



Third-Party Events

Hosting a third-party event is a wonderful way to show your support for Carpenter Hospice in our community. Third-party events refer to events that are created, managed, and run by businesses, individuals, groups, and service clubs that provide funds raised to Carpenter Hospice. Different events may provide a different proportion of funds to support our hospice; we consider an event an official third-party event if **at least 20% of the net profit** is raised for the hospice. While events and funds raised may be donated from other events, service clubs, etc., for the purpose of linking our mission, brand and logo (the assets discussed as part of this binding agreement) we do not consider those “third party events” and are alternatively considered corporate or organizational donations. Third-party events have a direct impact by supporting us to raise the over \$2M needed each year we need to sustain our programs and services, which we offer at no cost to our community.

Things to Think About when Planning a Third-Party Event

- **What do you hope to accomplish with this event?**
For example, do you want to raise money, increase awareness of Carpenter Hospice, or boost employee morale?
- **How much time will you need to organize this event?**
Consider the time commitment your event will consume. If it will take a month to plan, organize and execute, you cannot expect to hold the event in one week. Carpenter Hospice requires prior notice in order to help you have a great event!
- **What are your resources?**
Before committing to an event, you need to think about the resources you have available. Is there someone on your committee/group that has helped organize this type of event before? Does a committee member know a local business owner that might donate prizes?
- **What is your budget?**
Plan a budget and stick to it. Depending on the type of special event you are running, there may be costs involved and staying on budget will help ensure your group donates as much as the proceeds as possible to your community.
- **Do you have a back-up plan?**
Depending on type of event you may want to have a contingency plan in case of weather or other factors outside of your control.

The most important way to ensure that your event is successful is to plan carefully. Start with brainstorming event ideas, develop a work plan and set deadlines for tasks to be accomplished. Also ensure that your budget is realistic and keep detailed records of your expenses. Make sure everyone knows what they are responsible and accountable for.



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Thank You!

Dedicated groups and individuals like you are crucial in ensuring that Burlington residents have access to exceptional palliative and hospice care, free of charge.

Event Guidelines

Below is an outline of how we can support you in having a successful event. Please review information and forms and contact Carpenter Hospice if you have any questions:

Bharti Sharma – Fund Development Specialist

bsharma@thecarpenterhospice.com or 905-631-9994 x 134

A third-party event is defined as one where:

- The event is initiated by an outside party.
- All or >20% of net proceeds from the event are designated to Carpenter Hospice.
- Carpenter Hospice's name is used in any promotion of the event that states Carpenter Hospice as the/one of the charities of choice for event proceeds.

Please fill out the attached “Third-Party Agreement Form”; a form signed by both Carpenter Hospice and the third-party event planner, stating liability and the percentage of net proceeds to be donated to Carpenter Hospice.



Policies for Third-Party Events

Third-Party Event Form

The organizing party is asked to complete an “Event Details Form” which will state the necessary event details, such as the nature of the event, time, place and contact information, as well as provide Carpenter Hospice with your expectations on materials and services required from us (e.g. Promotional Materials, Hospice Representative, etc.).

The resources to be provided by Carpenter Hospice will be discussed between the parties prior to the event. Carpenter Hospice can provide resources to assist with the event such as logos, promotional materials, and ideas. However, the responsibility remains with the event organizers for selling tickets, volunteer recruitment, advertising, etc.

Tax Receipts

Carpenter Hospice can only generate official tax receipts according to the Tax Receipting Procedures in compliance with the Canada Revenue Agency (CRA) Guidelines. Carpenter Hospice does not issue tax receipts for proceeds received from Third-Party Events.

Due to the complexity of the documentation required by CRA, receipts at a third-party event will only be issued for donations made directly to Carpenter Hospice, where there was no benefit to the individual from the event.

Example 1: You host a golf tournament charging \$350/person. You calculate the advantage received (i.e. participation in tournament, dinner, any additional gifts or value delivered.) at \$200. If documented correctly tax receipts *may* be eligible for the remaining \$150.

