



wellspring  
Calgary

A Lifeline to Cancer Support

**Fundraising Guidelines for  
Community Led Events**



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## EVENT PROPOSAL FORM

(To be filled out online or printed and emailed or faxed)

### Please fill out to the best of your knowledge

Volunteer Event Organizer Name: \_\_\_\_\_

Company or Group Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone Home: \_\_\_\_\_ Business: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Tell us about your Company or Group: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### EVENT DETAILS

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_ Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Venue Name: \_\_\_\_\_

Venue Location: \_\_\_\_\_

Expected Number of Participants: \_\_\_\_\_

Who are the participants: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Brief Event Description: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***This event is a (please circle one):*** private event public event

***This event is a (please circle one):*** annual on-going one-time

***This event is a (please circle one):*** first time



**MARKETING DETAILS**

How will you market and advertise this event? Please explain: \_\_\_\_\_

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**Will there be media at the event (circle):**      yes      no

**FINANCIAL DETAILS**

<b>Estimated Gross Revenue</b>	
<b>LESS: Your Event Expenses</b>	
<b>Net Proceeds to Wellspring Calgary (Estimated Donation)</b>	

**Types of Fundraising at the Event (Optional):**

<b>Event Revenue</b>	<b>Unit Charge</b>	<b>Est. Gross Revenue</b>
Tickets / Registration		\$
Sponsorships		\$
Raffles		\$
Auctions		\$
Vendor Booths		\$
Other:		\$
Other:		\$

**List Sponsors confirmed and/or unconfirmed (optional):**

<b>SPONSOR NAME</b>	<b>CONTACT NAME</b>	<b>CONFIRMED/ NOT</b>	<b>AMOUNT</b>



**OTHER DETAILS**

***Will you require Wellspring materials?***

Program Brochure # \_\_\_\_\_ Wellspring Information # \_\_\_\_\_ Standing Banner # \_\_\_\_\_

***Will you require anything further from Wellspring Calgary (eg. Speaker, video, volunteers)?***

***(Please note, not all requests will be fulfilled.) Please explain /list / identify:***

\_\_\_\_\_

How did you hear about Wellspring Calgary? \_\_\_\_\_

\_\_\_\_\_

**By signing below you agree that Wellspring Calgary must approve this proposal and use of its name and/or logo prior to publicizing or holding the event. Wellspring does not sell or trade its lists.**

Event Organizer Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Event Organizer Email: \_\_\_\_\_ Alt Phone: \_\_\_\_\_

Event Organizer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please mail or fax this form to:

**Karen O’How  
Events Manager  
Wellspring Calgary**

**kareno@wellspringcalgary.ca  
Ph: 403-990-5790  
Alt: 587-747-0260 ext 1005**



## How Wellspring Calgary Can Help

### **AVAILABLE WELLSPRING CALGARY RESOURCES**

**Staff:** Our staff members are happy to assist you with questions or concerns from the inception, through to execution and post analysis of your event. A Wellspring Calgary staff person may be able to attend your event, share the Wellspring Calgary experience and assist with collecting donations.

**Volunteers:** Wellspring Calgary has some event-trained volunteers just for third party (community hosted) events. Volunteers may be available to attend your event and provide assistance but this is not guaranteed.

**Letter of Support:** We can provide a letter of support for your potential sponsors identifying you as a Wellspring Calgary fundraising event organizer.

**Promotional Materials:** If you would like to include Wellspring Calgary's materials (i.e. banner, brochures, program guides, and audiovisual materials) at your event, please let us know at least one week in advance of the event day.

**Wellspring Calgary Website:** We may be able to promote your event on the Wellspring Calgary website ([www.wellspringcalgary.ca](http://www.wellspringcalgary.ca)). Depending on event timing, we will do our best to let our members and supporters know about your event through our email communications. (Please see attached On-line Fundraising and New Media document.)

Please also inform us before promoting your event on any social networking site e.g. Facebook, Twitter, MySpace.

**Media:** We are happy to work with you on creating a news release about your event to media in your community. The third party fundraiser, however, is responsible for issuing the news release and handling media relations around the event itself. We may be able to provide a spokesperson or media quotes with adequate notice.



## **LOGO USAGE**

**Please see attached Graphic Standards for reference. We kindly request that you submit all materials featuring our name and logo to our office for approval prior to printing or posting. We request at least one week for the approval process.**

## **SPONSORS**

We kindly request that a list of all potential sponsors be forwarded to Wellspring Calgary for review prior to being approached. This will ensure consideration for our current corporate partners and donors, any ongoing support Wellspring Calgary receives from the community and potential conflicts of interest, as well as addressing any potential reputational risk. We request at least one week for the review process.

