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| <b>Parent Policy:</b>  | Third Party Events |
| <b>Effective Date:</b> | April 2021         |
| <b>Revised Date:</b>   | April 2021         |
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## Third Party Event Package Information, Guidelines, Agreement & Application

Thank you for your interest in supporting The Women's Interval Home of Sarnia-Lambton Inc. (WIH) by planning a third-party event! Community support is the key to our success, and we recognize the effort it takes to organize and hold an event on our behalf.

In order to help your event run more smoothly, we have created third party event information and guidelines for fundraising events held on behalf of WIH.

### What is a Third-Party Event?

A third-party event is one that is organized by an individual, affiliated group or organization, for the purpose of raising funds for — or on behalf of — a chosen charity with that charity's approval.

The Women's Interval Home benefits from third party events by:

- Raising awareness on domestic violence and family violence
- Receiving financial support from event net revenues for shelter needs and programs.

You can help the Women's Interval Home in these ways by hosting your own event!

### Getting Started

If you are interested in running a Third-Party Event to benefit the Women's Interval Home, please follow the steps below:

1. Carefully read through Third Party Fundraising Guidelines & How We Can Support Your Event
2. Complete and submit to us the Third-Party Waiver and Liability Release Agreement as well as the Application Form
3. Wait until you receive approval from us.
4. Submit your Financial Summary Form and the funds you raised for us no later than 30 days after your event.



## How We Can Support Your Event

The Women's Interval Home CAN:

- ✓ Offer an online fundraising page for the event.
- ✓ Offer advice on how to organize the event.
- ✓ Help promote the event by posting on its social media platforms (Facebook, Instagram, Twitter).
- ✓ Send a Women's Interval Home representative to attend the event, if available.
- ✓ Issue tax receipts, subject to Canada Revenue Guidelines.
- ✓ Authorize the use of its name and logo for promotion or for use at the event.
- ✓ Provide you with a Letter of Support that validates your event.

The Women's Interval Home CANNOT:

- ✗ Fund or reimburse any event expenses
- ✗ Provide donor or sponsor lists
- ✗ Guarantee attendance of staff or volunteers at the event.
- ✗ Solicit individuals or companies to acquire donations or sponsorship for auctions or raffles. The event organizer is responsible for any canvassing.
- ✗ Apply for gaming licenses (e.g. bingo, raffles, liquor, insurance) for the event.
- ✗ Provide tax receipts for cash or in-kind goods that were not directly received by the Women's Interval Home office.



## Third Party Fundraising Guidelines

We ask that you read these guidelines carefully before proceeding with your plan. Approval will be granted on per event/promotional basis. Applicants must reapply annually for approval.

If you have any questions, please contact our fundraising coordinator Kyla Goodhand at 519-336-5300 ext #235

### **The Women's Interval Home does NOT permit the following types of fundraisers in a third-party context:**

- ✘ Programs that raise money on commission.
- ✘ Events that do not comply with the Women's Interval Home mission and/or program activities.
- ✘ Events that involve the promotion or support of a political party or candidate, or those which appear to endorse a political activity.
- ✘ Direct solicitation (including but not limited to door-to-door canvassing, telemarketing or internet).

### **What the Women's Interval Home requests of third-party fundraisers:**

- Please register new initiatives or update us on continuing events or promotions. It is important that our office is aware of all initiatives that are held in support of our programs.
- It is the organizer's responsibility to communicate to sponsors, participants, and the general public that the Women's Interval Home is not conducting the event or promotion but is the beneficiary.

### **Guidelines:**

- All publicity (including media releases, print/promotional materials, etc.) for the proposed event or promotion must be approved by the Women's Interval Home prior to being printed, released, etc.
- The Women's Interval Home name and logo may not be used by a third party on an ongoing basis (e.g. on a website or on promotional material), unless permission in writing has been granted to the third party by the Women's Interval Home.
- Mention of the Women's Interval Home in connection with the promotion and funds raised must be approved by the Women's Interval Home. Generally, the approved wording is "Proceeds from this initiative will be donated to the Women's Interval Home."
- The public should be informed how the Women's Interval Home will benefit from the event or promotion. If the Women's Interval Home will not receive all the proceeds, then the exact percentage that benefits the Women's Interval Home must be stated clearly on all related materials.
- The Women's Interval Home must be notified if other organizations will benefit from the event or promotion.



