

## Third Party Fundraiser Information Kit

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### Who are we?

The Thorpe Recovery Centre is an addiction treatment facility in Blackfoot, Alberta that has been operating since 1975. We help adults and their family members overcome addiction in their lives. We provide direct services to adults struggling with substance misuse disorders and process dependencies as well as support services to adult family members, partners, and children who are affected by their loved one's behaviour. Programs include: medically supported detox, residential addiction treatment, continuing care, intensive (short-term) programs, and outpatient counselling.

As a charity and non-profit organization, the facility is governed by a society – a group of invested individuals consisting of alumni, community members, and former employees. Our *Mission* is to be a leading, community-based organization that provides strength, hope, and healing through programming and support to those affected by addiction and mental health needs. Our *Vision* is that together we will improve lives through overcoming addiction and mental health concerns.

We *Value* Accountability, Communication, Respect, Integrity, and Safety.

### How can you help?

Thanks to the generosity of the community and supporters like you, we have helped over 13,000 lives. Your role as a third party fundraiser will elevate our profile in the community and help our dedicated team to continue providing life-changing services for years to come.

Third party fundraisers do not have to be complex or extravagant and they should reflect the mission, vision, and values of our organization. Below is our Third Party Fundraiser Policy to assist you in forming a successful campaign or event.

### What can you help?

There are several projects at the centre you can support:

**Area of Greatest Need:** this tackles our operations, repairs, maintenance, and anything else to help us function efficiently.

**12 Step Garden:** A therapeutic and recreational space built to support overall wellness. You can be a part of its growth by planting trees, building benches and tables, or even build a playground for children visiting or participating in the Children's Program.

**Capital Projects:** By paying off our mortgage on the facility, we will be able to have a greater focus on our direct services and help more people find recovery.

**Treatment Fund:** The Treatment Fund assists individuals in need of treatment access funds for programming at the Thorpe Recovery Centre. Fundraisers benefiting the Treatment Fund will include coordination with the LRHF who manages the fund.

Questions? Contact Us:

Thorpe Recovery Centre  
giving@thorperecoverycentre.org  
780-875-8890

## **Third Party Fundraising Policy**

This policy applies to all Thorpe Recovery Centre affiliates who would like to support Thorpe Recovery Centre through fundraisers that are not run by Thorpe Recovery Centre staff, volunteers, or society members.

### **Governance**

The interpretation, negotiation and development of terms and conditions relating to fundraising, including third party events, is to be coordinated through the Board of Directors or its designate. Terms within this policy shall not be in conflict with any other policy. Enforcement of these policies will be coordinated through the CEO or their designate.

### ***Policy***

Third Party Fundraisers are required to:

- Be consistent with the mission and values of the Thorpe Recovery Centre.
- Maintain a positive presentation and give the Thorpe Recovery Centre positive exposure and increased public awareness.
- Provide an overall financial net gain to the Thorpe Recovery Centre operations or programs.
- Provide positive marketing/public relations exposure.

The Thorpe Recovery Centre reserves the right to:

- Refuse involvement, and the use of its name and logo, in any event that does not meet with its expressed approval.
- Relinquish support of any Third Party Fundraiser that does not abide by the policies, criteria, and guidelines set out in this agreement, without any liability or obligation.

Evaluation of Third Party Fundraisers:

1. A proposal of the Third Party Fundraiser must be submitted for review a minimum of 30 business days in advance of the event.
2. Completed proposals will be reviewed by the Board of Directors and/or their designate.

Thorpe Recovery Centre will approve Third Party Fundraisers in writing to the requesting body and sign this agreement with the Third Party Event organizer(s).

### Approved Third Party Events:

The Third Party Fundraiser Organizer(s) and the Thorpe Recovery Centre are required to adhere to the following guidelines:

#### 1. The Thorpe Recovery Centre Brand

- a. It is important for the Thorpe Recovery Centre to uphold brand integrity and consistency in dealing with the public. The use of Thorpe Recovery Centre “Proud Supporter” logo is permitted for Third Party Fundraisers.
- b. The use of the Thorpe Recovery Centre name is permitted only with Thorpe Recovery Centre approval.

