



Third Party Fundraising Guidelines

Introduction

The Central Alberta Women's Emergency Shelter (C.A.W.E.S.) relies on the willingness of many individuals and organizations that generously initiate fundraising events and activities to raise money in support of our shelter programs and services.

We deeply appreciate the commitment and investment of time and financial resources required in the successful execution of such initiatives. In order that both C.A.W.E.S. and the Third Party have a clear understanding of expectations in the execution of such endeavors, and so C.A.W.E.S. can assess whether we are able to participate in the particular initiative Third Party Fundraising Guidelines and Application have been developed and are attached.

Third Party organizations interested in donating proceeds from their events must read the Third Party Fundraising Agreement, initial where indicated and sign as having accepted them. If initials are not provided at any point where indicated, C.A.W.E.S. staff will contact the Third Party in order to be certain that they have read and understood the issue. Also, the Third Party must complete the short Application provided.

What is Third Party Activity?

A Third Party activity can be defined as any fundraising initiative brought forward by an individual(s), community groups, service club, or business external to C.A.W.E.S. who wish to raise money through a planned activity that is designed, managed and financially resourced by the external participants.

Third Party Level One Activity: Straight Donations

Level One Activities are essentially independent from C.A.W.E.S., however all net proceeds or some portion of the activities funds are donated to C.A.W.E.S. We welcome such donations. Should it be requested, C.A.W.E.S. is willing to provide the following support:

- ✓ Appropriate C.A.W.E.S. signage
- ✓ A C.A.W.E.S. staff member or volunteer to attend the event or cheque presentation
- ✓ Tax receipting according to Revenue Canada Guidelines

Third Party Level Two Activity: Indirect Participation

Level Two Activities are larger in scope requiring that the third party, in order for the initiative to be a success, use significant resources. This usually requires that the third party to undertake public promotional activities like putting up posters and sending letters to sell tickets. In these cases, the organizers must meet the C.A.W.E.S. evaluation criteria. Approval is also required from the Fundraising Coordinator prior to implementation of such initiatives.

Third Party Level Three Activity: Partnership

Level Three initiatives require active involvement of C.A.W.E.S. staff and volunteers in the planning and execution of the event. In the case of such initiatives, the third party must complete a written, application (attached) for consideration. When applications have been approved, a formal agreement must be entered into so that the obligations and responsibilities of each party are clearly understood.

Third Party Activity Guidelines

- ✓ All three levels of activity require that Third Party activities be submitted through a written application to C.A.W.E.S. You may use your own format, being sure to cover off all the areas listed in the application.
- ✓ The Third Party must comply with the guidelines and agreement attached, as well as completing all requirements in the application.



Third Party Fundraising Agreement

If you wish to help C.A.W.E.S. by holding a fundraiser with net proceeds or a portion thereof being donated to C.A.W.E.S., we ask you to follow these guidelines. Please read the information and place your initials where indicated. We want to know about your event and assist where we can, so please keep us posted.

- ✓ C.A.W.E.S. encourages fundraising events that are consistent with our good image and core values. _____ Initials
- ✓ To conduct an event, you are required to complete an application. You may use this format or your own, but please cover all the areas in the application. Once you submit your application, we will review it and respond within one week. If the application is approved, we will provide you with a Letter of Agreement. This may be shown to potential donors, sponsors, and volunteers. _____ Initials
- ✓ Any organization/group that is donating A PORTION of their net proceeds rather than the full amount, must state exactly how much, either in a percentage or a specific dollar amount on the application form. _____ Initials
- ✓ Any organization/group wishing to use the C.A.W.E.S. name or logo on any materials, including advertising, must receive C.A.W.E.S. approval prior to production.
_____ Initials
- ✓ C.A.W.E.S. must not be party to any liability coverage without prior knowledge and approval. Approval will generally only apply to Level Three Activities as discussed in the Introduction. _____ Initials
- ✓ The sponsoring organization/group agrees to underwrite all costs of the special event or promotion and to secure such underwriting. C.A.W.E.S. shall incur no costs unless otherwise agreed in writing prior to the special event or promotion. _____ Initials
- ✓ The organization/group is responsible for obtaining appropriate licenses (ie. Raffles, liquor permits etc) _____ Initials.
- ✓ C.A.W.E.S. agrees to provide the sponsoring organization/group with appropriate recognition commensurate with the size of their gift as per our Donor Recognition Policy.
_____ Initials
- ✓ The sponsoring organization/group agrees to handle all monetary transactions for the special event or promotion and to present the proceeds to C.A.W.E.S. within 30 days of the completion of the event or as agreed in writing to C.A.W.E.S. _____ Initials
- ✓ The sponsoring organization/group agrees to submit a one-page final report upon making the donation. _____ Initials
- ✓ The preferred method of payment is a cheque or money order payable to C.A.W.E.S. Tax receipts can be provided for any cash donation or in-kind donation of \$10.00 or more. We provide tax receipts in accordance with Revenue Canada Guidelines. Please direct any questions to C.A.W.E.S. Fundraising Coordinator. _____ Initials
- ✓ The sponsoring organization/group agrees to ensure that all materials borrowed are returned promptly and in the same condition they were received. The sponsoring organization/group agrees to accept responsibility for damage or loss of materials borrowed from C.A.W.E.S. _____ Initial.

Acceptance of the above Guidelines by the Organization/Group

Name: _____

Position: _____

Signature: _____ Date: _____



**Third Party Fundraising
Activity Application 2006-2007**

Date: _____

Name of Organization, Business or Individual:

Contact

Name: _____

Mailing Address:

Phone #: _____ Cell: _____

Fax: _____

E-Mail: _____

Why did you decide to support C.A.W.E.S.?

How did you hear about C.A.W.E.S.?

Type of activity/event do you want to do:

Date of activity:

Location:

Brief Description of Event:

Event Timeline:

Promotion / Advertising

Strategies:

Newspaper

Radio

Television

Magazines

Posters

Flyers

Free Standing Signs

Other:

Please describe how you will use these strategies to promote your event:

How and/ or where do you wish to have C.A.W.E.S. involvement?

What support do you expect from the C.A.W.E.S.? (ie. Volunteers, materials, staff, prizes, etc.)

If you are donating a portion of the net proceeds from your event, rather than the full amount, to C.A.W.E.S., please specify what percentage or dollar value you will be giving?

% of Proceeds: _____

or

\$ Value of Proceeds: _____

Acceptance of the above Guidelines by the Organization/Group

Name: _____

Position: _____

Signature: _____

Date: _____