



Third Party Event Fundraising Package

Thank you for choosing to support Wellspring Alberta (registered CRA Charity #80901 3675 RR0001) through your event! When you fundraise for Wellspring, your efforts ensure our members do not have to face cancer alone. Wellspring Alberta does not receive any core government funding, relying on the generosity of the community and people like you to support our work. You make what we do possible, and ensure our programs are available free of charge to those living with cancer across southern Alberta.

Included in this package:

1. Wellspring Alberta Third Party Fundraising Event Guidelines & Policies
2. Wellspring Alberta Third Party Event Fundraising Application
3. Third Party Fundraising Event Summary & Survey: This form should be completed and returned to Wellspring within 30 days following the published date of your event, along with any remaining cash and cheques collected. Please take a few minutes to fill out this survey and send it back to us. Feedback on how we can improve is always welcome.

What is a Third Party Fundraising Activity or Event?

Third party activities and events are fundraisers that in whole or in part benefit Wellspring Alberta, its mission and its goals, and are organized and executed by an individual or organization external to the charity and little or no support is required from Wellspring Alberta.

Guidelines & Policies

We want you to have a successful event. Please read the guidelines below carefully prior to submitting your **Third Party Fundraising Event Application**. Should you have questions about holding an event, please contact us at events@wellspringalberta.ca or by phone at **587.747.0260 ext 1234**.

Please note – *Wellspring Alberta's Third Party Event Application must be completed and all fundraising event activities must be endorsed by Wellspring prior to organizing or hosting your event.*

What You Need to Do Yourself:

- Manage your event logistics (e.g. choosing a venue, theme, ticket sales, invitations, promotion, collecting donations securely, protecting donor information, etc.)
- Acquire any licenses, permits, and/or liability insurance required for your event and/or location
- Request advance permission to use Wellspring Alberta's name and/or logo for anything to do with your event
- If you're going to publish pictures/videos online (Facebook, Twitter, Instagram), make sure you get advance permission from attendees beforehand (can be as simple as a sign at your event that you will be publishing photos)
- Download, complete and submit our **Cash and Cheque form** to collect donations from event participants. This form must be submitted to Wellspring with cash and cheques collected through your event for event donors to receive charitable tax receipts. *Please ensure you read the section in this document titled "So You Want a Charitable Tax Receipt" before submitting this form as not all gifts may qualify for a tax receipt.*

What Wellspring Can Do for You:

- Issue charitable tax receipts in accordance with [Canada Revenue Agency](#)
- Provide information about Wellspring (e.g. brochures, pop-up banners) based on availability
- Provide you with a Letter of Support for your event
- Promote your event through Wellspring Alberta social media (based on availability and appropriateness)

Application Process

- Organizers must complete and submit the Third Party Fundraising Application to Wellspring Alberta, preferably no less than four weeks prior to the date of the proposed fundraising activity. The application must be received before advertising is permitted.
- If you want to collect credit card donations through your event, after the Third Party Fundraising Application is received and endorsed by Wellspring, a link will be provided to you, with support from Wellspring Alberta.
- Applications are valid for one event only. Annual event and activity organizers are required to submit a new application each year (per event).
- Wellspring Alberta must be notified in advance if you plan to share proceeds with another charity or person.
- Wellspring must be notified in advance of any activity/event sponsors you have secured or will be approaching.
- Wellspring Alberta reserves the right to refuse funds raised from a fundraising activity that is not in accordance with Wellspring's mission, goals, or which is contrary to the image and/or brand of Wellspring Alberta.

Event Promotion and Use of the Wellspring Alberta's Name and Logo

- Please request advance permission from Wellspring Alberta prior to using our name and/or logo in conjunction with your event. Wellspring requests that all promotional materials are submitted to communications@wellspringalberta.ca for approval prior to distribution. High resolution files of the Wellspring logo will be provided upon request. Please allow five business days for prior approval of all promotional materials.
- Please note: The Wellspring Alberta logo cannot be used for purposes other than those described in the Third Party Fundraising Event Application.
- All promotional materials should clearly state that the activity or event is "In Support of" or "Proceeds to" followed by the Wellspring logo. Materials must NOT state that Wellspring Alberta is a sponsor or co-sponsor of an activity or event unless otherwise approved by Wellspring in writing.

Liability & Licenses

- Raffles, lottery sales or any other type of sales (gaming) requires a special license or permit. Please make sure you take the necessary steps to obtain these. Wellspring Alberta will not provide licenses or permits for third party activities or events and will not be held liable should your event or activity be found in violation of these rules and guidelines.
- Wellspring Alberta does not provide insurance coverage for third party events or activities. Event organizers must take the necessary steps to obtain proper insurance if/as required by the venue.
- The event organizer and other related parties (including donors and sponsors) agree to indemnify and hold harmless Wellspring Alberta and its directors, employees, and volunteers from any and all claims and liabilities in any way related to the event.

So you want a charitable tax receipt?

Wellspring Alberta is delighted to accept qualifying donations of all amounts in support of our mission to serve people living with cancer and our vision that no one has to face cancer alone.

According to **Canada Revenue Agency (CRA)**, any gift can be charitably receipted for tax purposes if it is given without an expectation of anything in return. **Please note:** Receipts are issued to the person who gives the money. **If you want a receipt in someone else's name, contact our office.**

When you WILL receive a tax receipt:

- Your qualifying donation is \$20 or more (*or you specifically request a receipt for a lesser amount*).
- You don't want any public recognition for your gift (*naming, logo placement*).
- You've purchased something that Wellspring Alberta wants or has asked for, and you've given Wellspring Alberta the item and the purchase receipt for it (*Check with our office before you make a purchase!*).
- You've provided us with your (the donor's) full personal mailing address.