#### 2. Promotional Materials

- a. The Thorpe Recovery Centre will have final, signed approval on ALL promotional materials (e.g., brochures, flyers, advertisements, public, and media communications.)
- b. Thorpe Recovery Centre must review and approve all promotional materials (including, but not limited to, letters, brochures, press releases, flyers, and advertising) prior to distribution.
- c. Thorpe Recovery Centre name is not permitted on any product packaging without prior approval.
- d. All promotional materials must clearly state the percentage of proceeds or portion of ticket price that will be donated to Thorpe Recovery Centre.

#### 3. Donations and Sponsorships

Proposals will provide a list of sponsors who will be asked for support, including a description of their donation and/or sponsorship, plus its retail value as well as contact information. This information will allow the Thorpe Recovery Centre to better recognize partners within the community.

- The Thorpe Recovery Centre will have the final approval of the solicitation of all sponsors.
- The Thorpe Recovery Centre will not solicit sponsors on behalf of Third Party Event Organizer(s), nor will they provide contacts for sponsorships.

#### 4. Gaming (including Raffles, 50/50 Sales and Licenses)

- Third Party Fundraisers involving licenses and fees will conform to government regulations (federal, provincial and municipal) including requirements by the licensing body on the distribution and use of funds. It is the sole responsibility of the Third Party Event Organizer(s) to fill out and submit all such applications.
  - A minimum of 10 business days must be given to the Thorpe Recovery Centre to review such licenses.
  - Third Party Event Organizer(s) will pay the fees for said licenses and are responsible for filing post fundraiser forms/reports.
5. Alcohol Use & Sale
- Thorpe Recovery Centre recognizes the social acceptability of alcohol at public events. As such, Third Party Fundraisers selling or serving alcohol is permitted with the following conditions:
    - Any promotion, sale, or service of alcohol cannot be in conjunction or mention of the Thorpe Recovery Centre or its services.
    - Promotional items of the Thorpe Recovery Centre, including its logo, cannot be proximal to the promotion, sale, or service of alcohol.
6. Substance Use & Sale (including legal and illicit drugs, and tobacco products)
- Thorpe Recovery Centre will not participate in any fundraisers that promote the use or selling of any legal or illicit mind-altering substances including tobacco products.
7. Financing and Insurance
- Only the final net proceeds will be processed by Thorpe Recovery Centre. Under no circumstances will Third Party revenues and expenses flow through the Thorpe Recovery Centre.
  - The Thorpe Recovery Centre will not underwrite any Third Party Fundraiser and the Thorpe Recovery Centre insurance will not cover Third Party events.
8. Tax Receipts and Gift Acknowledgements
- The Thorpe Recovery Centre may provide receipts for income tax purposes, for qualified gifts over the amount of \$25. Charitable receipts or record of contributions will be made only in the instance where the fair market value can be provided or reasonably estimated. Donations collected through CanadaHelps.org or other online donation platforms will be issued by the web-based platform. Thorpe Recovery Centre cannot create or duplicate tax receipts for any other donation platform or organization.
  - The Thorpe Recovery Centre reserves the right to issue or not issue any receipts at its sole discretion, in accordance to Canadian Revenue Agency rules and regulations.

- Thorpe Recovery Centre adheres to all relevant privacy laws.

#### 9. Gifts-In-Kind

- Gifts-In-Kind are gifts of property, rather than cash and marketable securities. These include (but are not limited to) gifts of supplies, equipment, books and artwork.
- Charitable receipts or record of contributions will be made only in the instance where the fair market value can be provided or reasonably estimated.
- Gifts-In-Kind not eligible for tax receipts include a gift of professional/personal services from an individual, a gift by a company for its principal product or service, purchase of lottery tickets, and donations of used clothes or furniture etc.

#### Exemptions to Policy

- Programs that raise money on commission;
- Events that encourage/involve behaviour that is counter to the Thorpe Recovery Centre mission and/or programmatic activities other than what is outlined within this policy;
- Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity;
- Direct solicitation (including, but not limited to, door-to-door canvassing, telemarketing or broad-based internet broadcasting).

#### Responsibilities

Third Party Fundraiser Organizer(s) will:

- Keep a record of revenues and expenses for submission to the Thorpe Recovery Centre if requested.
- Provide periodic status reports to the Thorpe Recovery Centre on an agreed-upon basis.
- Provide reasonable notice of any Third Party Fundraiser cancellation.
- Will inform the Thorpe Recovery Centre if the Third Party Fundraiser is to benefit other charity partners.
- Will be responsible for any financial losses or unsettled accounts.

