



Event Proposal Application & Information Package

Any questions, contact:

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Third Party Events Toolkit

Thank you for your interest in supporting the Centre for Addiction and Mental Health (CAMH) Foundation by raising funds! Your donation to the CAMH Foundation helps create a better understanding of mental illness and addiction in our community leading to better care and real solutions for the 1 in 5 affected Canadians. We appreciate each and every gift we receive. Every gift represents a victory in our fight against the stigma of mental illness and addiction.

No idea is too big or too small!

Here are some events and fundraising ideas you can host in support of CAMH Foundation.

Host a golf tournament

Run pledge-driven challenges

Hold an auction or talent show

Hold a barbecue or soft ball tournament

Organize a dance or gala dinner

Organize a walk-a-thon, bake sale or party

Hold a theme breakfast, lunch, dinner or
craft show

Donate your dress down days

Check out our upcoming events for more ideas!

<http://www.supportcamh.ca/event>

10 Steps to Help Plan Your Event

1. **Create a plan.** Ask yourself, what will my event look like? How will I raise money? How can I spread the word about my event? Will the event be held at a venue? When will my event be? Do I need help organizing and promoting?
2. **Create a planning committee.** This will not only help to share the workload, but will also combine many different skills.
3. **Establish your goals.** Set realistic and measurable financial goals and identify all possible sources of both income and expenses. These goals will ensure that every penny raised is going to help the cause, not just pay for your event.
4. **Appeal to your audience.** Be sure that the event fits the size, interest, talents, goals and availability of your audience to ensure that people will attend.
5. Fill out an **Event Proposal Application** and submit it to us before proceeding.
6. **Stay organized.** Create a timeline to ensure your event is well organized. Set dates for sending out invitations, making follow up calls, booking suppliers etc.
7. **Promote your event with pride!** Please ensure that all of your promotional materials and publicity are reviewed and approved by CAMH Foundation.
8. **Be Prepared.** Give yourself enough time to make sure everything can be done.
9. **Say thank you!** Acknowledge everyone who participated in and supported your event. Let them know how much was raised for a great cause and how much you appreciate their support.
10. **Tax Receipting.** Please speak to us about tax receipting in relation to your event *before* discussing tax receipts with your supporters. Tax receipts will be issued in accordance with the rules and regulations of CRA and the policies and procedures of CAMH Foundation. All proceeds from the event must be forwarded to CAMH Foundation within 45 days of your fundraising event (note: official charitable receipts dated for the year of your event can only be issued if all money and information is received by December 31st of that year).



How can the CAMH Foundation help?

Depending on the scale of your event the CAMH Foundation can:

- Answer questions and provide advice on planning your event
- Provide resources to assist you with your planning and organization of the event including templates: event check list, thank you letter, pledge form, and budget form etc.
- Promote your event on our Upcoming Events calendar on the Foundation website
- Provide promotional material such as CAMH posters and CAMH informational materials
- Permit the use of the CAMH Foundation logo on marketing materials (all promotional materials must be approved by the Foundation)

Overview of Policy

CAMH Foundation welcomes special fundraising/promotional events (“Third Party Events”) organized by an outside individual/organization (the “Third Party”).

In order to maintain its status as a registered charity, CAMH Foundation follows the Canada Revenue Agency’s (CRA) administrative guidelines on fundraising. These policies place a high burden on charities to monitor Third Party Events. The CAMH Foundation does not have the administrative resources to assist and oversee third party events. Therefore, this Third Party Special Event Policy has been created to simplify compliance with CRA guidelines.

All Third Party Events shall be the sole responsibility of the Third Party. All revenue and expenses from the Third Party Events shall be those of the Third Party. If no Third Party Event-related expenses are anticipated, participants will be encouraged to make their donations directly to CAMH Foundation.

In order for the Third Party Event to associate itself with the CAMH Foundation, the Third Party must comply with the following policy.

