



# Third Party Event Handbook

**Alexandra Marine & General Hospital Foundation**

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Over the years, many groups and individuals have organized events that have supported the work and mandate of the Alexandra Marine & General Hospital Foundation. The Foundation is grateful for the community's support and generosity. In addition to the funds that are generated by third party initiatives, the events provide increased public awareness of the Foundation.

What is a third party event? A third party event is any fundraising/promotional activity that is not affiliated with the Foundation. The Foundation is not active in planning or organizing the event. The Foundation does not incur any costs or liabilities for the event.

The Foundation receives many inquiries from groups, businesses and individuals wishing to organize fundraising events in support of the Foundation's projects. The events are as diverse as the imagination. Events hosted to benefit the Foundation have included sporting events, dress-down days, auctions, dances and bake sales.

The *Third Party Event Handbook* has been designed to assist organizers in creating and staging a successful third party event. The *Third Party Handbook* includes the Foundation's Third Party Event Policies, a Third Party Event Proposal Form and a list of event planning tips. A Third Party Event Proposal Form must be submitted to the Foundation prior to organizing the event. The Foundation considers each request individually.

The Foundation evaluates and approves third party events based on the following criteria:

- Consistency with the Foundation's Mission, Vision and Values.
- Public relations value of the event.
- Potential for conflict with existing Foundation events or promotions.

Generally, the Foundation offers the organizer(s) with assistance by:

- Offering the use of the Foundation name and or logo (with permission).
- Providing Foundation education and promotional materials (brochures, fact sheets etc.)
- Promoting the event throughout the Hospital and to the community as deemed appropriate.
- Providing a letter of support to be used to validate the authenticity of the event and the organizers as deemed appropriate.
- Providing suggestions for event planning/management.

The Foundation cannot offer assistance by:

- Offering reimbursement for expenses.
- Sharing mailing lists of Foundation donors/volunteers/stakeholders.
- Guaranteeing staff or volunteer attendance at the event.



### **Third Party Event Policies**

To ensure that third party events have a positive impact on the Alexandra Marine & General Hospital Foundation's (Foundation) public image, the following requirements must be met by those groups or individuals wishing to conduct an event that benefits the Foundation.

1. Organizer(s) wishing to hold a fundraising/promotional event to benefit the Foundation are required to complete the Third Party Event Proposal Form attached, prior to organizing the event.
2. The Foundation will not incur any **costs** or **liabilities** associated with third party events. The organizer(s) must obtain all necessary permits, licences, and insurance relating to the event. The Foundation may ask for copies of the above in advance of the event.
3. All staff and volunteers for the third party event will be provided by the organizer(s), and must;
  - adhere to the provisions of the Foundation's ***Ethical Fundraising and Financial Accountability Policy, ( see attached )***
  - act with fairness, integrity, and in accordance with all applicable laws,
  - adhere to the provisions of applicable professional codes of ethical standards of practice to inform, serve, guide and otherwise assist donors who wish to support the activities funded through the Foundation, but not pressure or unduly persuade,
  - disclose immediately to the foundation office any actual or apparent (perceived) conflict of interest, and
4. Event organizer(s) are asked to identify the businesses or individuals that will be contacted for solicitation so as to avoid overlap with the Foundation's current campaigns. Permission is required prior to soliciting any business or individual in the Foundation's name.
5. In accordance with government, Hospital and Foundation privacy policies, the Foundation does not release its donor/ mailing list for any purpose.
6. Where appropriate, the Foundation will not solicit participation from its donors, volunteers, stakeholders beyond notifying them of event details. The Foundation is not bound to support and/or promote a business/group as the result of the group having hosted an event to benefit the Foundation.
7. Recognition for the organizing group/individual's donation to the Foundation will be in accordance with the Foundation's Donor Recognition Policy.
8. The Foundation will not partner nor support third party events that discriminate against any person or group based on gender, race, class, economic status, ethnicity, sexual orientation, age disability and cultural/religious backgrounds.

9. The organizer(s) acknowledge that the Foundation adheres to the receipting policies set out by the Canada Revenue Agency and will issue all tax receipts related to the event if applicable. The organizer(s) cannot claim to issue charitable tax receipts for any donation or item on behalf of the Foundation Office, in support the event.
10. Organizer(s) are prohibited from setting up a bank account which includes the words or acronyms AMGHF, AM&GHF, or Alexandra Marine & General Hospital Foundation in conjunction with any fundraising event.
11. All advertisements and other event-related promotional materials which use the Foundation name and or logo(s) must be approved by the foundation office prior to use.



### **Third Party Event Proposal Form**

To register your third party event to benefit the Alexandra Marine & General Hospital Foundation, please complete this form and submit to the foundation office. Applications must be approved prior to advertising or holding the event.

