



third party fundraising handbook

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Introduction

First and foremost, thank you so much for your interest in supporting Comox Valley Hospice Society (CVHS) by planning a third party event! Your support helps us meet our purpose of easing the journey of dying and grieving for those in the Comox Valley. Our work ensures that when an illness occurs or someone in our community is dying, they will experience dignity and peace, their caregivers will receive the help they need, and they and their families will be supported in their grief.

Please note that all events must comply with [Provincial Health Orders](#) in place when the event will be held and any other provincial regulations that apply to the event.

This manual is designed to help you organize a successful and enjoyable event and it comes with helpful tools such as fundraising ideas, guidelines and a checklist. Please contact us before you invest a lot of time preplanning your event so we can do a preliminary assessment as to whether your event is likely to be approved. Checking in with us can save you lots of time and we can answer any questions you might have about hosting a third party event for CVHS. We also need to have sufficient time to approve any promotional materials. Please direct your inquiries to:

Monique Thompson
Office Manager
admin@comoxhospice.com
102-1509 Cliffe Avenue
Courtenay, BC V9N 2K6

What is a Third Party Event?

A third party event is one that is organized and carried out by an individual, group, organization or business for the purpose of raising funds for – or on behalf of – a chosen charity with the charity's approval.

The Comox Valley Hospice Society benefits from third party events because they:

- Raise awareness about hospice palliative care and the services CVHS offers to those who are dying, their caregivers and those

anticipating grief or grieving the loss of a loved one.

- Help people understand that while death and dying are a normal part of living, having CVHS staff and volunteers accompany individuals and families on their unique end of life journey can help prepare families for the expected and the unexpected.
- Provide financial support from event net revenues that help CVHS maintain vital programs and initiatives.

You can help Comox Valley Hospice Society in some or all of these ways by hosting your own event! Please read through this handbook to learn more about how you might help the Comox Valley Hospice Society by hosting your own third party event.

Getting Started

If you are interested in running a third party event in benefit of the Comox Valley Hospice Society, please follow these steps.

1. Carefully read through this handbook so you understand everything that is involved in undertaking a third party event and **what kind of assistance CVHS can (and cannot) provide** (pages 6-7.)
2. Before completing the application and agreement, **contact us by email – admin@comoxhospice.com – to let us know what you are planning and when you would like to host your event** so we can advise you as to whether the event is consistent with our mission and values AND whether the date/time frame works for us. Comox Valley Hospice Society will not approve events that would negatively impact ongoing critical priorities or other events or initiatives the Society is planning.
3. Once you receive an email confirmation from CVHS that you can proceed, complete and submit to us the **Third Party Waiver and Liability Release Agreement** (pages 8-10) as well as the **Application Form** (pages 11-16).
4. Wait until you receive our approval form before you do any additional planning.
5. Once you have the approval, use the **Event Planning Checklist** (page 24-25) to help you plan and run the event.
6. Submit to CVHS your **Financial Summary Form** (page 16) and the funds you raised for us ***no later than 30 days after*** your event.

How CVHS Can Support Your Event

The Comox Valley Hospice Society **CAN**:

- ✓ Offer you an online fundraising page for your event. The money donated through this page goes directly to CVHS and donors will receive a tax receipt from CVHS for the full amount of their donation. Organizer expenses cannot be applied against these online donations.
- ✓ Offer you advice on how to organize your event. Direct any questions about the event to us at admin@comoshospice.com.
- ✓ Help you promote your event by posting on our website and on our Facebook page.
- ✓ Send a Comox Valley Hospice Society representative to attend your event, if someone is available.
- ✓ Provide you with a letter of support for the event that you can use to approach potential sponsors for sponsorships and/or donations of auction items.
- ✓ Provide you with Comox Valley Hospice Society marketing materials such as brochures and posters. Please give us at least one month's prior notice before your event to allow us time to get everything organized.
- ✓ Issue tax receipts subject to Canada Revenue guidelines.
- ✓ Authorize the use of the Comox Valley Hospice Society name and logo at your fundraising event.

The Comox Valley Hospice Society **CANNOT**:

Fund or reimburse any event expenses. All costs incurred before, during and after the event will be at the organizer's expense. This is critically important for organizers to know in case the event is cancelled or does not generate enough revenue to cover the expenses associated with the event.

Provide Comox Valley Hospice Society member, volunteer, donor or sponsor lists.

Guarantee attendance of staff or volunteers at your event.