Example 2: You host a community BBQ. You charge a fee for hamburgers and hot dogs at the event (these are proceeds and not eligible for a tax receipt), but you also provide an opportunity for direct donations (i.e. a donation box where individuals can make an additional donation without receiving any advantage/goods) – this may be eligible for a tax receipt if it is a minimum of \$20.00 and documented correctly.

Net funds raised from the third-party event should be submitted no later than 30 days after the event. At this time, donor information for those eligible for tax receipts must be submitted.

Tax Receipts **cannot** be generated for:

- **Event Proceeds**
- Purchase of Goods (admission tickets, green fees, auction items and other goods that provide a benefit or value)
- Gifts of Services (donated time, labour).
- Event Sponsors



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Event Expenses

Carpenter Hospice cannot fund or reimburse any expenses incurred throughout the planning and execution of the event.

Financial Statements

Carpenter Hospice reserves the right to require representation from the auditor/public accountant of the company/organization stating that the revenues and expenses are accurate as presented.

Branding

Carpenter Hospice's name/logo should be on all appropriate promotional materials. However, use of our name/logo requires approval before it becomes public-facing and should state organization as beneficiary of event. (In support of Carpenter Hospice, etc.) Proper logos will be provided for print/digital usage. If you require any assistance with the creation of posters and materials, our team can assist.

Social Media

By tagging the Carpenter Hospice social media accounts on Facebook and Instagram, we will be able to share your event to assist with outreach and engagement. If properly sized graphics are created, we can also share them directly from our social media accounts. If you require assistance with creating social media graphics, our team can support you.

Event Proceeds

By publicly naming Carpenter Hospice as the beneficiary of your event, you are required to donate the full amount agreed upon, of the net proceeds, to Carpenter Hospice within 30 days of the event. The third-party individual or organization agrees to handle all monetary transactions for the fundraising event.

Door-to-Door Solicitation

Carpenter Hospice does not participate in any door-to-door fundraising initiatives or support organizations which do so on its behalf.

Letter of Support

Upon request, Carpenter Hospice can provide a letter of support to be used to validate the authenticity of the event and its organizers.

Donor Privacy

Carpenter Hospice will not share/rent/trade lists of donors, clients, or families as in accordance with our privacy policy.

Hospice Representation

We will do our best to have representatives from the organization at the event; this may be a trained volunteer or staff. However, if you require someone to speak on behalf of the organization, please indicate this request, specifically, in advance.



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Insurance

Most venues require the third-party event to provide evidence that it carries a minimum of \$2.0 million in public liability insurance and must indemnify Carpenter Hospice for all damages, costs, claims and/or expenses arising from the event.

For any further inquiries or questions, please contact:

Bharti Sharma, Fund Development Specialist

Phone: 905.631.9994 ext. 134

Email: bsharma@thecarpenterhospice.com



THIRD-PARTY EVENT DETAILS FORM

Contact Name/Organization		
Contact Number/Fax		
Contact Address		
Contact Email		
General Event Information		
Event Name		
Event Type (Golf Tournament, etc.)		
Date & Time of Event		
Venue Name		
Venue Address		
Additional Information		
Event Dress Code (Casual, formal, business attire, etc.)		
How many attendees do you expect?		
Are you holding this event in honour/memory of a person?	YES NO	
	For Whom?	
Will this be an annual event?		
How much money would you <i>estimate</i> you will raise at this event?		
What percentage of the monies raised will be donated to Carpenter Hospice?		
Are you donating funds from this event to other organizations? If Yes, who?		
How many volunteers will be participating?		
Will the event be open to the public?	YES	NO
Will you require individual charitable tax receipts?	YES	NO
If yes: Please discuss with Carpenter Hospice about CRA regulations.		
Will you require a Hospice representative to assist or speak at your event?	YES	NO
Do you require a ticket to be purchased to attend the event to fulfill the request?	YES	NO
Would you like to do a post event cheque presentation?	YES	NO
Would you like to receive materials for display at your event?		
If yes, what types of materials?		