<hr/> Group/Individual Planning Event		<hr/> Name of Person Responsible for the Event
<hr/> Mailing Address		<hr/> Town/City
<hr/> Province	<hr/> Postal Code	<hr/> Email Address
<hr/> ( )	<hr/> ( )	<hr/> ( )
<hr/> Home Phone	<hr/> Business Phone	<hr/> Cell Phone

Please select a category that best describes your group/organization:

☐ Business      ☐ School      ☐ Community      ☐ Service Club      ☐ Other \_\_\_\_\_

**About the Event**      ☐ Open to the public      ☐ By invitation only

<hr/> Name of Event	<hr/> Date of Event
<hr/> Location of Event	<hr/> Time of Event
<hr/> Target Market (i.e. group members, general public, family)	<hr/>

Is this event   ☐ One Time   ☐ Annual   ☐ Ongoing   Has this event taken place before?   ☐ Yes   ☐ No   If so, when? \_\_\_\_\_

Will any other group or organization receive proceeds from the event?   ☐ Yes      ☐ No

If yes, who and how are the proceeds to be divided?

Do you have a Promotions Plan that includes the Foundations name and or logo? If so, please outline. *(This includes the use of social media, newspapers, radio, posters, flyers etc. Please attach any samples to the application).*

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What is your Cancellation Plan? \_\_\_\_\_

Source(s) of revenue:      ☐ Ticket Sales      ☐ Raffle      ☐ Live/Silent Auction      ☐ Cash Donation  
                                 ☐ Sponsorship      ☐ Pledges      ☐ Merchandise Sales      ☐ Other: \_\_\_\_\_

### **Event Agreement**

*By naming the Alexandra Marine & General Hospital Foundation as the beneficiary of a third party event, I/we are required to donate the full amount (or partial amount as approved by the foundation office) raised on the Foundation's behalf. I/we agree that the Alexandra Marine & General Hospital Foundation are not responsible for any expenses related to the event. By signing below, I/we agree that the Alexandra Marine & General Hospital Foundation will receive the proceeds from the event within 30 days following the event.*

*By signing below, I/we have read, understood and agree to adhere to the Alexandra Marine & General Hospital Foundation's Third Party Event Policies.*

**Signature of Applicant(s):** \_\_\_\_\_ **Date:** \_\_\_\_\_

***Please return this form and attachments by:***

***Mail:*** Alexandra Marine & General Hospital Foundation, 120 Napier Street, Goderich ON N7A 1W5

***E-mail:*** amgh.foundation@amgh.ca

*For questions concerning the Foundation's Third Party Event Policies or Event Proposal Form, please contact the Foundation Office at 519.524.8508*

***Thank You for Supporting Quality Health Care Close to Home.***

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**For foundation office Use:**

**Date Application Received:** \_\_\_\_\_ **Date Acknowledgement Sent:** \_\_\_\_\_

**Approved/Declined By:** \_\_\_\_\_ **Date Approved/Declined:** \_\_\_\_\_

### **Tips for Organizing a Successful Third-Party Event**

1. Start brainstorming and planning for the event well in advance of the anticipated date. Be creative and have fun.
2. Decide on the type of event. Evaluate the event based on criteria such as the complexity of hosting the event, number of people required to organize the event, target market, community appeal etc.
3. Discuss the third party event idea with the Foundation Office.
4. Anticipate possible problems and address them early in the planning. Design an alternative plan in case of unforeseen circumstance.
5. Prepare a realistic budget. Decide on the admission fee etc. Review the budget frequently.
6. Decide the date, time and location. Consider other events etc. that might be taking place during the same time period.
7. Create a detailed timeline and review it frequently.
8. Check into insurance requirements and arrange to get licenses and permits well ahead of the event.
9. If 'key' individuals are to participate in the event (speakers, performers, caterers etc.), research and confirm their availability for the dates that have been chosen. Obtain written contracts.
10. Make a list of tangible items (tables, linens, sports equipment) that will be needed for the event. Decide where they will be bought/rented/borrowed from and who will arrange to buy/pick-up/return them.
11. Create a public relations plan for advertising the event. Enlist the help of creative people who can assist with designing brochure/poster and other P/R material. The sooner the event is advertised, the better the chance for success.
12. Get the local media involved in helping to promote the event.
13. Confirm with 'key' individuals, venue etc. by phone a week to ten days prior to the event.
14. Make sure 'day-of' event volunteers know what they are suppose to do. Delegate.
15. Keep good notes of what has been accomplished and what still needs to be done.
16. Ensure that there is enough petty cash to accommodate the needs of the event.
17. Enjoy the event and applaud and thank everyone for a job well done.

Adopted by the AMGH Foundation Board of Directors: February 3, 2010  
Reviewed and Approved by the AMGH Foundation Board of Directors: October 9, 2024