



THIRD PARTY EVENTS GUIDELINES

Special events are the responsibility of the third party, but we are available for questions and guidance. Below we have outlined some guidelines to help with your fundraising event.

All third party fundraising events in support of the Hotel Dieu Shaver Foundation “the Foundation” or the Hotel Dieu Shaver Health and Rehabilitation Centre “the Hospital” are required to:

- a) Have consent and approval of the Executive Director of the Foundation
- b) Be consistent with the Hospital’s mission and values
- c) Benefit the Hospital’s operations and programs
- d) Inform the Foundation if the third party event is to benefit other charity partners

1. Donations / Tax Receipts

The Hotel Dieu Shaver Foundation has developed the following policies in accordance with the Canada Revenue Agency (CRA).

A tax receipt is given to people who make a personal donation of \$10.00 or more directly to Hotel Dieu Shaver Foundation, and are issued only where the donor receives no benefit for the contribution.

At the discretion of the Foundation, a gift-in-kind (item or service) charitable donation receipt will be issued to individuals, and a business acknowledgement letter to businesses provided that the Event Organizer(s) supplies adequate documentation to verify the Fair Market Value of the item(s) donated. Please check with the Foundation to confirm eligibility. Fair Market Value will be established by providing the Foundation with:

- a) A purchase invoice or other proof of purchase of the item
- b) An independent third party appraisal and value of the item. All costs of appraisal are borne by the Event Organizer(s).
- c) A current price list for the item at a recognized commercial enterprise operating independently of the donor.

Also not eligible for tax receipts are:

- a) Sales of raffle tickets, admission tickets, auction items and other goods that provide a benefit to donors
- b) A tax receipt may be available for a portion of the admission price if a ticket or entrance fee exceeds the Fair Market Value of the benefits received. This must be discussed and approved by the Foundation well in advance of the event date.
- c) Services by the Foundation including personal, professional or legal services
- d) Tax receipts will not be provided directly to third party event organizers.
- e) Gifts-in-kind not eligible for tax receipts include gifts of professional/personal services of an individual, gifts by a company of its principal product or service, donations of old clothes or furniture, etc.
- f) Tax receipts cannot be processed until the funds are received, and cannot be issued for proceeds of an event. The total amount of receiptable donations the Foundation is able to receipt for an event cannot exceed the total Net Revenue that the Foundation receives from the event.



We require the following information to properly process a tax receipt:

- Donor's Name
- Donor's Address (including postal code)
- Donor's Telephone Number
- Amount given and amount tax receipt to be issued for
- Method of payment

2. Sponsorships

Please provide a list of sponsors who have donated to or sponsored your event and include a description of their donation and/or sponsorship plus the retail value. This allows the Foundation to better recognize partners in our community, and to issue a business acknowledgement letter after the event.

- a) The Foundation will have final approval of event sponsors
- b) The Foundation will not solicit sponsors on behalf of the Event Organizer(s), nor will it provide contacts for sponsorship
- c) Any third party contacting potential sponsors must disclose the nature of the third party arrangement and must position the Foundation as a recipient of the event proceeds, not the host or sponsor of the event.

3. Logo Use

It is important for the Foundation to maintain brand integrity and consistency in dealing with the public. The Foundation requires third party event organizers to acknowledge our name as either the Hotel Dieu Shaver Foundation or the Hotel Dieu Shaver Health and Rehabilitation Centre.

- a) The Foundation will, in its discretion and upon prior written approval, allow the use of its name and logo by the Event Organizer(s) to promote the event.
- b) Any use of the logo must be approved prior to its use, and will remain the property of the Foundation
- c) The Foundation reserves the right to withdraw the use of its name and logo at any time leading up to and during an event without liability or obligation, and relinquish support of any third party event that does not abide by the policies, criteria and guidelines set out in this agreement.

4. Event Promotion and Solicitation

- a) The Foundation will have final approval on all promotional materials including brochures, flyers, advertisements, publicity and/or media communications relating to its participation in the fundraising event
- b) The Foundation will, at its discretion and depending on supplies and reasonable requirements, provide existing in-house promotional materials
- c) The Foundation will not provide any donor, staff or volunteer contact lists
- d) All sponsorship solicitation lists must be reviewed and approved by the Foundation
- e) Event materials must clearly indicate that the Foundation is a beneficiary of funds derived from the event.
- f) The Organizer may respond to media enquiries relating to the Event, however, inquiries
- g) relating to the Foundation or Hospital must be forwarded to the Foundation.



5. Liability and Accountability

The Foundation and Event Organizer(s) will ensure that fundraising events do not proceed without prior approval of the Foundation and contractual agreement between the Event Organizer and the Foundation.

