



CASA

Foundation

supporting children's mental health

Third Party Event Package

Table of Contents

<i>Why Choose to Support CASA Foundation?</i>	3
<i>How to Start a Third Party Event</i>	4
Step 1. Choose Your Event Activities	4
Step 2. Create the Budget.....	5
Step 3. Find Sponsorship	6
Step 4. Get Publicity	6
Step 5. Coordinate Volunteers	7
Step 6. Establish a Fund Collection Routine	7
Step 7. Meet Legal & Safety Requirements.....	7
Step 8. Host your Event	8
Step 9. Post Event Cleanup.....	8
<i>Tax Receipts</i>	9
<i>Insurance</i>	9
<i>Staffing and Volunteers</i>	10
<i>Requesting a CASA Foundation Speaker or Representative</i>	10
<i>How can CASA Foundation Help?</i>	10

Why Choose to Support CASA Foundation?

The problem is all too real.

One in five Canadians is affected by a mental health disorder. Seventy percent of mental health disorders begin during childhood and adolescence.

On any given day, up to 200 children and families access CASA's services. Their health conditions are diverse and many include one or a combination of: depression, anxiety, suicidal feelings, self-harm, social withdrawal, fetal alcohol spectrum disorder and addictions, just to name a few. Our families represent the full spectrum of Alberta families: mental illness cuts across all cultures and socioeconomic circumstances.

CASA provides mental health and addiction services designed to meet the specific needs of children and their families affected by mental illness in Edmonton and Northern Alberta. Over 4,000 children and their families need CASA's services each year and the number continues to grow. Our donors' support helps CASA continue treating those who need our services.



Visit www.casaservices.org for more information about CASA's programs.

No one should have to face mental illness alone.

How Can You help?

CASA relies on its amazing group of donors and supporters. If you are interested in joining us in the crusade to raise awareness for the importance of children's mental health and would like to host an event, then look no further. In this package you will find the tools and resources you need to organize events and activities for CASA Foundation.

How to Start a Third Party Event

Please know that we must adhere to Canada Revenue Agency's operating and legal standards. Therefore, read this package carefully and if you have any questions, please contact us.

Step 1. Choose Your Event Activities

There are so many different event types out there and if you haven't decided on which route to go, perhaps we can give some suggestions -- just make sure it's something you and your group will have fun doing and that the time commitment is achievable!

- Live & Silent Auctions
- Raffles*
- 50/50 Draw *
- Concerts
- Fashion Shows
- Dunk Tank
- Car Washes
- Bingo*
- Golf Tournament
- Group Activities (e.g., Paint Night)
- Corporate Fundraiser (e.g., Jeans Week)
- Bicycle Tour
- Run/Walk Tour
- Bottle Drive
- Sports Activity
- Dinner Event
- Garden Parties
- Art Shows
- Pet Walks
- Other



**Important Note: The Alberta Gaming and Liquor Commission regulates bingos, raffles, Monte Carlo/ Casinos, 50/ 50 draws. Please visit www.aglc.ca for more information and contact us if you need one of these licenses.*

Step 2. Create the Budget

This is a table to help you create your event budget. Make sure to set realistic expense amounts and revenues. Also, do not forget to include tax in your budget prices!

Expense	Estimated Cost	Actual Cost
Facility Fee		
Rental Equipment		
Advertising/ Promotion		
Printing		
Postage		
Food/Catering		
Décor		
Transportation		
Security		
Entertainment		
Other: _____		
Other: _____		
Total Expenses:		
Revenue		
Ticket Sales		
Food Sales		
Vendor Sales		
Sponsorship		
Donations		
Other: _____		
Other: _____		
<Minus Total Expenses>:	<	>
Total Revenue:		

Note: All expenses must be paid for by event organizers as the event organizers must agree to underwrite all event costs. The Foundation is unable to reimburse any costs or pay costs directly to the supplier.

Step 3. Find Sponsorship

Getting sponsors can be a great way to reduce the costs of larger events. It is a good idea to approach local business for cash, in kind (donations in the form of goods or services) donations, or discounts on company products.

A list of sponsors who have donated to or sponsored your event must be submitted to the Foundation and include a description of their donation and/or sponsorship including the fair market value. This allows CASA Foundation to ensure that partners in our community are recognized for their support. CASA Foundation will have final approval of all sponsors.