BUDGET

All costs are to come out of the event proceeds or should be paid directly by the event organizer.

Please list expected revenues and estimated expenses (even if you anticipate having them donated or sponsored).

Estimated proceeds from the event/fundraising activity: \$ _____

Estimated amount of donation (\$) to Carpenter Hospice: \$ _____

REVENUE		EXPENSES	
Sponsorships	\$	Venue	\$
Donations	\$	Food/Beverage	\$
Ticket Sales	\$	Printing (posters, tickets, etc.)	\$
Product Sales	\$	Prizes	\$
Silent Auction	\$	Advertising	\$
Raffle*	\$	License Fees	\$
50/50*	\$	Postage	\$
Other	\$	Security	\$
*denotes activities that require a gaming license		Liability Insurance (if required)	\$
Total Revenue	\$	Total Expenses	\$
NET PROFIT (Total Revenue - Total Expenses)		\$	



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THIRD-PARTY EVENT AGREEMENT FORM

I/We, _____, will organize and conduct an event to be called

(Name of individual or organization)

_____ in the Burlington area, on _____.

(Name of event)

(Date of event)

I/We agree to donate a portion of the net proceeds to Carpenter Hospice and to submit a financial report of the event detailing all revenue and receipts, all expenditures and net profit, if requested.

I/We hold harmless Carpenter Hospice for any and all liabilities associated with this event, unless prior written consent to cover expenditures is received from Carpenter Hospice’s Treasurer or Executive Director.

Any other signage utilizing Carpenter Hospice’s logo or public-facing material must be authorized in writing by Carpenter Hospice.

I/We understand and acknowledge that Carpenter Hospice does not issue tax receipts for third party events unless it is an outright donation made out directly to Carpenter Hospice.

Third-Party Organizer

Proposed by:

Signature

Name and Title (print)

Date: _____ (MM) _____ (DD) _____ (YYYY)

Carpenter Hospice

Reviewed by:

Signature

Name and Title (print)

Date: _____ (MM) _____ (DD) _____ (YYYY)



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10 TIPS FOR A SUCCESSFUL EVENT

1. Approval

After conceptualizing your event, it is important to fill out a proposal form and submit the completed and signed copy to Carpenter Hospice. Permission is required in order to execute your special event using Carpenter Hospice name or logo.

2. Form a Group

The success of a special event is directly related to the enthusiasm of those organizing it! Create a group that is composed of enthusiastic, skilled, and motivated people. Depending on your location, we may be able to offer you some support for your event.

3. Set Goals

Be realistic when setting a financial goal. The budget section of the event proposal form will help you gauge the scale of your event.

4. Brainstorm

Use your imagination to create fun and successful fundraisers!

5. Schedule the Event

Be mindful of any other fundraising events going on that may be competition for your event. Also, make sure your event is held at a time when attendance will be high, such as on the weekend or outside of the usual 9-5 work week hours, unless your event is based around the office workday.

6. Budget

Keeping costs down will generate a bigger profit for your event. Be sure to account for costs such as venue, food, postage, permits etc. Try and get things donated where possible! As much as possible Carpenter Hospice will try and lend resources such as posters and literature.

7. Promotion and Publicity

Be sure to communicate to Carpenter Hospice your plans for using our logo. It is symbolic and is meant for specific use. Its use must be approved. Promote your event; just be sure your materials have been approved by Carpenter Hospice before doing so.

8. Collect the Funds

Be sure to be very clear about how funds will be generated for Carpenter Hospice and in what percentages. For example, if you are selling tickets to an event, be sure to display what percentage of the price of the ticket will be donated to Carpenter Hospice. Please have your funds in to Carpenter Hospice within 30 days of your event.

9. Thank you

Please be sure to thank the people who have helped with your event. They would also be proud to hear how much money was raised in support of Carpenter Hospice.

10. Have Fun!