

## Third Party Events Planning Guide

**Thank you** for your interest in planning an event or program to benefit Northumberland United Way. Benefit events can take many forms from golf tournaments to black tie galas and walk-a-thons. We are open to exploring these and other ideas with you.

The United Way is fortunate to receive many inquiries and proposals from companies, individuals, families and staff groups that would like to support the United Way.

\*\* If you would like to or are planning an event or program to benefit Northumberland United Way submit a completed and signed Event Proposal form.\*\*

These documents must be submitted at least two months prior to the event or program date. Each proposal is carefully reviewed to see if it is feasible and fits with our organization's goals and objectives.

These are some of the criteria we will use to evaluate proposed events:

- Does the event support the mission and image of the Northumberland United Way?
- Does the event have a realistic budget, timeline and plan?
- What are estimated proceeds from the event?
- Who will chair the event? Will there be other members of the committee?
- Does the event honour an individual or mark a special occasion?
  Will the event raise funds for areas of priority as determined by the Northumberland
  United Way Board of Directors or do you have a specific area in mind?

Please be aware of the following: Northumberland United Way does not advance funds, provide donor lists or solicit sponsorship revenue for third party fundraising events. We can provide limited support. Our office's ability to provide services for your event is limited by staff size and internal fundraising obligations. (We state this information in advance so that there are no disappointments or misunderstandings with regards to our ability to participate in and support your fundraising event). The use of any Northumberland United Way brand, logo or name will require written authorization from the Office prior to usage.

Once again, thank you for your interest in planning an event or program to benefit Northumberland United Way. We appreciate your support.

Please allow two weeks for the United Way Office to review and respond to your proposal.

## Northumberland United Way Policies & Procedures for Third Party Fundraising

Third party fundraising programs must fit the Northumberland United Way mission, vision and values statement.

The Mission of Northumberland United Way is to improve lives and build community by engaging individuals and mobilizing collective action.

United Way is dedicated to improving the quality of life of all people in our communities and helping individuals, families, neighbourhoods and communities realize their full potential. United Way is a leader in understanding root causes of social issues and bringing together people and resources to create real change in people's lives, meaningful, positive, lasting change. Not just for today, but for the long term. And that means a better community for us all.

### **Permission**

The Northumberland United Way has a fiduciary responsibility to ensure that the Northumberland United Way name is being used properly, that funds are being handled and accounted for in a responsible manner, and that fundraising is being conducted in a manner that is consistent with our mission and public image.

- All fundraising events require written permission from the Northumberland United Way in advance. Do not make public announcements or promote the event until you have received written approval of your event proposal.
- Fundraising events must comply with all relevant provincial and federal laws.

## **Event Timing**

It is the policy of Northumberland United Way to maintain a list of all events and other fundraising efforts benefiting the United Way. This includes all activities of the Northumberland United Way office and events sponsored at-large by others in the community.

It is the responsibility of the event coordinator to approve the fundraising date with the Northumberland United Way Office to ensure no conflict exists between events. There must be sufficient time between events to maximize support, enthusiasm and attendance for your event.

### **Event Promotion & Logo Usage**

The Northumberland United Way must review all promotional materials (including without limitation press releases, public service announcements, scripts, posters, brochures) before they are used.

The logos of Northumberland United Way cannot be reproduced without permission.

The Northumberland United Way will assist if requested by promoting the event, when appropriate, through:

- Northumberland United Way web site: As a link to the event or organization's web site can be requested
- NUW News an email newsletter
- E-blasts to organizations and individuals who have asked to be informed of events from Northumberland United Way and its program Info Northumberland.

## **Event Language**

- Any promotional materials must expressly state that your event is raising funds to benefit the Northumberland United Way.
- Any promotional materials must properly characterize the use for which the donation will be made. For example, "Proceeds benefit the Northumberland United Way Back Pack for Kids Program."

