



## Third-Party Events

Carpenter Hospice encourages Third-Party Events that will promote the work of Carpenter Hospice and increases our awareness in the community.

Third-Party Events are those created, managed and run by various businesses, individuals, groups and service clubs for the benefit of Carpenter Hospice. Hosting a third-party event is a wonderful way to show your support for compassionate hospice care in our community.

### *Things to Think About Before Making an Application*

- **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?
- **Has a similar event been held at your organization before?**  
If so, you should determine how successful it was as a fundraiser, awareness builder, and morale booster. If it wasn't successful, was it due to poor planning or a general lack of interest? You can learn from past experience.
- **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 eight weeks notice if no license is required and twelve weeks notice if one is.
- **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 that has helped organize this type of event before? Does a committee member know a local business owner that might donate prizes? Consider the tangible and intangible assets available.
- **What is your budget?**  
Plan a budget and stick to it. Depending on the type of special event you are running, there may be significant costs involved.
- **Do you have a back-up plan?**  
It's always a good idea to come up with some alternative ideas in case an event proves impossible. You may also need to contingency plan if your event is held outdoors and it rains or snows.



The most important way to ensure that your event is successful is to plan carefully. Start with brainstorming event ideas, then 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.

### **The Need**

We are dependent on the generosity of the community and fundraising for the majority of our operation revenue. Carpenter Hospice needs to raise over \$1.4 million each year, which provides us with the capacity to offer all of our services and programs at no cost to the end users.

Every dollar makes a difference in allowing Carpenter Hospice to provide the highest quality of care for our residents and program participants.

Carpenter Hospice is a home in the heart of Burlington that offers both residential-based care to people in the last stages of their lives, and community-based programs for people dealing with grief or a life-limiting illness. It lets residents spend their final days together with loved ones in an environment that is peaceful, comfortable and meaningful. It is staffed by a dedicated team of professionals and volunteers who provide compassionate, palliative care to meet residents' every need and ensure that each moment counts.

### **Event Guidelines**

We state this information in advance so that there are no misunderstandings with regards to our ability to participate and support your fundraising event.

To hold a third-party fundraising event, approval must be granted by Carpenter Hospice. The initial step to gain approval is to 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.

A third-party event is defined as one where:

- The event is initiated by an outside party;
- A portion of the funds are designated to Carpenter Hospice;
- Carpenter Hospice's name is used in advertising to state Carpenter Hospice as the designated recipient of the event proceeds;
- Hospice staff involvement is minimal

Please note: Carpenter Hospice does not issue tax receipts for 3<sup>rd</sup> party event proceeds.



## 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 Speaker, 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 from promotional material to ideas. However, the responsibility remains with the promoters for selling tickets and volunteer recruitment.

### 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.

If donations are being collected at your event, please contact Angela Marlatt for details on how to track information in order for donors to receive tax receipts. We can provide you with donation forms and/or a tracking sheet.

Net funds raised from the third party event must be submitted to Carpenter Hospice 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



### **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 should be on all appropriate promotional materials. However, use of our name requires express approval before usage. Carpenter Hospice's name is only used to announce that we are the recipients of the proceeds from the event.

### **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 social gaming events, 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 cannot share mailing lists of donors, clients or families in accordance to its privacy policy.

### **Hospice Representation**

Carpenter Hospice cannot guarantee staff or volunteer attendance at your event.

### **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.



Carpenter Hospice policy is to acknowledge and recognize the contribution and effort made to Carpenter Hospice. A Donor Recognition Program has been established separate and apart from any recognition that may be received from a third-party event. Feel free to discuss with Carpenter Hospice representative how your event may be recognized.

For any further inquiries or questions, please contact:

**Dana Rushak, Development Assistant**

Phone: 905.631.9994 ext. 114

Email: [donations@thecarpenterhospice.com](mailto:donations@thecarpenterhospice.com)

Carpenter Hospice  
2250 Parkway Drive  
Burlington, ON L7P 1T1



## THIRD-PARTY EVENT FORM

Contact Name/Organization	
Contact Number/Fax	
Contact Address	
Contact Email	
<b>General Event Information</b>	
Event Name	
Event Type (Golf Tournament, Dance Etc.)	
Date & Time of Event	
Venue Name	
Venue Address	
<b>Additional Information</b>	
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?	
How many volunteers will be participating?	
Will the event be open to the public?	
Will you require tax receipts? (circle one) YES   NO                      If yes: Please discuss with Carpenter Hospice to determine if issuing tax receipts is possible under CRA regulations.	
Will you require a Hospice representative to assist or speak at your event?	
Do you require a ticket to be purchased to attend the event to fulfill the request?	
Will there be a post event cheque presentation?	
<b>Would you like to receive materials for display at your event?</b>	
If yes, what 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
Sponsorship	Venue
Donations	Food/Beverage
Ticket Sales	Printing (posters, tickets, etc.)
Product Sales	Prizes
Silent Auction*	Advertising
Raffle*	License Fees
Other	Postage
	Security
*these events require a gaming license	Liability Insurance if applicable
Total Revenue      \$	Total Expenses      \$
NET PROFIT (Total Revenue minus Total Expenses) \$	



## THIRD-PARTY EVENT AGREEMENT FORM

I/We, \_\_\_\_\_, propose to offer Carpenter Hospice to  
(Name of individual or organization)

organize and conduct an event to be called \_\_\_\_\_ in the  
(Name of event)

\_\_\_\_\_ area, on \_\_\_\_\_.  
(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.

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 relations 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.

Proposed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Date

Accepted by: Carpenter Hospice

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Date





## 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. Make Sure You Have the Right Event

Utilize the skills and assets of your group members. For example, if your group is composed of artists and photographers, maybe a bake sale isn't the best fundraiser for you! Try having a silent auction where your members' work can be auctioned off for a profit.

### 6. 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 work day.

### 7. 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.

### 8. 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.

### 9. 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.

### 10. 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.