Policy

Third Party Events are required to:

1. Be consistent with the mission and values of CAMH and CAMH Foundation.
2. Present a positive image and improve public awareness about CAMH.
3. Have financial benefits to the CAMH Foundation.

CAMH Foundation reserves the right to:

1. Refuse involvement, and the use of its name and logo, in circumstances where the Third Party Event does not meet with its approval.
2. Refuse approval of sponsors as per the policies and procedures of CAMH Foundation
3. Relinquish support of any Third Party Event that does not abide by the policies, criteria, and guidelines outlined in the Third Party Special Event Agreement.

Criteria

The following criteria will apply to all Third Party Events conducted on behalf of CAMH Foundation.

1. Submission by the Third Party of a written proposal to include (but not limited to):
 - The concept and details of the Third Party Event.
 - Names of sponsors, if any.
 - A list of the Third Party's expectations of the CAMH Foundation (for volunteers, promotion, etc).
2. Consistency of the Third Party Event with CAMH Foundation's mission and values.
3. Positive marketing/public relations exposure for CAMH Foundation.
4. A budget of the Third Party Event (profits from the sale of alcohol, tobacco or gambling are strictly prohibited by CAMH Foundation. Any events including a raffle will be discussed on a case-by-case basis).
5. Meeting staff and volunteer resource requirements.
6. Lack of conflict with CAMH Foundation existing events and promotions.

Guidelines for Approved Third Party Events

Third Party Events approved by CAMH Foundation are required to adhere to the following guidelines

Accountability

- The Third Party will provide periodic status reports to CAMH Foundation on an agreed-upon basis.
- CAMH Foundation will not be responsible for any expenses related to the Third Party Event, including any financial losses or unsettled accounts.
- In the event of cancellation, the Third Party will inform CAMH Foundation, where possible, a minimum of 72 hours prior to the original date of the Third Party Event.
- CAMH Foundation will not be named in, or sign, contracts on behalf of the Third Party. Neither should any contracts be signed nor any obligations made on behalf of CAMH Foundation.
- In addition to CAMH policies, Third Party Events will comply with all applicable municipal, provincial, and federal laws and regulations and the Association of Fundraising Professionals Guidelines.

Sponsorship

- CAMH Foundation will not solicit sponsors on behalf of The Third Party or provide contacts for sponsorship.
- CAMH Foundation must approve potential sponsors for the Third Party Event in advance. The Third Party shall disclose to the sponsor that CAMH Foundation is not the host or owner of the event, but that participants at the Third Party Event will be encouraged to make donations to CAMH Foundation.

Financing

- CAMH Foundation will not supply any funding to finance a Third Party Event and will not be responsible for any debts incurred.
- All revenue from the Third Party Event shall be the property of the Third Party.
- All expenses from the Third Party Event shall be the sole responsibility of the Third Party.
- The Third Party shall not open any bank accounts in the name of CAMH Foundation.
- Management of donated funds and related disbursements will adhere to CAMH Foundation's policies related to giving, investments and grants as approved by the CAMH Foundation Board of Directors. The Foundation retains a portion of each gift for supporting expenses, social change programs and other highest priority needs in support of CAMH.

Licenses and Fees

- Any fees required for licenses will be paid for by The Third Party.
- CAMH Foundation will not apply or hold any licenses

Insurance

- CAMH Foundation insurance will not cover Third Party Events.
- The Third Party is responsible for obtaining insurance for the Third Party Event.

Tax Receipting

- Tax receipts are issued in accordance with the rules and regulations of CRA CAMH Foundation will issue official charitable tax receipts for all donations of \$10 or more made by individuals directly to CAMH Foundation, online or by cheque (payable to CAMH Foundation).
- If donations are collected by the Third Party Event, official charitable tax receipts will only be issued to individuals that make donations of \$10 or more without receiving any product or tangible item in return. The full name and address (including postal code) of the donors must be provided.