Solicit individuals, organizations or companies to acquire donations or sponsorships for auctions or raffles. The event organizer is responsible for this kind of canvassing.

If your event involves raffles, bingos, poker, social occasion casinos, and wheels of fortune, [you will need to apply for a gaming license](#).

Apply for insurance for your event – sometimes the venue can cover you temporarily under their insurance for a fee. Otherwise, you will need to arrange for private insurance.

If you intend to have liquor, you will need [a liquor license](#).

Provide tax receipts for cash or in-kind goods that were not directly received by the Comox Valley Hospice Society office (please also see information on tax receipts).

Third Party Waiver and Liability Release Agreement

Thank you for your support of the Comox Valley Hospice Society through your planning of a Third Party Event.

By signing this form, you agree and understand that:

1. The business/organization/individual will not open any bank accounts using the Comox Valley Hospice Society's name or Charitable Tax Number. Any cheque donations listing Comox Valley Hospice Society as "Payee" will be forwarded to the Society for deposit in the Society's bank account.
2. Only donations made directly to the Society are issued tax receipts and only as long as they meet Canada Revenue Agency (CRA) requirements. It is recommended that the event organizer make themselves familiar with the receipting policies of the CRA.
<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>
3. All publicity (including media releases, print/promotional materials, etc.) for the proposed event must be approved by the Comox Valley Hospice Society prior to being printed, released, etc.
4. Mention of the Comox Valley Hospice Society in connection with the initiatives and funds raised must be approved by the Comox Valley Hospice Society. Generally, the approved wording is "Proceeds from this initiative will be donated to the Comox Valley Hospice Society."
5. Any use of the Society's name, logo or stationery in any mailing, advertising or for the media must receive prior written approval from the Society.
6. Due to limited personnel resources, the Society cannot guarantee staff support to Third Party Events or initiatives.
7. All fundraising is to be conducted for the exclusive benefit of the Society. Any variance must be approved by the Society. If an organization other than the Comox Valley Hospice Society will benefit from the fundraiser, that must be clearly stated on the application form.

8. The Comox Valley Hospice Society shall have the right at any time and for any reason to request that the Third Party cease use of the name of the Comox Valley Hospice Society in connection with the initiative and the Third Party must comply immediately with such request.
9. The Society does not release member, volunteer, sponsor or donor names.
10. Third Party organizers are responsible for providing insurance as required by law or established business practice.
11. Comox Valley Hospice Society will not assume any legal or financial liability for a third party initiative. The Society is not responsible for any damage, accidents to persons or property at a community event or any actions in association with the fundraising initiative.
12. Comox Valley Hospice Society in no way endorses any products or services used in connection with the event.
13. The 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 release and hold harmless the Comox Valley Hospice Society, its Officers, Directors, agents, employees and representative, 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** _____, **2021**
Day Month

Name(s) of Organizer(s)

Signature(s) of Organizer(s) Date

Signature of Comox Valley Hospice Society Representative

Date

Please complete, sign and return this form to:

Monique Thompson

Office Manager

admin@comoxhospice.com

102-1509 Cliffe Avenue

Courtenay, BC V9N 2K6

Thank you for your support!

Application Form

Thank you for your support of the Comox Valley Hospice Society through your involvement and planning of a third party fundraising event.

Please complete this form to the best of your ability and then sign and return it to:

Monique Thompson
Office Manager
admin@comoxhospice.com
102-1509 Cliffe Avenue
Courtenay, BC V9N 2K6

Phone: 250-339-5533



This application must be approved by the Comox Valley Hospice Society prior to publicizing your third party event in support of the Comox Valley Hospice Society.

1. THIRD PARTY ORGANIZER INFORMATION

Contact Name: _____

Group/Organization: _____

Address: _____

Street

City

Province

Postal Code

Phone Number: _____

Fax Number: _____

Email Address: _____

4. LICENSES

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

Please note that the [BC Community Gaming Branch issues licenses](#). It is recommended that you allow at least 12 weeks to process applications. *This is your responsibility as the Third Party organizer.*

5. EVENT EXPENSES

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

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

6. FINANCIAL PROJECTIONS

Estimated income from the event: \$ _____

Estimated expenses from the event: — \$ _____

Estimated donation to the Comox Valley Hospice Society: = \$ _____

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

For help in budgeting for your event, see **the Sample Event Budget Sheet** (page 20).

7. PROMOTION

Do you require use of the Comox Valley Hospice Society name and/or logo for promotional use?

No Yes — *If yes, please elaborate:* _____

Do you require an online fundraising page to collect donation for your event?