### **Financial Guidelines**

- Event expenses must be less than fifty percent (50%) of the total amount raised, excluding in-kind donations.
- If event expenses are greater than the total collected, the group conducting the event is responsible for payment of these additional expenses.
- Within 30 days after the last day of the event, please arrange for the presentation of a cheque made payable to *Northumberland United Way*.

## <u>Sponsorship</u>

- Northumberland United Way cannot solicit sponsors for your fundraising event and will not provide any donor contact information.
- □ Printed materials and other information should state, "Proceeds will benefit Northumberland United Way."

# In-Kind Sponsorship

- In-kind sponsorship is defined as a donation of a product or service such as food, beverage, printing or silent auction items.
- Northumberland United Way will not solicit in-kind sponsors for your fundraising event.
- In-kind sponsors should be acknowledged at the event or in follow-up.
- The value of in-kind donations from sponsors should not be included in your total event revenue.

## <u>Liability, Changes & Cancellation</u>

## Liability:

- You agree to indemnify and hold harmless Northumberland United Way and all its officers, directors, and employees from any and all claims and liabilities in any way related to the event.
- Fundraising events and program must comply with all relevant provincial and Federal laws.
- Event organizers must discuss liability insurance coverage and waivers with the Northumberland United Way prior to signing the Event Planning Form.

### **Changes:**

□ You must immediately advise Northumberland United Way of any changes in your fundraising event.

#### Cancellation:

• There may be times when a fundraising event must be canceled. Northumberland United Way, through any of its directors, officers and senior administrators retains the right to cancel the fundraising event. You hereby agree to cancel the event, if so directed, and further agree to release Northumberland United Way and its officers, directors, and employees from any and all liability in connection with such action.

## What the Northumberland United Way Can Do For You

- Offer event planning expertise and advice.
- Acknowledge your direct contributions to Northumberland United Way.
- Approve the use of the Northumberland United Way name and/or logos for your event.
- Provide a letter of support to validate the authenticity of the event and its organizers.
- Provide limited existing materials for your event such as flyers, brochures, and a United Way banner.
- Acknowledge your event by publishing the details, such as event name, event description, locations and contact information.

## Things to Remember

- Complete and sign the event proposal form, then return it to the Northumberland United Way at least 2 months prior to the date of your event.
- Establish goals that are realistic and measurable.
- Identify your audience/people who you think will be interested in attending.
- Plan a budget. Identify sources of income and all expenses. If you keep costs down, you may generate a larger donation something everyone will feel good about.
- All promotional and publicity materials must be approved by the Northumberland United Way to ensure that you are using the United Way name, logo and charitable language correctly.
- Collect the funds and submit the proceeds. We ask that all funds be forwarded to Northumberland United Way within 30 days of the conclusion of the event. The list of event donors and their information must also be included.
- Until permission is received, the name of Northumberland United Way cannot be used for any purpose and contributions cannot be solicited.
- The forms you submit for the event are only valid for that event. You must submit a separate form for each event.

Thank you again for your interest in planning an event to benefit Northumberland United Way. Philanthropic contributions such as yours are instrumental and help us to meet the needs of our community.

A Northumberland United Way representative is always available to answer your questions or for guidance. Thank you!

## For more information, please contact:

Dianne Turk, Resource Development Manager Northumberland United Way 600 William St., Suite 700 Cobourg, ON K9A 3A5 905-372-6955 800-833-0002 dturk@nuw.unitedway.ca

Approved:

## **FORM A -DONATION RECORDS**

The event coordinator should create a spreadsheet that contains this information for sponsors, donors and in-kind sponsors. This spreadsheet must be turned in to Northumberland United Way within 30 days after the event.

## **SPONSORS & DONORS:**

- First and Last Name (Company or Organization Contact Name)
- Company or Organization
- Address
- City
- Province
- Postal Code
- Phone Number
- Donation Amount

## **IN-KIND SPONSORS:**

- First and Last Name (Company or Organization Contact Name)
- Company or Organization
- Address
- City
- Province
- Postal Code
- Phone Number
- Item Donated
- Value of Item Donated

Approved: