



Event Proposal Application & Information Package

Any questions, contact:
Diana Panacci

Hats On, Office Coordinator

905-850-3030

E-mail: info@hatsonforawareness.com

Third Party Events Toolkit

Thank you for your interest in supporting Hats On For Awareness (Hats On, HOA) Foundation by raising funds! Your donation to Hats On helps us fund mental health programs which enhance the lives of those living with and affected by mental illness and addictions, focusing on 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 Hats On.

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

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 Hats On.
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 Hats On. All proceeds from the event must be forwarded to Hats On 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 Hats On help?

Depending on the scale of your event the Hats On 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 Hats On website
- Provide promotional material such as HOA posters and HOA informational materials
- Permit the use of the HOA logo on marketing materials (all promotional materials must be approved by HOA)

Overview of Policy

Hats On 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, HOA follows the Canada Revenue Agency’s (CRA) administrative guidelines on fundraising. These policies place a high burden on charities to monitor Third Party Events. HOA 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 HOA.

In order for the Third Party Event to associate itself with HOA, 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 Hats On For Awareness.
2. Present a positive image and improve public awareness about HOA.
3. Have financial benefits to HOA.

Hats On 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 Hats On
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 HOA.

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 Hats On (for volunteers, promotion, etc).
2. Consistency of the Third Party Event with HOA's mission and values.
3. Positive marketing/public relations exposure for HOA.
4. A budget of the Third Party Event (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 Hats On existing events and promotions.

Guidelines for Approved Third Party Events

Third Party Events approved by Hats On are required to adhere to the following guidelines

Accountability

- The Third Party will provide periodic status reports to HOA on an agreed-upon basis.
- HOA 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 HOA where possible, a minimum of 72 hours prior to the original date of the Third Party Event.
- HOA 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 HOA.
- In addition to HOA policies, Third Party Events will comply with all applicable municipal, provincial, and federal laws and regulations and the Association of Fundraising Professionals Guidelines.

Sponsorship

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

Financing

- HOA 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 HOA.
- Management of donated funds and related disbursements will adhere to HOA's policies related to giving, investments and grants as approved by the HOA Board of Directors. HOA retains a portion of each gift for supporting expenses, social change programs and other highest priority needs in support of HOA and its benefactors.

Licenses and Fees

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

Insurance

- HOA 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. HOA will issue official charitable tax receipts for all donations of \$10 or more made by individuals directly to Hats On For Awareness, online or by cheque (payable to Hats On For Awareness).
- 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.

- HOA 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.

Staff and Volunteer Resources

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

Print and Promotional Materials

- Any use of HOA's name or logo is prohibited unless HOA authorizes the Third Party to use the mark. All print and promotional materials and media communications must be approved by HOA and comply with existing guidelines regarding the use of HOA 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 HOA.

Privacy

HOA 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 Hats On 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

Do you need a HOA representative at your event? Yes No

Do you need a HOA speaker at your event? Yes No



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

How will funds be raised? (E.g. ticket sales, pledges, request for donations, 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

Hats On For Awareness is pleased to provide promotional materials for your fundraiser. Please check off your requirements below:

HOA Posters

HOA 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 Hats On For Awareness prior to release.

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

Hats On For Awareness, its Board of Directors or Benefactors are 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 Hats On For Awareness policies and guidelines for Third Party Events as outlined in this agreement.

Signature for Hats On For Awareness

Third Party Organizer Signature

Print Name

Print Name

Date

Date

Hats On For Awareness abides by all Canada Revenue Agency guidelines concerning the issuance of tax receipts. If you have specific questions about your event please contact:

Diana Panacci
Hats On For Awareness
7695 Jane Street,
Unit 11
Vaughan, ON
L4L 1A8
Email: info@hatsonforawareness.com
Telephone: 905-850-3030

Please mail or email the completed application to the attention of Diana Panacci.