

Third Party Fundraising Guidebook



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About Carefor Health & Community Services

Carefor Health & Community Services, a registered charity and not-for-profit organization, has continued to enhance its services to the people of Eastern Ontario. Including nursing and personal support services, assisted living options, respite services, and support for caregivers and families with loved ones living with Alzheimer's or other dementias, Carefor services continue to meet the needs of the local communities we serve. For over 125 years, Carefor has been keeping families together longer at home by providing home health care and community support services.

Carefor's goal is to help people stay safe and healthy in their homes, where they and their loved ones want them to be. Our client-focused care is unmatched in today's fast-paced health care system, and our commitment to clients, volunteers and staff is unwavering.

Carefor delivers innovative, comprehensive, and timely high quality service to the residents of Ottawa, Pembroke-Renfrew County & Eastern Counties. Our services are available in the comfort of our clients' home, in a retirement facility, or in a community setting. Our skilled staff members work closely with clients, caregivers and other members of the health care team to deliver a flexible and individual plan of care.

Carefor's roots extend back in the late 19th century as the founding branch of what became the first national community nursing and home health care organization in Canada.

Mission

Meeting our clients' health needs for high-quality home care and community support services.

Vision

To be recognized as a leader in the development of a full-integrated healthcare delivery system for our clients.

Values

Respect: we respect the well-being of our clients, co-workers and volunteers as central to our success.

Partnership: We collaborate and work well with our partners.

Excellence: We strive for excellence through education, implementation of best practices, outcomes measurement and evidence-based decision-making

Responsiveness: We go the extra mile in listening to and acting on client and system needs.

Innovation: We pursue creative, cost-effective and environmentally responsive ways to achieve better results.

What is a third-party fundraising event?

A third-party fundraiser is when you, either as an individual or along with a community group, service club, or business, organize your own event and the net proceeds of the event go to support Carefor Health & Community Services' charitable work. Third-party fundraisers are great opportunities for individuals or groups of people who like to be social, creative, plan special events, organize people, collect donations and think outside the box.

Who can organize a third party fundraising event?

This opportunity is a partnership between a business, individual, or organization in the community and Carefor Health & Community Services. The event would be approved by Carefor through a formal application process before beginning event planning. Your organization would be recognized in our newsletter, social media, website and annual report. Depending on the type of activities you organize, you may be eligible for a tax receipt for the contribution.

Why organize a third party fundraising event for Carefor?

Because you are an active, committed community member concerned about declining government contributions and the increasing pressure on our local health care system. Carefor works directly with those hit hardest seniors who require our assistance either in a facility, or at home, and we need your support now more than ever. Hosting a third-party event is a fun and flexible way to make a contribution. We appreciate all of the work and effort that goes into hosting an event. Thank you for your support.

How can we help Carefor with fundraising?

This third-party fundraising guidebook is intended to provide the tools, ideas and information needed as you venture into the fun and rewarding role of fundraising on behalf of Carefor Health & Community Services.

Carefor is able to provide a much more positive experience for people in our community as a result of the volunteers, sponsors and donors who step forward to help us. There are many deserving charities in our local community and as you read through this guidebook, please know that we appreciate your interest, your involvement and your help as we strive to keep families together longer by providing home health care services in our community.

The following suggestions have been developed for organizations who are interested in fundraising on behalf of Carefor Health & Community Services. These broad categories will act as a guide to help you determine what kind of fundraising initiative you would like to carry out.

1 - Host an event or sponsor an activity and make Carefor the beneficiary

For ideas and examples of the types of events or activities that fall within this category, please see pages 5 and 6 in this guidebook.

2 - Carefor can "piggy back" on an existing event, adding a third-party element and receiving the corresponding portion of the proceeds from that event.

Carefor Health & Community Services is the official charity for the event, allowing us to invite members of Team Carefor to collect pledges.

3 - A group or organization can invite Carefor to cooperatively produce an event (by providing promotional assistance, mailing, volunteers, etc.) and share in the profits.

To create your own third-party fundraising event, or to learn more about how you can help, please contact:



Ottawa

Wendy Knechtel
wknechtel@carefor.ca
833-922-2734 x 2298

Pembroke-Renfrew County

Wendy Knechtel
wknechtel@carefor.ca
833-922-2734 x 2298

Eastern Counties

Rhonda Simpson
rsimpson@carefor.ca
833-922-2734 x 4227

Cornwall Hospice

Rhonda Simpson
rsimpson@carefor.ca
833-922-2734 x 4227

Third-Party Fundraising Ideas

These are just some ideas, but really it's up to you!

Fundraising BBQ - This is a great way for local grocery stores, restaurants, caterers etc. to get involved. Contact your local grocery store, ask them to donate some product and for use of their parking lot one Saturday afternoon.

