

First things first . . .



Thank you! Thank you! Thank you!

**We really appreciate your support
and we hope you have a very successful event!**

The South Okanagan Women in Need Society (SOWINS) encourages special fundraising events and campaigns carried out to benefit the work of SOWINS – this is what we call a “third party event/campaign.”

We want to help you in any way we can. We also need to make sure that your event matches our philosophy. We must also exercise care to ensure that your event falls within our organizational and legal guidelines. This guidebook was created to support you with your project as well as to help you understand our needs around third-party events.

IMPORTANT – To conduct a fundraising event to benefit SOWINS, we ask that a “Third Party Agreement” (**Appendix I**) be completed and submitted to us for acceptance **before any work on the event or campaign begins**. This allows us to be aware of your plans, and to know how best we can assist you.

Now, let’s get started . . .

What might you need?

Ideas

You probably already have a great idea for a third-party event or campaign, and want to get started! We are grateful for your support and enthusiasm. If you do require some help with your event concept, please let us know and we would be happy to brainstorm some ideas with you. (ie - Appropriate: fashion show. Inappropriate: bikini contest.) It is important to us that all projects associated with SOWINS be consistent with our philosophy, objectives and public image. If you are unsure if your event is appropriate, please contact us right away. This is also one of the reasons why completion of the Third-Party Event Agreement (**Appendix I**) is so important.

Information about SOWINS

Information about SOWINS can be easily found online at www.sowins.com, or you can contact us directly at fundraising@sowins.com or 250-493-4366 ext 110) if you can't find what you are looking for on our website.

If you wish to have our brochures or banner at your event, please let us know so we can arrange a time for you to pick them up. We rely on our banner. To ensure its safety, we ask that a **credit card imprint** be left with us if staff is not accompanying the banner.

This will be destroyed once the banner is returned in the same condition as when you received it. If it is not returned in the same condition, **\$75 will be charged to your credit card.**

Sponsorships, and “In-Kind” Donations

We are pleased to say that over the years we have received generous donations of goods and services from the community. As I am sure you can imagine, we need to take great care to foster our relationships with our supporters, including yourself. In special cases, we can provide you with a third-party request letter for donated goods or services from other organizations and/or businesses for your event. Let's talk about it. This letter states that we are aware that you are raising funds and/or awareness in support of SOWINS.

Please check with us before you approach others in our name to ensure that business supports are not being over asked.

Publicity

You have worked hard, so try to get some publicity! If your event is benefiting a charity (which it is), you are able to promote it for free in the local media. There are a variety of avenues that you can follow:

- **Newspaper & TV community calendars** – Community calendars require a sentence or two about the event. Make sure the important information is included (event name, date, time, location, charity and contact). The deadline for the newspapers is usually around a week before the print date. You can phone them directly to find out. The deadline for television is three weeks prior to the event date. Make sure you provide your contact information so they know how to reach you if they have questions.
- **Online community calendars** – Some of the television stations have online calendars, and anyone is welcome to post event information on their website.
- **Radio mentions** – Many of the local radio stations will try to air community announcements that benefit a charity. E-mail or fax a short description of your event, or a public service announcement three weeks ahead of time and it may get picked up.
- **Press releases** – If you are doing something really unique or creative, you could get a story in the paper. Write a press release about your event, and e-mail or fax it to the appropriate media and/or reporter approximately a week before the event.

When working with the media, it is important to respect their deadlines. We have compiled a list of many of the Penticton and area media contacts (**Appendix IV**).

If you have any questions about promoting your event, please contact Marnie Adams, Development Advisor at (250) 493-4366 ext 110, or e-mail fundraising@sowins.com

What Does SOWINS Need?

SOWINS Representation

If you wish to have a SOWINS representative at your event, please let us know in advance. We are grateful for your support, and we would like to be there to support you. However, in order to ensure that someone can attend, we require **at least three weeks' notice**. Please also let us know the details of our attendance, and your expectations of us (times, date, location, if you require a presentation, if we need to bring anything, etc).

Liability and Responsibility

The individual or group organizing the event/promotional campaign is responsible for all costs associated with the project. SOWINS cannot incur in any costs or liabilities, unless otherwise agreed to in writing prior to the event/promotional campaign.

If acquiring licenses and/or insurance for an event, it is the responsibility of the third party to apply, pay for, and obtain the aforementioned document(s). Examples include: event space rental, liability insurance if required or an event raffle license.