Once you register your event, you can obtain a letter from CASA Foundation stating that your event will support a registered charity.

CASA Foundation will not solicit sponsors on behalf of the Event Organizers, nor will they provide contacts for sponsorships.

Tip: When approaching potential sponsors, try to have a detailed letter explaining exactly what you are asking for, what the event is and how the sponsor will be making an impact. Try to make sure you have an idea of how you can show the sponsor 'what is in it for them'.

Please know that no potential sponsor can be approached without CASA Foundation's permission.

Step 4. Get Publicity

If you want to make your event bigger, publicity can be a lot of help. Some suggestions of things you can do to get the event out there are:

- Contact local media (e.g., Radio stations, news channels)
- Social Media (e.g., Create an event page on Facebook)
- Word of Mouth – Friends, family, coworkers, can be a huge help in spreading the word
- Contact local celebrities or well-known people
- Design print material* (e.g., Posters, flyers, brochures)

*Make sure to refer to Schedule B for our visual identity guidelines.

CASA Foundation must be informed of any and all media that have been contacted. Event organizers must not speak on behalf of the Foundation without approval of the Foundation. Such actions and statements include, but are not limited to, presentations to the community, media requests, and statements to the press, other organizations, or stakeholders.

Step 5. Coordinate Volunteers

Volunteers make the world go round when it comes to charity events. If you are hosting an event that will require volunteers, make sure to give ample time to start building your base. Make sure to plan out all the roles that will be needed so that your volunteers can be scheduled accordingly. When trying to fill the roles, we recommend having a small description with each role so that the volunteer will be aware of their duties at the event.

Tip: Keep in contact with your volunteers to ensure there are no mix-ups on the big event day.

Step 6. Establish a Fund Collection Routine

When collecting money at these events, it is very important to keep organized. Even if your event is small, someone must be responsible for collecting and securing money. When cash is involved, it is always best to have two people present when it is being handled and to have both count it.

Tip: If there are many sources of income (e.g., ticket sales at the entrance, food and drink, auction), then you may want to keep track of it all separately. This may help with your event analysis afterwards.

Do not send cash in the mail (please write a cheque or money order for the value) and ensure all **cheques are made payable to CASA Foundation**. All donors must fill out a donor card listing their name, address, phone number, e-mail address, and amount given (this is for receipt purposes). If donors need to have their purchases processed via credit card, they can write the number on the donor card as well. Donor cards can then be given to CASA Foundation for processing.

All funds raised must be given to CASA Foundation within 30 days after the event.

Step 7. Meet Legal & Safety Requirements

It is critical that CASA Foundation and all those raising money for CASA Foundation are compliant with Canada Revenue Agency's (CRA) regulations. If we do not follow their regulations, CASA Foundation runs the risk of losing its charitable status and its ability to raise money.

When it comes to events, there can be a number of licenses involved, so please make sure you are thinking your event through and applying for the correct ones. Many venues will already have appropriate licenses (e.g. liquor licenses), be sure you ask about these details before booking your event. Some common licenses include:

- Alcohol License: Be sure to apply for this one at least eight (8) weeks in advance.
- Raffle/Bingo/Monte Carlo/ Casino/ 50/50 Draw – The Alberta Liquor and Gaming Commission regulates these and, therefore, they require a special license to host.

Should you require any type of license, be sure to contact us.

For tax receipt info, visit our [tax receipt section](#).

Also, ensure you have a safe venue with appropriate security and fire protection. There should be a clear understanding between volunteers of what to do in an emergency.

Please know that CASA Foundation and its logo are registered trademarks and we cannot accept legal responsibility for events that have not been approved by CASA Foundation.

Step 8. Host your Event

The big day has arrived and you want to make sure everything runs smoothly. Remember that even the most meticulously planned event can have things go awry. Try to think of all the scenarios that could go wrong and come up with a contingency plan. If something does go wrong, *remain calm* – guests should never see you panicking.

Make sure to take tons of photos and remember to have a great time! This is what you have worked so hard for!

Plan to be active on social media during your event.

Tag us in Twitter posts @CASA_FDN and Facebook posts @CASAEdmonton

Tip: Try to thank your sponsors during the event on social media!