Third Party Fundraiser Organizer(s) will not:

- Name the Thorpe Recovery Centre in, or sign contracts on behalf of Third Party Event Organizer(s) without the Thorpe Recovery Centre's written consent.

Thorpe Recovery Centre will provide the following upon request:

- Promotion on the Thorpe Recovery Centre website and social media pages.
- Representatives from the Thorpe Recovery Centre including staff, board members, and/or society members to be present at event(s) and available for media opportunities including, but not limited to, interviews, photographs, and speeches.
- Guidance on marketing and branding of the Thorpe Recovery Centre including the use of official logo for approved promotional materials.
- Volunteer thank you letters.
- Receipting to eligible donors.
- A review of applications for consistency with Thorpe Recovery Centre mission, vision, and policies.
- A review of potential sponsors.
- A review of gaming licenses.
- Promotional materials (limited to Thorpe Recovery Centre electronic fact sheets and corporate brochures).
- Designation of funds for specific projects and/or services will be left to the discretion of the Thorpe Recovery Centre based on need and highest priorities.

#### Staffing and Volunteers

- The Third Party Event Organizer(s) will provide all staffing and recruitment of volunteers for said fundraiser.
- Upon request, Thorpe Recovery Centre or the beneficiary affiliate will provide a letter to volunteers recognizing them for their volunteer hours.

#### Agreement

This policy shall be signed by designate of the Third Party group and by an authorized representative of the Thorpe Recovery Centre no later than 10 business days prior to the fundraiser.

### Violations

Violations of this policy can result in revocation of agreement of the Third Party Event and return of funds from beneficiary to the Third Party Event organizer. All liabilities are with the Third Party Event Organizer.



## Planning Your Event

Before you start, here are a few important things to consider before you start planning your event:

- Get in the know. People are more likely to donate or volunteer to help if you can clearly articulate why a cause is important and why you need their support.
- A good idea can sell itself. Brainstorm, research and test out your fundraising idea on friends, family and colleagues. Would they be likely to attend and/or give?

Event ideas: Auctions (art, silent, service) Bottle Drive, Trivia night, Movie night, Sports tournament, Benefit concert, School dance, Rummage sale, Walk/Swim/Skip-a-thon, Casual day, 50-50 draw, Fashion show, Food Sale, Gala event, Games tournament, Cook off, Charity speed dating, Casino night, Benefit BBQ, Speaker series.

- Know your audience. Who are you trying to attract to your event? Tailoring the size of your event to the size of your potential audience helps you narrow options for suitable events and venues, and will give you a better idea of how much advance planning and promotion will be required.
- Set realistic goals. Setting a realistic fundraising goal helps motivate your team members and gives your supporters something to work towards. This often encourages them to be more generous to ensure you achieve your goal.
- Don't over-commit yourself. Give yourself enough time and enlist adequate help to ensure all the elements of your event can be completed successfully. You might consider starting with a small event and work your way up to organizing larger events as you gain more experience.
- Have a back-up plan. Make sure you have a contingency plan, especially if your event is dependent on unpredictable factors like the weather. Setting a rain date, or arranging an indoor venue as a backup, may take a bit of extra planning up front but it will help ensure that the results of your hard work aren't limited by factors you can't control.
- Timing is everything. The timing of your event often determines how successful it will be. Check out whether there are competing events on the day or time you have chosen. To give your event special relevance, schedule its theme to coincide with special days.

## Promoting your event

**Online promotion:** Social networking sites like Facebook, Instagram and Twitter are quick and efficient ways to spread the word about your event to all your friends and followers. Be sure to tag or mention Thorpe Recovery Centre (@ThorpeRecoveryCentre) so we can share the post with our followers as well. Also check out online event calendars serving your community such as municipal or community centre websites to see if they will accept a posting for your event.

**Posters:** Be sure to send them to TRC prior to sending out for final approval.

**Email:** Blast to friends, co-workers and your entire network. Ask them to forward on the email to their network and be sure to abide by the Canadian Anti-Spam Legislation.