## **FINANCIAL GUIDELINES**

The organizer shall be responsible for all costs and expenses of the Event and any other related activities, unless Wellspring Calgary provides express written agreement in advance to pay for specific costs. We would appreciate receiving all funds raised within thirty (30) working days of the conclusion of the event. Please send a cheque **payable to Wellspring Calgary**, at 1404 Home Road NW, Calgary, Alberta, T3B 1G7. Please include a cover letter from the main contact person.

## **TAX RECEIPT**

Tax receipts can only be issued to individuals donating directly to Wellspring Calgary, in amounts of \$20 or greater unless specifically requested otherwise. Third party organizers are responsible for the collection of names and valid mailing addresses of those that donate directly to Wellspring Calgary by cash or cheque and wish to receive a tax receipt. At conclusion of the event, please send a letter to Wellspring Calgary, Fund Development, with the list of names, mailing addresses, phone numbers and amount to be receipted.

Wellspring Calgary may be able to create an online giving page for your event to collect credit card donations before and during your event. Please contact our Fund Development department to coordinate this added service, in advance of your event.

## **INDEMNITIES AND LIABILITY**

The organizer and other related parties (including donors and sponsors) agree to indemnify and hold harmless Wellspring Calgary and its directors, employees, and volunteers from any and all claims and liabilities in any way related to the event.

Wellspring Calgary may require that your attendees / participants complete a waiver for release from liability.



### **INSURANCE**

All responsible parties (including event vendors) may be asked to provide evidence of liability/property insurance applicable to the activities of the event. Wellspring Calgary reserves the right to require to be listed as additional insured.

### ***Tips:***

### **THANK YOUR SUPPORTERS**

Express your gratitude to all parties who helped make your event a success, including the volunteer committee, participants, sponsors, and in-kind supporters. It goes a long way to making all involved feel appreciated, and helps to build support for future events. We can provide Wellspring Calgary logo thank you cards (blank inside) upon request.

### **PICTURES**

If you have a photographer taking pictures of your event, please share them with us. We would love to post some on our website to acknowledge your event.

### **CELEBRATE**

Celebrate the completion and the success of your event! We couldn't do the work we do without your support, so be sure to thank yourself too! And know how deep our gratitude runs that you are undertaking this event to benefit our mission and the people we serve.

***Together we are improving the quality of life of those living with cancer and their loved ones, and ensuring that no one has to face cancer alone. Thank you!***





## Use of Wellspring Logo and Style Guide

### **LOGOS**

***Any and all changes to the Wellspring Calgary logo must be made through the Wellspring Network. At no time is it appropriate to recreate or adapt the official Wellspring Calgary logo as presented in this guide.***

### **COLOUR OPTIONS**

The Wellspring Logo should always appear in the Wellspring green (Pantone 362 PC or CMYK equivalent). If green is inappropriate where the logo is being placed on background colours or graphics, black or white may also be used. The Wellspring logo should never appear in any colour other than Wellspring green, black or white.

#### ***Wellspring logo with centre identifier:***

The Wellspring logo with centre identifier can be appeared in one-colour (Pantone 362 PC) or two-colour (Pantone 362 PC and Pantone 2665 C). If both colours are inappropriate where the logo is being placed on background colours or graphics, black or white may also be used. The Wellspring logo should never appear in any colour other than Wellspring green, black or white, as well as two-colour version.

### **TAGLINE AND TAGLINE USE**

The official Wellspring tagline is “A Lifeline to Cancer Support”. At no time should this tagline be altered. This is the only tagline that should be used in conjunction with the Wellspring logo. Wherever space and size allows, the logo should be used with the tagline.

Font – Calibri or

Preferred font size when used on its own – 10 pt

### **DIMENSIONS**

All elements in the Wellspring logo should always be kept in proper proportion to maintain the integrity of the logo.

The vertical version of the Wellspring logo should not appear smaller than 0.75” wide by 0.67” high in any printed material, or 54 pixels wide on screen. The vertical version of the logo with tagline should not appear smaller than 1.25” wide by 1.16” high in any printed material, or 90 pixels wide on screen. The horizontal version of the logo with tagline should not appear smaller than 2” wide by 0.43” high in any printed material, or 144 pixels wide on screen.



Other reproduction methods may require the minimum size to be greater than the sizes identified here. The Wellspring logo should never be stretched or distorted in any way.

The placement of the Wellspring logo and Wellspring logo with centre identifier should always be at least 0.25" from the edge of the page. The logo should never be placed against the edge of the page as a bleed because when the page is trimmed the logo is often cropped disproportionately violating the logo standards.

### **SPECIAL EVENT LOGOS**

These logos must be separate elements from the Wellspring logo. They are not to incorporate the Wellspring logo in any way (though the Wellspring logo may be displayed according to the guidelines above as a separate element next to the special event logo).