- The Third-Party Organizer will obtain all necessary permits, licenses and insurance required.
- All funds and tax receipt information (if approved to issue receipts) i.e. contact information for receipting, must be received by the Women's Interval Home no later than 30 days after closing the event or promotion.
- It is recommended that the third-party organizer make themselves familiar with the receipting policies of the Canada Revenue Agency (CRA): <http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>
- If the event or promotion is cancelled, the Women's Interval Home must be given at least 24 hours' notice. Please try to return to us all unused Women's Interval Home materials.
- The Women's Interval Home shall have the right at any time and for any reason to request that the Third Party Organizer cease use of the name of the Women's Interval Home in connection with the event or promotion and the Third Party Organizer must comply with such request.
- The Women's Interval Home will not assume any legal or financial liability at an event or in conjunction with a promotion.
- The Society is not responsible for any damage, accidents to persons or property at an event.

## Tax Receipt Guidelines

- The Women's Interval Home is only permitted to issue tax receipts to individuals who make a donation without receiving a tangible item or benefit in return.
- The Women's Interval Home can only issue tax receipts for the amount of the actual donations received by the Women's Interval Home.
- Tax receipts cannot be issued for funds used to cover the costs of the event or other administrative expenses incurred by the Third-Party Organizer.
- Tax receipts will be issued by the Women's Interval Home once net funds are remitted with a list of donor names, addresses and amounts of individual donations.

<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>



## Third Party Waiver and Liability Release Agreement

Thank you for your support of the Women's Interval Home through your involvement and planning of a third party event.

By signing this form, you agree and understand that:

- a. The business/organization/individual will not open any bank accounts using the Women's Interval Home name. Any check donations listing the Women's Interval Home as "Payee" will be forwarded to the Home for deposit in a Women's Interval Home bank account.
- b. Only donations made directly to the Women's Interval Home are tax receiptable (to the extent permitted by law). It is recommended that the event organizer makes themselves familiar with the receipting policies of the Canada Revenue Agency (CRA)  
  
<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>
- c. All publicity (including media releases, print/promotional materials, etc.) for the proposed event must be approved by the Women's Interval Home prior to being printed, released, etc.
- d. Mention of the Women's Interval Home in connection with the initiatives and funds raised must be approved by the Alzheimer Society. Generally, the approved wording is "Proceeds from this initiative will be donated to the Women's Interval Home."
- e. Any use of the Women's Interval Home's name, logo, or stationary in any mailing, advertising, or for the media must receive prior written approval from the Women's Interval Home.
- f. Due to limited personnel resources, the Women's Interval Home cannot guarantee staff support to third party events or initiatives.
- g. The Women's Interval Home must be notified if other organizations will benefit from the initiative.
- h. The Women's Interval Home shall have the right at any time and for any reason to request that the Third-Party cease use of the name of the Women's Interval Home in connection with the initiative and the Third Party must comply with such request.
- i. All fundraising is to be conducted for the exclusive benefit of the Women's Interval Home. Any variance must be approved by the Women's Interval Home in advance of the initiative.
- j. The Society does not release volunteer, partner or donor names.
- k. All third-party organizers are responsible for providing insurance as required by law, or established business practice.
- l. The Women's Interval Home will not assume any legal or financial liability of a third-party initiative. The Women's Interval Home is not responsible for any damage, accidents to persons or property at a community event or any actions in association with the fundraising initiative.



- m. The Women's Interval Home in no way endorses any products or services used in connection with the event.
- n. This event in no way represents a joint venture or partnership. All proposals for cause marketing must be accompanied by a full business plan.

I individually, or as a representative of the below named business, organization or group agree to the above requirements and hereby fully release and agree to hold harmless the Women's Interval Home of Sarnia-Lambton Inc. and all local affiliates: Directors, Trustees, employees and representatives, successors and entities, together with their insurers, of and from any and all liability, claims, damages, expenses, injury or causes of action for any reason.

DATED THIS: \_\_\_\_\_ OF \_\_\_\_\_, \_\_\_\_\_  
Day Month Year

\_\_\_\_\_  
Name(s) of Organizer(s)

\_\_\_\_\_  
Signature(s) of Organizer(s) Date

\_\_\_\_\_  
Signature of Women's Interval Home Representative Date

Please complete, sign and return this form to:

Kyla Goodhand  
Fundraising & Marketing Coordinator  
kyla@womensintervalhome.com  
The Women's Interval Home Sarnia-Lambton  
681 Oxford St,  
Sarnia, ON N7T 6Z7  
Phone: 519-336-5200 ext #235



## Application Form

Thank you for your support of the Women's Interval Home through your involvement and planning of a third party fundraising event.