Using the SOWINS Name and Logo

Once the "Third Party Event Agreement" form is completed and approved, we are happy to provide you with the use of our name and our logo. Please let us know if you would like a digital copy of our logo and we will e-mail it to you. Logo usage is limited to the approved third-party event, and **CANNOT BE USED FOR ANY OTHER PURPOSES**.

ALL materials with the SOWINS logo must be approved by SOWINS before use. This includes all print materials, advertising or internet based use. As a registered logo we must ensure compliance of use.

When promoting that you are raising awareness and/or funds for SOWINS, you may want to use one of the following phrases. "Proceeds" = all revenue (net) after expenses. "Partial proceeds" = a portion of revenue after expenses (ie – net revenue was split between two or more charities).

- **“Proceeds from this event will go to** the South Okanagan Women in Need Society (SOWINS).” (You can also use the term “partial proceeds,” or “net proceeds,” if appropriate.)
- **“Your ticket purchase helps us support** the South Okanagan Women in Need Society (SOWINS).”
- **“The [name of your event] will benefit** the South Okanagan Women in Need Society (SOWINS).”

Games of Chance

Any games of chance, such as a raffle or 50/50 draw require a special license from BC Gaming, and require that special guidelines be followed. The event organizers are responsible for any licenses and reporting to BC Gaming.

Charitable Tax Receipts

If you have questions about this topic, the Canada Revenue Agency has a bilingual toll-free telephone service that provides information about registered charities. Please call 1-800-267-2384 (English) or 1- 888-892-5667 (bilingual).

The Canada Revenue Agency has many complex and changing regulations around the distribution of charitable tax receipts. This includes donations of money, “in-kind” items, and services. Issuing an inappropriate charitable tax receipt can put our charitable tax status in jeopardy. To avoid embarrassment for all of us, do not promise charitable receipts.

SOWINS will be responsible for the distribution of charitable receipts **in the appropriate circumstances**. We will need the full name and address for each donor, and if the donation is made directly to SOWINS. Please contact SOWINS at 493-4366 ext 100 to discuss charitable tax receipts.

“Thank You” Letters

It is important to thank everyone who was involved with your event, especially donors and volunteers. We suggest that you send your thank you letters or cards out within one week of your event. If you would like a sample thank you letter, please let us know.

Contact Us

Marnie Adams, Development Advisor at (250) 493-4366 ext 110, or e-mail
fundraising@sowins.com

We really appreciate your support and your hard work!

Review – SOWINS will review the Application & Agreement form using the following criteria:

- Has the Third Party provided sufficient information in the proposal?
- Does the fundraising initiative fit within SOWINS' mission and strategic direction?
- Does the initiative contravene any SOWINS or CRA policy?

Approval – Upon review of your application, a Letter of Agreement will be provided (within two weeks of receiving the application). The Letter of Agreement may be shown to your potential event donors, sponsors, and volunteers.

Event Completion – the Third Party must submit the funds raised within 30 days of your event. SOWINS will strive to provide thank you to Third Party event organizers and post thank you on SOWINS' Social Media and website within 72 hours of the event taking place. SOWINS will submit a thank you announcement and photograph upon receipt of funds to local media (publication at their discretion, SOWINS cannot promise they will publish).

If you have any questions surrounding your event, please contact us at fundraising@sowins.com or (250)493-4366 ext 110.

Thank you again, and good luck!



Third Party Event Application & Agreement Form

(Appendix I)

Application & Agreement

Contact Information:

Today's Date: _

Name of Organization or Individual: _

Contact Person: _

Address: _

Telephone: _

Cell Phone: _

Email: _

Fax: _

Website (if applicable)_

Event Information:

Date of Activity/Event: _

Activity/Event Name: _

Location of Activity/Event:

Type of Activity/Event:

Description of Activity/Event:

Anticipated \$ Donation to SOWINS:

(net \$revenue or % \$raised)



Third Party Event Agreement Form

Agreement

(Appendix I)

Terms and conditions:

1. The previously named event organizers will use the SOWINS name and/or logo only after receiving written permission from a SOWINS representative.
2. Written permission is based in part on an appropriate fit between event organizers, the event, and ethical standards set by SOWINS.
3. In exchange for using SOWINS' name and/or logo, event organizers will designate in writing in advance the amount of revenue from the event/ function they expect to donate to SOWINS.
4. The sponsoring organization agrees to underwrite all costs of the special event/promotional campaign, or to secure such underwriting. SOWINS shall incur no costs or liabilities unless otherwise agreed to in writing prior to the special event/promotional campaign.
5. All sponsorship fees and monetary donations and contributions payable by the Organizer to SOWINS must be paid in total within sixty (60) days from the date of the event.
6. Right to Withdraw: SOWINS may at any time withdraw the right to sue its name for fundraising or other purposes and the right to conduct fundraising and/or a fundraising event if it deems that the quality of the Event is or will be injurious to SOWINS. In the event that SOWINS withdraws, the event in its name and all such activities shall cease and be discontinued.