The Foundation and/or the Hospital cannot and does not assume any type of liability for your event. In particular,

- a) Third Party Event organizers will be responsible for any financial losses or unsettled accounts.
- b) We will be advised if the event is to benefit other charitable organizations, and what percentage of the final net revenue they will receive
- c) We will be provided with reasonable prior notice of any third party event cancellation
- d) No oral or written commitments or agreements will be entered into by the Event Organizer on behalf of the Foundation or the Hospital, nor should the Organizer attempt to commit the Foundation or the Hospital to any obligation of any sort
- e) All contracts of the Event Organizer relating to the Foundation must be submitted to the Foundation for review and approval prior to signing
- f) We will not underwrite any third party event, or expenses or salaries related to third party event organizers.
- g) Organizers of events involving physical activity should ensure that all participants sign disclaimer forms waiving all claims of physical, personal or financial liability against the Foundation and the Hospital.
- h) Organizer agrees to waive any and all claims and/or liabilities and to release the Foundation and the Hospital from any and all claims and/or liabilities for any loss, damage, expense or injury that the Organizer or its executors, administrators, assigns, successors, heirs, and/or legal or personal representatives may suffer as a result of the Event, due to any cause whatsoever, and further agrees to hold harmless and indemnify the Foundation, the Hospital, its Board of Directors, employees and volunteers from any and all liability for any loss or damages to any third party resulting from the Event.

6. Licenses and Fees

It is the sole responsibility of the Third Party Event Organizer(s) to pay any and all applicable fees for licenses/permits, and the Event Organizer(s) are responsible for filing post events forms/reports. Third party events involving licenses and fees will abide with all government regulations and applicable laws.

Any third party gaming events (including raffles, 50/50 sales and licenses) or special permits such as liquor and licenses and fire permits will conform to all levels of government (federal, provincial, municipal).

The Event Organizer(s) will provide to the Foundation:

- a record of revenues and expenses
- periodic status updates to the Foundation on an agreed-upon basis

7. Staffing and Volunteers

While the Foundation is committed to supporting third party fundraising events, it is the responsibility of the Third Party Event Organizer(s) to provide staffing and recruitment of volunteers for the event.

Upon request, the Foundation is pleased to provide a letter of thanks to recognize volunteers for their contribution.



8. Privacy

All information obtained and used by the Foundation will be treated with the utmost confidentiality and security in accordance with Foundation policies, and these requirements will be adhered to by the Event Organizer(s) and associated employees, contractors, agents and volunteers.

THIRD PARTY EVENTS GUIDELINES

I have read, understand and agree to be bound by the Events Guidelines as identified above.

Authorized Signature of Event Organizer _____ Date: _____

Authorized Signature of the Foundation _____ Date: _____



THIRD PARTY EVENTS APPLICATION

Thank you for supporting Hotel Dieu Shaver! This application must be completed and submitted to the Hotel Dieu Shaver Foundation by the event organizer at least four (4) weeks prior to the event date.

NAME/ORGANIZATION: _____

CONTACT ADDRESS: _____

CONTACT NUMBER: (____) _____ **CONTACT EMAIL:** _____

EVENT NAME/EVENT TYPE (GOLF TOURNAMENT, BBQ, etc.):

DATE & TIME OF EVENT: _____

VENUE NAME: _____

VENUE ADDRESS: _____

ADDITIONAL INFORMATION:

How many attendees are you expecting? _____ How many attendees are you expecting? _____

Will this be an annual event? YES NO

How are you promoting your event? _____

What support would you like from the Foundation?

- Permission to use logo
- Information materials, i.e. our brochure, newsletter. Amount required _____
- Promotional materials, i.e. notepads, stickers. Amount required _____

If possible, would you like a representative of the Foundation to:

Attend the event? YES NO

Speak at the event? YES NO

Financial Information

Estimated income from the event: \$ _____ Estimated expenses of the event: \$ _____



Estimated donation to HOTEL DIEU SHAVER FOUNDATION: \$ _____ or % _____

How would you like to designate your funds raised:

- Area of greatest need
- Palliative Care
- Physiotherapy
- Rehabilitation equipment

Will you be providing tax receipts to supporters who make donations by cheque? YES NO
(Please see Item 1 of the Event Guidelines for tax receipt information)

Will any other organizations benefit from this event? YES NO Name: _____

Are there any other details about the event:

Please forward this application to:
Hotel Dieu Shaver Foundation
541 Glenridge Ave
St. Catharines, ON L2T 4C2

Email: stephanie.farr@hoteldieushaver.org

Fax: 905-687-4871

Phone: 905-685-1381 ext. 84214

Event donations must be received within 90 days of your event. Please include a summary of your event expenses and profits.

For office use only:

- Approved
- Not approved

Signature: _____

Date: _____

Comments: _____