No Yes

Do you need Comox Valley Hospice Society promotional materials for your event?

No Yes — *If yes, how many?* _____

Do you require a Letter of Support (page 21) that validates the authenticity of the event? No Yes

Do you require a Comox Valley Hospice Society representative to attend your event? (We do our best of accommodate your request.)

No Yes

8. COMMUNICATION PLAN

Please detail your communication plan and where and when you will be using the Comox Valley Hospice Society logo, name and other property belonging to the Society.

9. WHY DID YOU CHOOSE CVHS?

What made you choose the Comox Valley Hospice Society as the beneficiary of your fundraising initiative?

10. PLEASE SIGN & DATE

Signature(s) of Organizer(s) Date

Financial Summary Form

Thank you for supporting the Comox Valley Hospice Society! Once you have finished your event, complete this form, submit and attach all funds raised.



Please complete and submit this form *no later than 30 days* after your event. Contact us to arrange a drop-off of the funds raised.

Event Name: _____

Event Organizer: _____

Contact Info: _____
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. For help in budgeting your event, please see **Sample Event Budget Sheet** (page 17) .

Name (please print): _____

Signature: _____ Date: _____

Third Party Fundraising Guidelines

Thank you for choosing the Comox Valley Hospice Society as a beneficiary of your third party event. These types of initiatives are key to our success and we recognize the effort it takes to organize and execute events and/or promotions.

To help your event or promotion run smoothly, we have created these guidelines for a fundraiser held on behalf of the Comox Valley Hospice Society. We ask that you read the guidelines carefully before proceeding with your plan. Approval will be granted on a per event/promotional basis. If you plan for this to be an annual event, you must reapply each year for approval.

If you have any questions, please contact our Office Manager Monique Thompson at admin@comoxhospice.com or 250-339-5533.

The Society 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 Comox Valley Hospice Society's mission, values and programs.

Events that involve the promotion or support of a political party or candidate, or those which appear to endorse a political or partisan activity.

Direct solicitation including but not limited to door-to-door canvassing and telemarketing.

What the Comox Valley Hospice Society requests of Third Party fundraisers:

- Please register a new initiative 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 Society 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 Society prior to

being printed/released.

- The Comox Valley Hospice Society 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 Society.
- Mention of the Comox Valley Hospice Society in connection with the promotion and funds raised must be approved by the Society. Generally, the approved wording is “All proceeds from this initiative will be donated to the Comox Valley Hospice Society.”
- The public should be informed how the Comox Valley Hospice Society will benefit from the event or promotion. If the Society will not receive all of the proceeds, then the exact percentage that benefits the Society must be stated clearly on all materials/communications.
- The Comox Valley Hospice Society 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 tax receipting information (if approved to issue receipts) must include complete contact information (name, address, email, phone number, verified donation amount) and must be received by the Society no later than 30 days after the close of 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 organizer must be given at least 24 hours' notice. Please return any unused materials to the Comox Valley Hospice Society office.
- The Comox Valley Hospice Society shall have the right at any time and for any reason to request that the Third Party organizer cease use of the Society name in connection with the event or promotion and the Third Party

organizer must comply immediately with such request.

- The Comox Valley Hospice Society will not assume any legal or financial liability at a Third Party event or in conjunction with a Third Party promotion.
- The Comox Valley Hospice Society is not responsible for any damage, accidents to person or property at a Third Party event.

Top 25 Fundraising Event Ideas*

If you are in need of some inspiration for your fundraising event, check out our Top 25 Fundraising Ideas:

1. 'A-thons' (e.g. dance-a-thon, walk-a-thon, swim-a-thon, etc.)
2. Auction
3. Bake sale
4. BBQ/cook-off
5. Birthday celebrations
6. Bowling night
7. Car wash
8. Carnival
9. Comedy night
10. Craft sale
11. Small informal simple mocktail at-home party
12. Dinner or gala
13. Fashion show
14. Fitness challenge
15. Game night/poker tournament
16. Garage/second hand sale
17. Gift wrapping
18. Golf tournament
19. Karaoke night
20. Movie night
21. Pancake breakfast
22. Quiz night
23. Seasonal event (e.g. Easter egg hunt, Christmas decorating contest, etc.)
24. Sporting event
25. Wedding

PLEASE NOTE: It is very important that you familiarize yourself with the policies and procedures as outlined in the **Third Party Waiver and Liability Release Agreement** (pages 6-8). Should your event be serving alcoholic beverages, ensure that safe drinking is practiced and that there is safe transportation home for anyone who is drinking.

