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PHOENIX THIRD PARTY EVENT TOOLKIT

INTRODUCTION

Thank you for choosing the Phoenix as the benefactor for the proceeds of your fundraising event! Phoenix relies on the willingness of many individuals and organizations that generously initiate fundraising events and activities to raise money in support of our programs and services. We deeply appreciate the commitment and investment of time and financial resources required in the successful execution of such initiatives.

To help you in your endeavor, we have designed this toolkit to provide some information and helpful tips you will need when fundraising for Phoenix! It is important that both Phoenix and the event organizer have a clear understanding of the expectations and requirements early in the planning stages. Phoenix will assess the event based on the information provided in the following toolkit and determine how we can help.

THIRD PARTY EVENT

A Third Party activity can be defined as any fundraising initiative brought forward by individuals, community groups, service club, or business external to Phoenix who wish to raise money through a planned activity that is designed, managed and financially resourced by the external participants. All Third Party organizers are asked to read the *Third Party Fundraising Agreement* and sign it to ensure they have understood and accepted the agreement before donating the proceeds of their event.

HOW PHOENIX CAN HELP

To make your job a little easier and to help ensure event success, Phoenix can provide you with the following:

- Phoenix staff member or volunteer to attend the event or cheque presentation
- Upon appropriate approval, a letter of support will be written to validate the authenticity of your event.
- When appropriate, provide a link on the Phoenix website www.phoenixyouth.ca promoting the event, or promote the event on Phoenix's social media pages, including our Facebook and Twitter feeds.
- Phoenix can help you design your very own "Fundraise Now" page on our CanadaHelps.com website. With the ability to donate online, utilization of our new platforms can help make your event more successful than ever before!



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- Providing the event meets the Canada Revenue Agency criteria for charitable receipting, which is discussed in further detail below, issue tax receipts for charitable donations received which are \$10.00 or greater. (Full mailing address must be provided for us to do so)
- Brochures and marketing materials can be provided if requested. (logo, literature, etc.)
- When applicable, Phoenix will provide the sponsor with appropriate recognition in our annual donor report.
- Tax receipts cannot be issued if a gift constitutes of a service or donation of time. However, tax receipts can be issued for gifts of items, otherwise known as Gifts In-Kind. Phoenix will provide you with information regarding tax receipting and is happy to answer any questions you have regarding receipting at your event.

WHAT PHOENIX IS UNABLE TO PROVIDE

There are a number of areas that we are unable to provide support.

- We are unable to provide funding or reimbursement for event expenses.
- We are unable to share our donor mailing list for any reason.

Depending on requests of third-party provider, Phoenix may be unable to provide everything that is requested by third parties. This is due to Phoenix's limited organizational capability. While we will attempt to work with interested parties to the best of our abilities, we will be unable to provide certain services. If you have any questions, do not hesitate to reach out to a Phoenix team member for clarification.

EVENT SUGGESTIONS

When brainstorming or searching for event ideas, Phoenix encourages you to use your own ideas to make your event a success. However, if you're having trouble getting started, here's a list of popular events that could serve as starting points. Events like those below have contributed to Phoenix's success in past years. However, don't be afraid to take your own idea and adapt it. Your creativity and enthusiasm could result in the creation of something great we never even considered and could be used to inspire the next person!

- Auctions (art, silent, services)
- Movie or Trivia nights
- Sports Tournaments
- Benefit Concerts
- School Dances or Events
- Garage/Yard Sales
- Benefit Dinner Parties
- Fashion Shows



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- Bake Sales
- Can/Bottle Drives
- Asking for donations instead of gifts at birthday/anniversary parties
- Lemonade Stand
- Games Tournament
- 50/50 or Raffle*

*The organization/group is responsible for obtaining all appropriate licenses and following guidelines, such as NS Gaming and Lottery Licenses for 50/50 draws or raffles.

Resources such as CanadaHelps.org are also easy ways to set up pledges or fundraising drives if you're interested in putting together a walk/run/swim/skip-a-thon!



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PLANNING YOUR EVENT

Date Submitted: _____

Tell Us About Yourself

Contact Name: _____ Group Name (If
Applicable): _____

Phone: _____ Mobile: _____

Mailing Address: _____

Email
Address: _____

Tell Us About Your Event

Name of your Event: _____

Date of Event: _____ Time of Event: _____

Location of Event: _____

Type of Event: _____

Why did you decide to support Phoenix?

Briefly describe your Event



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Have you ever hosted this type of event before? If so, please describe

How many people are you anticipating will attend this event?

Please describe how you intend to promote the event and whether you will require promotional material from Phoenix? Note that formal approval must be received from Phoenix in order to utilize the Phoenix logo in any and all promotional materials.

How much are you hoping to fundraise in total with this event?

Will other charitable organizations benefit from this event? If so, please specify what percentage or dollar value Phoenix will be receiving. If no other organizations will be participating but Phoenix will only be receiving a portion of net proceeds, please state that below.

How and/or Where do you wish to have Phoenix's Involvement? Please state all requirements below, up to and including staff members, marketing materials, use of logo or any other requests.