I have read and agree to abide by the Third Party Event Guidelines. I agree that SOWINS has no financial or legal responsibilities for this event.

Third Party Activity/Event: _

Name of Organizer: _

Signature: _

Date: _

For office use only:

Date received: _

Received by: _

Approved _

Not approved _

SOWINS signature: _

Date: _

“choosing change”



Third Party Event Guidelines

Guidelines

(Appendix II)

1. Third Party event parameters will be reviewed for type of activity, profit potential and SOWINS involvement.
2. Third Party event will generate a positive image for the event and SOWINS.
3. SOWINS must authorize use of its name and/or logo in promotional materials before its use. This includes, but is not limited to, brochures, fliers and advertisements. Third Party event's name may identify the relationship with SOWINS, but not incorporate SOWINS name. i.e. "Memorial Golf Tournament" in support of SOWINS, not "SOWINS' Golf Tournament".
4. All costs associated with the event are the responsibility of the Third Party event organizers.
5. The Third Party event organizers will obtain all necessary permits, licenses, and other approvals required prior to their event. All requirements involving licenses and fees must conform to government regulations.
6. The Third Party event organizers will ensure Liability Insurance and Waivers are in place. SOWINS is in no way responsible for any injury or damage to persons or property associated with the event.
7. All funds, records and requests for charitable donation receipts must be submitted to the SOWINS within 30 days of the event.
8. Where Third Party event organizers designate proceeds to a specific project or fund, SOWINS will ensure that the funds are dispersed as per the organizer's direction.



What SOWINS Can Do To Support Your Event

(Appendix III)

Support

Attention to detail is essential for the success of your event. While we do not have the personnel to assist with the organizational & administrative tasks associated with Third-party events, we are happy to provide guidance for your event.

How can SOWINS support your event? Please check all that apply.

- Provide SOWINS logo (electronic copy) for your promotional materials.
 - Yes No If yes, please indicate the preferred file format: _
- Provide SOWINS promotional materials (i.e. rack card of services)
 - Yes No Quantity _
- Provide SOWINS Newsletter (most recent edition):
 - Yes No Quantity _ or _ Electronic to circulate to your contact list.
- Provide SOWINS Banner for display Yes No
- Provide SOWINS Speaker at your event Yes No Time allotted: _
- Provide SOWINS Representative (s) at your event Yes No
- Would you like your event to be included on SOWINS’s website? Yes No
 Social Media? Yes No
 If yes, please provide: logo in .jpg format, photo if you like, a concise description of the event including important information such as location, date, time, contact name

- Provide tax receipts for donors to be generated by SOWINS? Yes No
- If yes, please explain:

Any additional requests from SOWINS for your event?

(Please note: we will do our best to support your event, but ask for your understanding that our resources are limited and we may not be able to meet all of your requests):



Appendix IV: Community Listing Deadlines

COMMUNITY CALENDAR SUBMISSIONS:

Media Outlet	Distribution
Penticton Western	http://www.pentictonwesternnews.com/calendar/submit/
Castanet	http://www.castanet.net/events/
Global News	http://globalnews.ca/okanagan/events/add/
What's up Okanagan	events@whatsupokanagan.com
Shaw TV Okanagan	go_okanagan@shaw.ca

PUBLIC SERVICE ANNOUNCEMENT SUBMISSIONS (PSA):

Media Outlet	Length of Submission	Distribution
Kristi Paton, Editor (Pent Western)	One page max	kpatton@pentictonwesternnews.com
James Miller, Editor (Penticton Herald)	One page max	editor@pentictonherald.ca
Keith Lacey, Editor (Osoyoos Times)	One page max	editor@osoyoostimes.com
David Wylie, News Director (Castanet)	One page max	david@castanet.net
Howard Alexander Events Coord - Infotel	One page max	events@infotelnews.ca

We encourage you to contact each outlet to ensure this information is still up to date. Please note that this list does not include all of the Penticton and area media outlets.



Feedback Form

Thank you for hosting a Third Party event on behalf of SOWINS. We want to ensure that this initiative was a positive experience for the organizers. We will also use your feedback to assist others with future Third-party event planning.

Third Party Event Name and Date: _____

Comments you would like to share:

Are you planning to host another event for SOWINS in the future?

Yes

No

Maybe