Raffle/Basket - Fill a cooler or basket with fun seasonal items and sell tickets for \$5 each. Tell each of your teammates to contribute 1 or more items to the basket and start selling tickets! As an added incentive, ask your boss to donate a leg to be waxed if your team reaches their fundraising goal.

"Jeans to Work" - have a "jeans tax" at your office. Have colleagues pay \$5 for the right to wear jeans to work for the week/day.

Holiday Gift Wrapping - advertise among your colleagues, clients and friends that your office is participating in a holiday gift wrapping exercise for charity.

Pumpkin carving competitions/Tree decoration challenge - challenge other divisions, branches and even other tenants in your office building to a pumpkin carving competition. Charge an entry fee to competitors and charge \$1 per vote, encourage bragging rights and try to get some prizes donated for the most creative, most special effects, best design.

Chili/Meatball/Crock-Pot Cook-off - Invite your colleagues and bosses to a crock-pot competition. Choose an easy to eat food (chili, meatballs etc...) and charge the rest of the office \$5 to taste the entries. Be sure to choose a judging panel in advance, and offer a soda and some bread to make it an office lunch.

Bake Sale - If you're located in an office building, speak with the office manager and ask if you can use the main lobby for a bake sale. Recruit bakers from your office (and from the rest of the building) and post invitations throughout the building, in the elevators, and in the reception areas of your co-tenants.

A-Thons - Plan any a-thon: a danceathon, bikeathon, walkathon, readathon, bowlathon, etc. Choose an a-thon of your choice, recruit participants and collect pledges.

Sports Tournaments - There are many types of tournaments that can raise money. Golf, softball, hockey, soccer. Golf tournaments are especially popular and are a good draw for folks who just want to get out of the office. Most golf clubs offer special rates for charity golf tournaments.

Additional ideas for third-party fundraising events:

Recipe books	House parties	Motorcycle Ride
Pancake breakfast	Car washes	Arts and crafts sale
Silent auctions	Costume parties	Carnivals/fairs
Wine tastings	Used book sales	Holiday celebration
Concerts	Garage sale	Pie/cookie dough sales
Poker Runs	Loonie/toonie drive	Flower bulb sales

Guiding Principles for Third-Party Event Applications

Carefor requests that all individuals and organizations who wish to host an event to benefit Carefor complete a Third-Party Event Application Form and wait for approval from Carefor before proceeding with the event. In preparing your application, please keep in mind the following:

- 1 We would appreciate if applications were submitted a minimum of six (6) weeks before the anticipated event date.
- 2 Carefor will contact the applicant to discuss the proposal one week after receiving it.
- 3 Carefor requests that all proceeds and a final income/expense report be submitted to Carefor's main office within 30 days of the event. This accounting should include name, address, phone/email (if available) as well as date and amount of gift for each contribution to Carefor. This information is essential to ensure that donors receive appropriate recognition and tax receipts (Carefor will provide tax receipts for all donations of \$20 or more).

Any donor who wishes to remain anonymous – that is, who does not wish to have his/her identity disclosed except for tax purposes – may do so by indicating this on a note with the contribution.

- 4 Organizers should notify Carefor in advance of any plans to solicit corporate or business sponsors for the event, to avoid duplication with primary fundraising efforts.
- 5 Third-party event organizers may not set up a bank account which includes the word "Carefor" in conjunction with a fundraising event.

- 6 Third-party events which require any type of license should first be discussed with and approved by Carefor staff. It is important to note that Carefor will not apply for, nor be responsible for, any licenses or permits that are required in conjunction with your proposed event.
- 7 Third-party fundraising activities should be consistent with the mission, vision and values of Carefor Health & Community Services (see page 2). Please consult with Carefor staff if clarification of the mission, vision and values is required.
- 8 Third-party events should not conflict with existing Carefor fundraising events.
- 9 Organizers should be aware that Carefor will not insure any third-party fundraising events.
- 10 Staffing of all third-party events are the responsibility of the organizers.



Available Support for Third-Party Events

In specific instances where deemed appropriate and availability allows, Carefor may be able to provide speakers and volunteers for your fundraising event.

We can also offer these additional supports:

- 1 Permission to use the Carefor Health & Community Services name and logo for promotion of approved third-party events.
- 2 Promotion of event in Carefor publications as space and time permit.
- 3 Carefor promotional materials (brochures, fact sheets, videos, photographs, etc).
- 4 Carefor contribution envelopes, sample event budget sheets and pledge sheets
- 5 Guidance and suggestions for event planning management.
- 6 Speaker(s) to explain Carefor's mission and services.

Tips and Suggestions

This fundraising guidebook is intended to provide the tools and information needed to help you organize events and fundraising initiatives on behalf of Carefor Health & Community Services.