Please complete this form to the best of your abilities. Then sign and return to:

Kyla Goodhand  
Fundraising & Marketing Coordinator  
kyla@womensintervalhome.com  
The Women's Interval Home Sarnia-Lambton  
681 Oxford St,  
Sarnia, ON N7T 6Z7  
Phone: 519-336-5200 ext #235

**This application must be approved by the Women's Interval Home prior to publicizing your third party event in support of the Women's Interval Home.**

### THIRD PARTY ORGANIZER INFORMATION:

Contact Name:

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Group/Organization:

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Address:

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Phone Number:

Fax Number:

Email Address:

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**EVENT INFORMATION:**

Event Name:

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Event Date/Time:

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Event Location:

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Estimated number of participants:

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Is this the first time you've held this event?     Yes             No

Will this be an annual event?                       Yes             No             Do not know

**EVENT DESCRIPTION:**

Briefly describe the event or promotion and how the funds will be raised. Describe your target audience, expected attendance and how you plan to advertise. (Please use a separate sheet if necessary).

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**LICENCES:**

Does your event or promotion require a license?       Yes       No       Do not know

Please note that the Alcohol and Gaming Commission of Ontario (AGCO) requires you to obtain licenses in accordance with its legislated acts, such as the Gaming Control Act and the Liquor License Act.

A license is required for, but not limited to:

- 50/50 draws
- Alcohol Permits
- Bingos
- Monte Carlos/Casinos
- Raffles

Please allow sufficient time to obtain necessary licensing, as it falls under the Third-Party organizers responsibility.

**EVENT EXPENSES:**

Please provide an estimate of the costs associated with your event.

| <i>Item (e.g. venue rental, food, liquor licence etc.)</i> | <i>Estimated Expenses</i> |
|--|---------------------------|
| 1.   |                           |
| 2.   |                           |
| 3.   |                           |
| 4.   |                           |
| 5.   |                           |
| 6.   |                           |
| 7.   |                           |
| 8.   |                           |
| 9.   |                           |
| 10.  |                           |
| <b>TOTAL ESTIMATED EXPENSES:</b>                           |                           |



## FINANCIAL PROJECTIONS

Estimated income from the event: \$ \_\_\_\_\_

Estimated expenses from the event: - \$ \_\_\_\_\_

Estimated proceeds to the Women's Interval Home: = \$ \_\_\_\_\_

**NOTE:** All event expenses must either be paid directly by the organizer or come out of the event proceeds.

## PROMOTION

Do you require the use of the Women's Interval Home name and/or logo for promotional use?

No       Yes – if yes, please elaborate: \_\_\_\_\_

Do you require an online fundraising tool to collect donations for your event?

No       Yes

Do you need the Women's Interval Home promotional materials for your event?

No       Yes – If yes, how many? \_\_\_\_\_

Do you require a Letter of Support that validates authenticity of the event?

No       Yes

Do you require a Women's Interval Home representative to attend your event? (We will do our best to accommodate).

No       Yes



**COMMUNICATION PLAN**

Please detail your communications plan and where and when you will be using the Women's Interval Home logo, name or other property belonging to the Women's Interval Home.

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**WHY DID YOU CHOOSE US?**

What made you choose the Women's Interval Home as the benefactor for your fundraising initiative?

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**PLEASE SIGN & DATE**

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Signature(s) of Organizer(s)

Date



## FINANCIAL SUMMARY FORM

Thank you for supporting the Women's Interval Home! Once your event is finished, please complete the form below and attach all funds for submission.

Event Name:

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Event Organizer:

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Contact Info:

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Phone

Email

### NET REVENUE SUMMARY

Cash/cheque donations (receiptable) \$ \_\_\_\_\_

Non-receiptable donations (e.g. ticket sales, auction, raffle) + \$ \_\_\_\_\_

Subtotal \$ \_\_\_\_\_

Total Expenses - \$ \_\_\_\_\_

Net Revenue \$ \_\_\_\_\_

**NOTE:** All event expenses must either be paid directly by the organizer or come out of the event proceeds.

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Signature

Date