## **Receipting Guidelines for Third Party Events**

### **ELIGIBILITY FOR A TAX RECEIPT**

Wellspring Calgary is committed to following the rules and regulations regarding tax receipting as set out by the Canada Revenue Agency (CRA). It is important for you to understand the rules about tax receipts before you plan your event, as these requirements are extensive and can be time consuming.

Wellspring Calgary can only provide tax receipts if:

- You have submitted an event proposal form and have written approval by Wellspring Calgary.
- For a donation to be eligible for a tax receipt, ALL of the following conditions must be met:
  - Donations must be voluntary (freely given)
  - No advantage/benefit (good, service or privilege) to be received by the donor or anyone designated by the donor. The donor cannot expect anything in return for their charitable donation. (For example, a prize or recognition through signage or logo use.)

Sample situations that **do not** qualify for a tax receipt:

- Payment for service (e.g. donated time, labour, etc.)



- Payment for a lottery ticket, raffle, auction item, or chance to win a prize.
- Payment of a basic fee for admission to an event or to a program.
- Gift Certificates do not qualify for a tax receipt. However if someone purchases a gift certificate and donates the purchase, that person is entitled to the tax receipt (but not the vendor)
- Directed payment by the donor to benefit a specific person, family, or other non-qualified donor.
- Donations provided in exchange for advertising, marketing, promotion or sponsorship.

### **CASH, CHEQUE, AND CREDIT CARD DONATIONS**

The following explains how to deal with cash or cheque donations. If money or a "pledge" is given in support of Wellspring Calgary in the form of a cheque or cash or by credit card, you will need to follow these guidelines to ensure that a tax receipt can be issued:

### **CASH AND CHEQUE DONATIONS**

Please supply Wellspring Calgary with a complete and legible list of donors using a Pledge Form or something similar, including:

- First and last name of who is to be receipted (if a corporation, please also supply a primary contact name and relevant information)
- Email address
- Mailing address, including city, province, and postal code
- Amount to be receipted
- Indication if a tax receipt is to be issued for each donation

### **Tax receipts notes:**

- Tax receipts will only be issued if the donation is \$20.00 or greater (unless otherwise requested)
- The tax receipt will be issued to the person who made the donation (that is, the name on the cheque).
- Wellspring Calgary donation forms can also be provided for your event to capture the cash donor's personal information.

### **CREDIT CARD DONATIONS**

Upon request and with advance notice, Wellspring Calgary can create an online giving page for your event. We encourage as many donations as possible go through this page. Donors provide their own information, and are thanked and receipted instantly and automatically by email.



### **CORPORATE CONTRIBUTIONS**

A tax receipt cannot be issued for corporate sponsorships where an advertising or promotion benefit occurs, such as:

- Corporate name on printed material: posters, brochures, banners, tickets, and websites.
- Newspaper, radio and or television coverage
- Logo on printed material (generates brand awareness)

### **GIFTS IN KIND**

For tax receipting purposes, all Gifts in Kind must be pre-approved by Wellspring Calgary (in accordance with CRA guidelines).

**Service:** CRA does not allow charities to issue income tax receipts for services provided or for gift certificates from a vendor.

**Product:** Request an invoice for the sticker value of the donation amount and forward it to Wellspring Calgary. A letter on Company Letterhead identifying the fair market value (sticker price) is also accepted.

**Art and Specialty Gifts:** For gifts whose value is estimated to be over \$1,000 (and whenever else determined to be necessary), Wellspring Calgary is required by CRA to seek assistance from a tax or valuation specialist in assigning fair market value for charitable receipt purposes. Appraisal costs are assumed by the donor or event organizer and not by Wellspring Calgary.

## **On-Line Fundraising & New Media Marketing**

On-line fundraising is becoming increasingly popular with donors of all levels. Wellspring Calgary currently has an online portal that allows donors to make secure donations. There are two options for online giving for your event:

- **Giving Page:** With advance notice and upon request, Wellspring Calgary may be able to create a fundraising page for your event. You can direct donors here and they will be immediately receipted for their credit card donations to Wellspring Calgary. (Please note, sponsorships for your event (which are non-receiptable) and/or money to be directed towards your event expenses cannot be processed through these pages.)



- **Pledge-a-thon Pages:** If your event encourages people to raise money (a bike ride, walk, etc.) we may be able to create a pledge-a-thon webpage for your event (with advance notice and upon request). Your guests will be able to sign up and create their own personal fundraising pages to ask for donations from their families and friends. Donations will be immediately and automatically receipted to the donors.

(Please note, sponsorships, gifts in kind and expense funding cannot be processed through the above methods.)

Wellspring Calgary would be pleased to link to your event on our Facebook page and Tweet about it leading up to our event, as well as list it in the Upcoming Events section of our website.

**Need Help?** *Please feel free to contact us at [events@wellspringcalgary.ca](mailto:events@wellspringcalgary.ca)*