Step 9. Post Event Cleanup

The event may be done, but the job isn't. After the event, it is very important to thank all those people who helped make it a success – especially if you had sponsors. Thanking your donors, attendees, and volunteers, even through a simple e-mail or thank you card can go a long way.

Make sure to collect all your funds and donor cards and send them to:

CASA Foundation
Suite 406, 10011 – 109 Street
Edmonton, AB T5J 3S8

Funds need to be received by the Foundation within 30 business days of the event. For more information on fund collection see Step 6.

Tax Receipts

Since CASA Foundation is a registered charitable organization, we are able to issue official income tax receipts. In order to receive a receipt, we must have the donor card associated with that payment (see Step 6.). Monetary donations that are \$20 or more are eligible for income tax receipts. For in-kind donations, donor must provide proof of value in order to receive a receipt.

Some items that are not eligible for tax receipts include: tickets for raffles, auction items, or anything else where the donor receives something for their purchase. This also includes some gift certificates/cards. In accordance with CRA regulations, a gift card that is purchased by an individual and then donated is considered eligible for a tax receipt. A receipt showing proof of value would need to be submitted in order for this to be issued. However a gift certificate that is donated by the issuer (individual, retailer or business that creates the gift certificate/card) is not eligible for a tax receipt. Please ensure you are clear on what is appropriate to receive a tax receipt and what is not before making any promises to a donor.

This being said, there are times when things are partially receiptable. This is for the circumstance where a purchase includes a donation. An example is a dinner event where tickets sell for \$100. Of the \$100, only \$30 is meal & drink cost (fair value). That means the remaining \$70 is eligible to be tax receipted. This also means that if an item is sold for more than its appraised value, and the appraisal value is less than 80% of the selling cost, the purchaser is eligible for a tax receipt.

If you are not sure, it is always best to contact CASA Foundation for clarification.

Insurance

If your event is being held on public property, you may require special event liability insurance. Be sure to check with your event venue or municipality to ensure that you are covered. CASA Foundation will not provide insurance coverage for any Third Party Event, nor will they assume any legal or financial responsibility relating to the third party fundraising event. The Event Organizer must provide proof of insurance, if requested.

The third party fundraising organization or individual shall indemnify and save harmless the Foundation and its directors and officers from and against any loss, expense, claim, liability, damage or action which may arise directly or indirectly from the operation of the activity.

Staffing and Volunteers

It is the Event Organizer's responsibility to provide all staffing and recruitment of volunteers for their event. CASA Foundation is able to provide a letter to volunteers recognizing them for their volunteer hours for your event if requested.

Involvement of CASA Foundation staff and volunteers will be at the discretion of the Foundation and will be based on availability, location and the nature of the event.

Requesting a CASA Foundation Speaker or Representative

If you would like a CASA Foundation representative to attend your event to speak about CASA, or accept a donation, please make this request directly to Ashlee Pearce via email at apearce@casaservices.org. All requests must be specified 3 – 6 weeks prior to the event. Although the Foundation will try its best to accommodate such requests, we cannot guarantee that a representative will be available to attend or participate in the event.

How can CASA Foundation Help?

We love our third party events and we want nothing more than to see every event succeed. Once your event has been approved, CASA Foundation can provide the following support:

- CASA Foundation promotional materials (brochures, posters, etc.) and banners for your event
- CASA Foundation logo for promotional material (make sure to read our [visual identity guidelines](#))
- A support letter verifying that you and your event are raising funds for CASA Foundation
- Posts about your event on our social media accounts and our website
- Donor pledge cards
- Professional advice on event planning and fundraising
- Licenses for raffles, bingos, monte carlo/ Casinos, 50/50 draws
- Guidance to getting liquor licenses

Unfortunately, we cannot provide:

- Funding or reimbursement for any expenses
- Patient, donor, or sponsor lists
- Guaranteed attendance of staff or volunteers for your event
- Logistical support for your event
- Insurance (liability, event, volunteer, etc.)
- Promotion for your event – other than on our website and social media pages
- Prizes

CASA Foundation reserves the right to change or add to these rules as needed.

CASA Foundation is thankful to have your support.

THANK YOU!



CASA

Foundation

supporting children's mental health

*406, 10011 – 109 Street
Edmonton, AB T5J 3S8*

Phone: 780-400-4538

Fax: 780-415-6050

apearce@casaservices.org

www.casaservices.org

Charitable number: 87364 7424 RRR0001