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PHOENIX THIRD PARTY FUNDRAISING GUIDELINES AND AGREEMENT

Phoenix may terminate this agreement at any time if (i) the organizer makes any changes to the event without approval from Phoenix; (ii) the organizer does anything that would harm the reputation of Phoenix or; (iii) the organizer otherwise violates the terms and conditions. If Phoenix terminates this agreement, the organizer will immediately cease using the name of Phoenix and use its best efforts to retrieve all materials with Phoenix’s name related to the event. The organizer will continue to be responsible to remit to Phoenix all funds that have been given to the organization as donations to Phoenix. Phoenix reserves the right to deny any application for fundraising events that do not complement the mission of, or project a positive image of, Phoenix and its programs or services (ie. Tobacco and alcohol sponsorship). Phoenix shall not incur any expenses nor be expected to provide any funds for a third party event, such events must be self-sustaining. Phoenix will not be responsible for any financial loss and maintains the right to withdraw support of an event at any time if it does not meet approved guidelines. Formal requests for staff members must be given in advance and noted in the above application. The organization/group responsible for planning the event is responsible for obtaining all appropriate licenses or certification for the event itself.

I have read, understood and agree to abide by the preceding guidelines for special events in support of Phoenix.

Name: _____

Position: _____

Signature: _____

Date: _____

GETTING YOU STARTED

This list is meant to serve as a series of helpful tips that will guide your process while planning, executing and wrapping up your event. This guide is not meant to be specific to a single type of event, but rather serve as general guidelines to any interested party. We also understand that not everything on this list will apply to your event, but we hope to provide help where it may be needed.

Phoenix hopes to support you throughout your event so that it will be a resounding success and can foster a lasting partnership. If you have any questions or concerns, please do not hesitate to contact Phoenix, as we will be happy to lend support throughout the period of your event. We also encourage you to have fun! You're doing a great thing for our cause, so be sure to enjoy yourself too. We thank you for allowing us to help youth rise above.

Step 1: Design

Logistics

- What kind of event will you be planning? Feel free to consult our event ideas pages to help get you started!
- Have you ever hosted this type of event before? If not, have you consulted parties who have?
- Which factors, such as weather, location, time, expenses, space, materials and people, will greatly impact the design of this event?
- How will we determine if we are on track with timelines or internal deadlines? Have you created a budget for your event?

Location

- Where will the event be held?
- Do you need to reserve the space beforehand?
- If it's held in a public space, do you have the necessary permits?
- If it's held in a business space, how will they benefit from your presence?

Environment

- Have you considered all factors, ranging from the possibility of inclement weather to transportation needs?
- Have you acquired all the necessary permits or licenses needed?
- If you feel like you need help, have you consulted with an expert or professional who could lend their expertise?

Step 2: People

Volunteers

- Do you need volunteers at your event? If so, who will you recruit?
- How many volunteers will be needed?
- Where will each person need to be at what time?
- What will be required of your volunteers?
- Is there anything each person will need to bring or supply?
- Will you provide volunteers with all the information and resources needed to be effective?
- Have you assigned an individual to be responsible for handling all donations?

Collaborators/Potential Donors

- Is there anything you need that must be donated or given as a gift?
- Does that include all gifts and services that will be needed at your event?
- Have you created contingency plans in case the first plan runs into issues?

Step 3: Materials

Resources/Expenses: Phoenix is unable to provide financial assistance of any kind to third party events. We urge you to consider what will be needed in total.

- Do you need to purchase any goods or services?
- Have you looked into having them donated?
- Have you looked into community services that are offered?
- Where can needed goods or services be found or sourced?

Step 4: Fundraising

Donations

- How do you intend to fundraise for Phoenix during your event?
- How will you record donations?

- How will you record donor's names and contact information so that Phoenix may issue charitable tax receipts?
- How will you donate all proceeds to Phoenix once the event is completed?
- If you're collecting pledge forms, who will collect them and how will you ensure they are properly filled out and all are collected?

Step 5: Outreach

Communication

- How will you communicate updates and information to interested parties?
- How will you ensure effective lines of communication with all parties involved?
- How will you communicate with donors and attendees after the event to thank them for their support?
- How will you communicate with Phoenix throughout to ensure Phoenix is kept up-to-date on your process?
- When will you complete the feedback form to let us know how your event went?

Marketing

- How do you intend to market or advertise your event?
- What advertising or marketing methods will you be using? Will you be handing out fliers or setting up social media accounts specifically for your event?
- What sorts of media specifically do you intend to use to promote your event?
- How do you intend to use the promotional materials that Phoenix can provide you?
- How will word of your event be communicated to the community at large? Will it be directly from you or will it originate from a third party?



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EVENT WRAP-UP

Congratulations on a successful event! Phoenix wishes to express its deepest gratitude and thank you for your time, effort and generosity. Because of you, Phoenix is able to continue to serve the community and help youth rise above. The form below is an event wrap-up sheet. We're hoping you can provide us with feedback about how your event was, whether you attained some of your goals and hopefully give some thoughts about your partnership with Phoenix.

Tell Us How Your Event Went

What was Your Fundraising Goal? _____

How Much Did Your Raise? _____

How Many People Attended Your Event? _____

How Did You Promote Your Event?

Invitations to friends and family Internet Facebook/Twitter/Social Media
 Posters Radio/TV Word of Mouth Other: _____

Were attendees satisfied with your event? Were you satisfied with your event?

What Would You Consider To Be The Strengths Of Your Event?



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What Challenges Did You Face In The Design And Execution Of This Event?

What Advice Do You Have For Future Events or Fundraisers?

Can You Provide Feedback On Your Partnership With Phoenix For This Event?

Do You Plan On Doing This Event Again?

Did you find Phoenix's Third Party Event Toolkit Helpful? **Yes** **No**

What Recommendations Would You Make to Improve Phoenix's Third Party Event Toolkit?



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Thank You for Your Feedback.

Please send the completed form via email to: bbeckett@phoenixyouth.ca

OR

Send this form via hard copy to:

Phoenix Youth Programs

ATTN: Fund Development Office

6035 Coburg Road

Halifax, Nova Scotia

B3H 4R7