Events Proposal Form (enclosed) for review at least 30 days before the event.
- If event expenses are greater than the total collected, the group conducting the event is responsible for payment of these additional expenses.
- The Socrates Educational Foundation's sales tax-exemption (on purchases) cannot be extended to any third party event or fundraising effort.
- The Socrates Educational Foundation cannot process any credit cards for third party events whose projected net revenues are less than \$10,000.
- The Socrates Educational Foundation is authorized to have complete access to all fundraising activities executed by third parties who claim to benefit The Socrates Educational Foundation. The Socrates Educational Foundation is authorized to audit such records at the completion of the fundraiser or at any time during the fundraising activity as deemed necessary by the Director of Finance. Under no circumstances may an individual keep any portion of the proceeds as profit or compensation for organizing the event.
- The net proceeds of the event must be submitted to The Socrates Educational Foundation within 30 days after the completion of the event.



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### **Sponsorship**

- The Socrates Educational Foundation cannot solicit sponsors for third party fundraising events and does not provide any donor contact information.

### **In-Kind Sponsorship**

- In-kind sponsorship is defined as the donation of a product or service that carries no expense such as a silent auction item or printing.
- The Socrates Educational Foundation cannot solicit in-kind sponsors for third party fundraising events.
- The value of in-kind sponsors/donations must not be included in total event revenue, but should be acknowledged by the event coordinators.
- The Socrates Educational Foundation will not receipt in-kind donations for third party fundraising initiatives.

### **Tax Receipts and Donor Acknowledgements**

- For tax reasons, The Socrates Educational Foundation can only acknowledge direct gifts. If the participants of a third party event want to be acknowledged by The Socrates Educational Foundation for their donation, they **MUST** donate directly to The Socrates Educational Foundation
- Charitable receipts will be provided by The Socrates Educational Foundation only with prior agreement, and will reflect only the charitable portion of a contribution as applicable by Canada Revenue Agency guidelines.

### **Cancellation, Liability & Changes**

- If circumstances warrant, The Socrates Educational Foundation may at any time through any of its directors, officers, or senior administrators, instruct the cancellation of any third party event. By executing the third party event agreement, events Organizers agree to release The Socrates Educational Foundation, and its officers, directors, and employees from any and all liability and connection to such action.
- The sponsors agree to indemnify and hold harmless The Socrates Educational Foundation and all its officers, directors, and employees from any and all claims and liabilities in any way related to the event.



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- The Socrates Educational Foundation must be informed of any changes to third party fundraising events.

**How The Socrates Educational Foundation can help:**

- Offer advice and expertise on event planning.
- Help event organizers determine how to direct the gift for our schools.
- Promote the event on the Foundation website events calendar.
- Acknowledge direct contributions to The Socrates Educational Foundation. These contributions will be added to the event donation total, but cannot be withdrawn for event expenses.
- Approve the use of The Socrates Educational Foundation name and/or logo.
- Provide a letter of authorization to validate the authenticity of the event and its organizers.
- Acknowledge the event's donation by publishing the event name, event description, locations and contact information.

**The Socrates Educational Foundation may not:**

(We state this information in advance so there are no disappointments or misunderstandings with regard to our ability to participate and support the fundraising event):

- Provide employees or volunteer support for the event.
- Promote, publicize or actively participate in the sale of tickets.
- Provide the Foundation's tax exemption number.
- Provide funding or reimbursement for expenses.
- Provide mailing lists of donors, vendors, board members, staff members, employees and other constituencies.
- Provide The Socrates Educational Foundation stationery.



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- Post or distribute promotional materials through the schools.
- Provide publicity.

For events raising more than \$10,000 annually, The Socrates Educational Foundation can provide these additional benefits:

- Foundation representative as guest speaker at event
- Testimonial speaker or story
- Publicity in Foundation publications and/or website