The following tips will identify some tried, tested and true methods that we would like to share with you before you embark on your third-party fundraising event:

Planning Your Event

The Planning Committee

If you or your organization is planning an event, one of your first steps should be to form a committee. Planning a function as a group is easier because you get to share ideas and share the workload too! Holding a function can be time-consuming and stressful if you are organizing it alone, but as a group you might get to meet some really interesting people and actually have a lot of fun.

If you do put a committee together then your first job should be to give every member a certain role or task so that the division of responsibility is made clear at the outset and no work is unnecessarily duplicated. It will also help keep the lines of communication clear and help everyone work together. Schedule all the tasks that are to be performed so that everyone knows what jobs they are doing and the timelines in which they need to complete those jobs.

The budget

Using the budget guidelines in the Third-Party Application Form, plan your anticipated revenue and expenses. This will accomplish two things – first, it will help you identify opportunities where you can save money. Second, a budget will help you keep track of expenses and keep you on track throughout the event. Consider ways to save on your expenses by asking people to donate items in-kind, by asking your suppliers to donate prizes for raffles and auctions and by asking your company's printers to help out with signage and T-shirts.

Who will you target?

Knowing who will attend and support your event is vital to its success. Make sure you think about who your audience is when choosing a venue, soliciting sponsorships, designing promotional materials, promoting your event as well as what prizes they will most likely bid on in a silent auction.

When selling a product or marketing a service, it is important to know your audience as well as possible if you are going to get the maximum amount of interest, and the same is true when planning a charitable event. Those who work for the local press or a local news station are usually invited to report on the event, which gains attention to the charity, raising its profile at the same time.

Pick the right time

Think about how much lead time you will need to plan your event. If you are hosting something simple like a bake sale then you won't need as much time as something larger, like a golf tournament. In addition you will need to think about other annual events so that you aren't holding your event at a time when people are likely to be occupied with something else, like a holiday or religious event. Competing with another function will only divert attention from your event and reduce your fundraising capabilities.

Location, location, location

The place you choose for your function should be easy to get to with public transportation. Many people will get there by car and so ample room for parking is important. Complimentary parking is an added incentive. The location should have the facilities you need, such as toilets, changing rooms and/or kitchens, if necessary. The weather may be an issue on the day of your event so be sure to consider a back-up plan in case of inclement weather.

Encouraging sponsorship

It is common for local businesses or certain influential individuals to be invited to help fund a charitable event in return for promotional advertising. Charitable golf tournaments, for example, may have the participants wearing donated shirts that advertise all the sponsors of the event. Of course, it is not just shirts that are donated. Services, goods, and products can all be donated to charitable events to save on costs. There are many different ways that a company or individual can sponsor or fund an event, and equally there are many ways you can offer promotion.

When searching for companies that would prove a good fit to sponsor your event, think about what services you actually need and look for businesses that provide them. Think about what promotion you could offer and what would be of interest to them to get them on board. The usual candidates are banks, insurance companies, lawyers, real estate agents or local businesses that are used by your organization, family and friends.

Volunteers

Give your volunteers all the help and support, as well as training, that they need to do their job. Tell them about the venue and what facilities it comes with so they know where to go and what to do. Tell them about your charity and all of the positive activities it is involved in so that they understand your cause as fully as possible. This will keep them motivated on the day of your event.

Wrapping up the event

Issue cards of thanks to all of those who helped you achieve your goal. This will be warmly received and will encourage people to help you again in the future, or encourage others to support you next time. It is at this point that you can announce how much money you raised. This is also a great opportunity to announce the next planned event so people have something to work towards.

If you had the help of a planning committee, be sure to arrange a final meeting with them to analyze what went well and what could be done better next time. Give positive feedback and present any feedback from your guests that you managed to get on the day. There are always things that can be improved so keep this in mind even if everything went according to plan. Thanking people keeps them motivated, and charity work can often be very time-consuming and challenging for people. A small token of appreciation to your committee members would be a nice touch.

All of these pointers will help you reach your goal and will give you a good starting point. Much of this may seem like common sense, but it is all too easy to forget things or miss small details along the way.



Good luck, and remember that the team at Carefor Health & Community Services is always on hand to help or give advice where necessary!

For more information, please contact us. We would be delighted to hear from you.

Ottawa

Carefor Health & Community Services
760 Belfast Road
Ottawa, Ontario
K1G 6M8
info@carefor.ca
613-749-7557

Pembroke – Renfrew County

Carefor Health & Community Services
425 Cecelia Street,
Pembroke, Ontario
K8A 1S7
infopembroke@carefor.ca
613-732-9993

Eastern Counties

Carefor Health & Community Services
205 Amelia Street
Cornwall, Ontario
K6H 3P3
infoeasterncounties@carefor.ca
613-932-3451

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