* Because of the COVID-19 pandemic and the Provincial Orders all events must be virtual until further notice.

Remember to collect all pledge forms and donations and submit them to the Comox Valley Hospice Society

no later than 30 days after the event.

Tax Receipt Guidelines

- The Comox Valley Hospice Society is only permitted to issue tax receipts to individuals who make a donation without receiving a tangible item or benefit in return.
- The Comox Valley Hospice Society can only issue tax receipts for the amount of the actual donations received by the Society.
- 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 Society 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>

Sample Event Budget Sheet

You can use the following sample budget sheet to manage your event's income and expenses.

EVENT BUDGET SHEET			
INCOME			
<i>Item (e.g. donations, ticket sales, etc.)</i>	<i>Estimated Quantity</i>	<i>Estimated Income</i>	<i>Actual Income</i>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
TOTAL INCOME:			
EXPENSES			
<i>Item (e.g. venue rental, food, fees, etc.)</i>	<i>Estimated Quantity</i>	<i>Estimated Expenses</i>	<i>Actual Expenses</i>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
TOTAL EXPENSES:			

Sample Letter of Support

The following is an example of a letter of support that the Comox Valley Hospice Society could write for you to use to validate that you have the Society's support for your event.

RE: [NAME OF THE EVENT]

To Whom It May Concern,

This letter is to inform you that [THIRD PARTY ORGANIZER] will be holding a fundraising event, [NAME OF THE EVENT], on [EVENT DATE] at [EVENT LOCATION] to benefit the Comox Valley Hospice Society.

The fundraising event is being conducted with the approval of the Society. If you would like to support the event – whether through sponsorship, donating a gift in kind, etc. – that would be most kind.

It is our dream that no one will feel alone when facing end of life, caregiving or grief. Events such as these and contributions from people like you go a long way to helping us realize that dream.

If you have any questions or concerns, please do not hesitate to contact me at 250-339-5533 or ed@comoxhospiced.com.

Thank you for supporting this endeavor.

Sincerely,



Jane Sterk

Executive Director

Comox Valley Hospice Society

Event Planning Checklist

Event Planning Checklist: Before the Event

- Choose an event to host.
- Select a date for your event as well as a location that is appropriate for your estimated scale and venue requirements.
- Set your fundraising goal and determine a budget for your event (**Sample Budget Sheet** on page 22).
- Complete and submit the **Third Party Waiver and Liability Release Agreement** (pages 8-9).
- Complete and submit the **Application Form** (pages 11-15).
- Recruit volunteers if needed.
- Find sponsors for your event to offset some of the costs you will incur. Begin your search with people you know such as friends and family. If there is a shop you often visit, ask them to support your event. See if an employer will match the donations made by employees to your event.
- Create a timeline/work back schedule to keep your event organized and on track.
- Advertise your event! Spread the word through social media, newspapers and media stations to increase attendance and support of your event. Ensure that, prior to advertising, your materials and messages are consistent with and approved for distribution by the Comox Valley Hospice Society.
- Organize for the day of the event. Make sure you have all the necessary materials ready **at least one week in advance** of the event day.

Event Planning Checklist: During the Event

- Ensure that your volunteers have been instructed and trained on their roles at the event.
- Assign someone to handle donations and to ensure donation pledge forms (page 21) are completed correctly.
- Display and distribute the Comox Valley Hospice Society brochures from those attending the event (specify type and quantity needed in the **Application Form** on pages 11-15).
- Have FUN!

Event Planning Checklist: After the Event

- Thank everyone who was involved in the event's planning and execution (participants, volunteers, sponsors and donors).
- Collect all raised funds and pledge forms, and complete the **Financial Summary Form** (page 16). Submit to the Comox Valley Hospice Society *no later than 30 days after your event*.
- Consider hosting the event annually. The first year is always the hardest but you can use what you learned to improve and grow!

Sponsor's Name (please print)	Address	City	Postal Code	Email	Telephone	Receipt?	Amount
<i>Sam Sampleton</i>	<i>123 Sample Ave.</i>	<i>Sampleville</i>	<i>A1B 2C3</i>	<i>s.sampleton@email.com</i>	<i>555-555-5555</i>	<i>Y</i>	<i>\$20</i>
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							
<i>Thank you for your generous support!</i>							



Comox Valley Hospice Society

102, 1509 Cliffe Avenue

Courtenay, BC V9N 2K6

250-339-5533

Charitable #: 119280691RR0001