**Media:** If you're planning a large event, you might consider sending a press release to local newspapers, radio and TV stations to try to get editors interested in doing an advance story, covering your event or taking photos. Local news outlets love human interest stories, but they receive so many requests to cover fundraising events you often need to have a unique angle, so don't be discouraged if they don't respond to your release. If a reporter does contact you, tell them about your event, what you have planned, why you're doing it, etc., but if a reporter has any questions about Thorpe Recovery Centre, please refer them to us directly at 780.875.8890 or 1.877.875.8890. If the media doesn't cover your idea for a story, you can still get media promotion on their daily event calendars by submitting a media advisory a minimum of one week in advance. Be sure to follow up with all media outlets a couple of days in advance of your event to make sure they received your advisory and intend to list it on their event calendars.

## **Planning Checklist**

Planning an event is simple if you're organized. Use these step-by-step checklists to assist you in remembering everything that could help make your event a success!

### **Before your event**

- ✓ Brainstorm fundraising ideas
- ✓ Check into any possible safety or legal issues such as whether permits are required
- ✓ Determine how many people you will need to help you execute your plan
- ✓ Enlist volunteers – friends, family, colleagues or other motivated people
- ✓ Let Thorpe Recovery Centre know about your event by completing and returning the Third Party Fundraising Agreement
- ✓ Plan your budget
- ✓ Find a suitable location or platform
- ✓ Think about any entertainment needs you may need (e.g. music, MCs, AV equipment, band, comedian, auctioneer, etc.)
- ✓ Schedule your event
- ✓ Promote your event, ensuring all materials with the Thorpe Recovery Centre name/logo are approved prior to use

### **During your event**

- ✓ Assign someone to be responsible for handling the donations
- ✓ Have a Thorpe Recovery Centre Donation Form handy for donations of \$25 or more (this will be sent to you after your event has been accepted by Thorpe Recovery Centre)
- ✓ Display and/or distribute Thorpe Recovery Centre brochures.

### **After your event**

- ✓ Collect the funds
- ✓ Thank your volunteers
- ✓ Thank your donors
- ✓ Compile all of your donation forms and money collected. Send to Thorpe Recovery Centre within two weeks of the event.
- ✓ Learn from your mistakes and successes! Evaluate your event and take note of what worked and what didn't. Keep notes of useful contacts for future events.

We are here to help! Please keep in touch with us as you move through the process of planning and executing your event/initiative.

## Third Party Fundraiser Application

*All information is required.*

<b>Date of Application</b>			
<b>Company/ Group</b>			
<b>Contact Name</b>			
<b>Email Address</b>			
<b>Phone Number</b>			
<b>Mailing Address</b>		<b>Province</b>	
<b>City</b>		<b>Postal Code</b>	
<b>Tell us about your idea to fundraise for Thorpe Recovery Centre:</b>			
<input type="checkbox"/> Campaign <input type="checkbox"/> Event <input type="checkbox"/> Other: _____			
<b>Describe:</b>			
<b>Target Demographics:</b>			
<b>Date(s) of Fundraiser</b>			

<b>Location of Event with Address</b>	
<b>Fundraising Goal(s)</b>	

<b>How will your event be promoted? (check all that apply)</b>	<input type="checkbox"/> Newspaper <input type="checkbox"/> Posters <input type="checkbox"/> Radio <input type="checkbox"/> Social Media <input type="checkbox"/> TV <input type="checkbox"/> Website <input type="checkbox"/> Other: _____
<b>Fundraiser Website</b>	
<b>Social Media Handles</b>	
<b>Hashtags</b>	#ThorpeRecoveryCentre
<b>Support Requested from TRC:</b> <i>Enclose additional information relating to requests including speaking guidelines, volunteer roles, and any other information that will assist in recruitment.</i>	<input type="checkbox"/> Speaker at Event <input type="checkbox"/> Representatives at Event <input type="checkbox"/> Program Materials (Brochures) <input type="checkbox"/> TRC Banners <input type="checkbox"/> Volunteers: _____ <input type="checkbox"/> Other: _____

**Additional Comments or Questions:**

- I have read through the Thorpe Recovery Centre Party Fundraising Kit found on the Thorpe Recovery Centre website.
- I understand and agree to all of Thorpe Recovery Centre policies and procedures regarding Third Party events.

*Submit Complete Application to [giving@thorperecoverycentre.org](mailto:giving@thorperecoverycentre.org)*