How and when you will receive a receipt:

- Online donations (via credit card): your tax receipt will be immediately delivered in pdf format to the email address you provide when you make your gift.
- Cheques and cash: your tax receipt will be mailed to you (Canada Post) within 3 weeks of the date Wellspring Alberta has received it.

When you will NOT receive a tax receipt:

- Purchasing a silent auction item at an event (*unless your auction purchase is more than the fairmarket value of the item*).
- Time or labour costs.
- Purchasing a raffle ticket, or anywhere you might win a prize (draw, 50/50, etc). (*You are getting something in return for your 'purchase' so it's not a donation.*).
- A fee or ticket for entry or participating in an event (*unless the fee is identified as qualifying for a tax receipt*).
- You (your company) receives recognition, advertising or logo placement in return for your investment (*e.g. sponsorship*).
- GST is not receiptable.

THIRD PARTY FUNDRAISING EVENT APPLICATION (PLEASE PRINT)

While you may already have an event or initiative planned, here are some other ideas you might consider: a bake sale, barbecue, bowling night, can/bottle drive, picnic, dress down day, employer matched donations, theme party, hot dog sale or head shave.

I. Your Contact Information (Event Organizer/Host)

First Name		Last Name	
Daytime Phone		Email	
Mailing Address			
City, Province		Postal Code	

II. Company Information (If Applicable)

Company Name			
Mailing Address			
City, Province		Postal Code	
Daytime Phone		Email	
Website			

III. Tell Us About Your Event:

Event Name			
What kind of event is this? <i>(e.g. head shave, birthday, dance, golf)</i>			
Event Description/Summary <i>(tell us about your event, why you are holding it)</i>			
Event Date		Event Start Time	
Location/Address			
Expected # of Attendees		Fundraising Goal	
How will you promote your event?			

IV. Financial Information

How will funds be raised? *(Check all that apply)*

- Donations
- Ticket sales
- Auction
- Gaming
- Sales (liquor, merchandise, etc.)
- Other (please explain below):

Are you approaching sponsors?

Yes No

If YES, please list the organizations being approached below (to avoid potential conflicts with current or potential Wellspring Alberta sponsors):

Will the proceeds of your event/activity be donated only to Wellspring?

Yes No

If NO, who else will benefit from your event? (list all):

What percentage of proceeds will Wellspring receive? _____

V. Event Social Media Accounts (if applicable):

Facebook: _____

Twitter: _____

Instagram: _____

Other: _____

Event hashtag: _____

VI. Wellspring Alberta Involvement

Please note: We will do our best to support your event, but we may not be able to meet requests for speakers, representatives, and/or volunteers.

Will you require the Wellspring name and logo for promotional use? Yes No

If YES, please indicate what type of materials you will be producing (eg posters, tickets, webpage):

If you would like promotional materials from Wellspring Alberta, please indicate quantities required:

Brochures: _____ Banners: _____ Annual Report: _____ Program Schedule: _____

VII. Other Information

Is there any other important information Wellspring should know regarding your event?

THIRD PARTY FUNDRAISING EVENT AGREEMENT

*Please review and sign this form, and return it with the Third Party Fundraising Application. This form is due **four weeks prior to the proposed event**. Completion of this form does not guarantee endorsement. Upon endorsement, you will receive an approved signed copy of the application for your records.*

By signing this document, I/we acknowledge receipt of Wellspring Alberta's Guidelines and Policies for Third Party Fundraisers and agree to comply with all provisions in organizing and holding our fundraising event.

I/we also agree with the collection of any and all information Wellspring deems necessary to evaluate the event. I/we further attest that all information provided on this form is correct and accurately describes the proposed event.

I/we agree to indemnify and hold harmless Wellspring Alberta for any expenses, losses, claims or damages resulting from the fundraising event or the noncompliance with any terms or provisions of Wellspring Alberta's Policies and Procedures for Third Party Fundraisers, and/or Canada Revenue Agency, and/or Alberta's Charitable Fundraising Act.

The event organizer and other related parties (including donors and sponsors) agree to indemnify and hold harmless Wellspring Alberta and its directors, employees, and volunteers from any and all claims and liabilities in any way related to the event.

Agreed:

Signature _____

PRINT NAME _____

Date Signed _____

Please return this signed Agreement and Application to Wellspring Alberta's event manager at events@wellspringalberta.ca

THIRD PARTY FUNDRAISING EVENT SUMMARY AND SURVEY

1. Please provide us with a brief financial summary of your event:

Total amount raised from the event: \$ _____

Total expenses: \$ _____

Total donation to Wellspring Alberta: \$ _____

2. How successful did you feel your event was? *(please circle one)*

(lowest) 1 2 3 4 5 (highest)

3. Did you meet your financial goals? Yes _____ No _____

4. Are you planning on hosting this event again? Yes _____ No _____

5. If so, how often? One-time _____ Annually _____ To be determined _____

6. How satisfied were you with the amount of support you received from Wellspring Alberta for your event? *(please circle one)*

(lowest) 1 2 3 4 5 (highest)

7. Do you have any suggestions to help Wellspring Alberta make the process of hosting an officially endorsed event better?

Please return this Third Party Fundraising Event Summary and Survey to Wellspring Alberta at events@wellspringalberta.ca