- CAMH Foundation does not issue official charitable tax receipts for sponsorships, donations of gift-in-kind items or purchases of raffle tickets, green fees, live or silent auction items.
- Event tickets or event registration fees may be eligible for a partial tax receipt depending on the circumstances. To explore this possibility please speak to us.
- Business Acknowledgement letters will be issued for corporate gifts.

Staff and Volunteer Resources

- The Third Party will provide all staffing for the event unless otherwise agreed upon by CAMH Foundation and the Third Party.

Print and Promotional Materials

- Any use of CAMH Foundation's name or logo is prohibited unless CAMH Foundation authorizes the Third Party to use the mark. All print and promotional materials and media communications must be approved by CAMH Foundation and comply with existing guidelines regarding the use of CAMH Foundation logo.
- The Third Party shall ensure that its advertising makes it clear that the Third Party Event is being carried out by the Third Party and that the net proceeds of the Third Party Event will be donated to the CAMH Foundation

Privacy

CAMH Foundation is committed to protecting the privacy of our donors and adheres to privacy regulations as outlined in our privacy policy.



Event Proposal Application

Please note that this application must be submitted to CAMH Foundation 30 days in advance of your event for approval.

Contact Information

Name of Group/ Company/ Individual planning the event: _____

Name of Contact: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Telephone: Home _____ Business _____ Mobile _____

Email: _____

Event Description

Name of Proposed Event:

Brief Description of the Proposed Event:

What was the inspiration for the Proposed Event?

Event Date: _____ Event Time: _____

Event Location & Address: _____

Will this be an annual event? Yes No

Has this event taken place before? Yes No



How many people do you anticipate will attend the event? _____

How will funds be raised? (E.g. ticket sales, pledges, etc.) _____

Proposed Event Budget

Please list expected revenues and estimated expenses. All costs are to come out of event proceeds or to be paid by the event organizer. Note that we realize these figures are estimates, so use your best judgment; we will not hold you to these numbers. If necessary, please attach on a separate page.

Revenue

Sponsorship \$ _____

Donations \$ _____

Ticket Sales \$ _____

Other \$ _____

Total Revenue \$ _____

Expenses

Venue \$ _____

Food/ Beverage \$ _____

Printing \$ _____

Advertising \$ _____

Other \$ _____

Total Expenses \$ _____

Net Profit \$ _____

Promotional Materials

The Centre for Addiction and Mental Health Foundation is pleased to provide promotional materials for your fundraiser. Please check off your requirements below:

CAMH Posters

CAMH Informational Materials

Other (Please specify and we will do our best to accommodate)



Agreement

As the individual responsible for coordinating the above proposed event, I understand and agree that all publicity for the proposed event must be approved by CAMH Foundation prior to release.

I/We the Third Party understand that the Third Party Event is the sole responsibility of the Third Party and CAMH Foundation shall not be responsible for any expenses or actions related to the Third Party Event.

CAMH Foundation or CAMH is not responsible for any accidents or damage to person or property that may occur during the course of the event and the Third Party will arrange that suitable insurance be in place prior to staging the Third Party Event.

I/we, hereby certify, as the Third Party, that I/we have read, understood, agree to and will abide by all CAMH Foundation policies and guidelines for Third Party Events as outlined in this agreement.

Signature for CAMH Foundation

Third Party Organizer Signature

Print Name

Print Name

Date

Date

Centre for Addiction and Mental Health Foundation abides by all Canada Revenue Agency guidelines concerning the issuance of tax receipts. If you have specific questions about your event please contact:

Lidia Franchitto
CAMH Foundation
100 Stokes Street, 5th Floor
Bell Gateway Building
Toronto, Ontario M6J 1H4

Email Lidia.Franchitto@camh.ca
Telephone: 416-535-8501 ext. 36169
Fax: 416-979-6910

Or visit www.supportcamh.ca/events

Please mail, email or fax the completed application to the attention of Lidia Franchitto.