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## Third Party Fundraising Toolkit

One of the many ways to support the Centre Wellington Community Foundation (*CWCF* or *Foundation*) is by planning and/or sponsoring an event to raise funds for the Foundation. This kind of activity is called a *"Third Party" Fundraiser*. In raising money for CWCF, or designating that money to a more focused fund within CWCF, you or your group can help support the many great charitable and nonprofit activities in our community.

### Types of Third Party Fundraisers:

- 1. A group or individual can host an event or sponsor an activity and make the Centre Wellington Community Foundation the beneficiary.**  
*(Example: An organization hosts a golf outing and sends the Foundation a cheque for the net profits.)*
- 2. CWCF can "piggy back" on an existing event, adding a third-party fundraising element, and receive the income produced from that element.**  
*(Example: A company has an annual fundraising week and asks their employees to bring donations for our community Foundation or a municipality has an annual marathon and the sponsor offers registrants the opportunity to get pledges for CWCF.)*
- 3. Invite the Centre Wellington Community Foundation to cooperatively produce an event and share in the profits.**  
*(Example: A local business invites CWCF to participate in an art auction or grand opening. CWCF sends out press releases and provides volunteers to work at the event. In return the Foundation receives a percentage of the proceeds from the event.)*

### Examples of Third-Party Events:

- Golf Tournaments, Step Shows, Road Rallies, etc.
- Marathons, Racing Events, etc.
- Wine Tastings, Black-Tie Events, etc.
- Auctions, Grand Openings, Store Promotions, etc.
- Car Washes, Craft Shows, Bake Sales, etc.
- Casual Days, Holiday Parties, etc.
- Bike-a-thon, Walk-a-thon, Bowl-a-thon, Workout-a-thon, Dance-a-thon, etc.
- Adding a *LOONIE* or a *TWOONIE* onto a retail bill to donate to CWCF (e.g. local shops or restaurants)

We ask all individuals and organizations to submit a Third-Party Fundraiser Event Description for approval prior to including Centre Wellington Community Foundation as a beneficiary of your event. This will help to clearly establish the parameters and expectations for all parties involved in the activity.

To assist you in presenting your third-party event to Centre Wellington Community Foundation, we have created this Third-Party Fundraiser Event Description Form. You may also use the format below to create your own event description form. Third-Party Fundraiser Event Description Forms should be submitted for approval no later than:

- 90 days prior if you wish to have Centre Wellington Community Foundation cooperatively **involved** with your event, depending on the magnitude of the event and the involvement requested by the Foundation.
- 30 days prior to obtain approval for a **beneficiary** or **"piggy back"** event.



CENTRE  
WELLINGTON  
COMMUNITY  
FOUNDATION

PO Box 436  
Fergus, Ontario  
N1M 3E2

1-888-713-4083  
[www.cwcfoundation.ca](http://www.cwcfoundation.ca)

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As a final note, although the Foundation actively encourages third party fundraising events, we must approve all events in advance. This is an important safeguard in preserving the integrity of the name and reputation of the Centre Wellington Community Foundation, as well as our commitment to donors.

We appreciate your interest in fundraising for the Foundation, and we look forward to working with you!

If you have additional questions regarding third-party fundraisers, please contact us at

1-888-713-4083 [info@cwcfoundation.ca](mailto:info@cwcfoundation.ca)



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## THIRD PARTY PROPOSAL FORM

### I. SPONSOR INFORMATION *(Please Type or Print)*

1. Name of sponsoring organization/individual: \_\_\_\_\_
2. Contact person: \_\_\_\_\_
3. Address: \_\_\_\_\_
4. E-mail: \_\_\_\_\_ Website: \_\_\_\_\_
5. Telephone: \_\_\_\_\_ FAX: \_\_\_\_\_

### II. EVENT INFORMATION

1. Who is organizing the event? Company \_\_\_\_\_ Organization \_\_\_\_\_ Individual \_\_\_\_\_
2. What is the nature of your business or organization? \_\_\_\_\_
3. Name and type of event: \_\_\_\_\_
4. Location: \_\_\_\_\_
5. Date(s) and time(s): \_\_\_\_\_
6. Date event will end: \_\_\_\_\_  
*(Event proceeds should be delivered to Centre Wellington Community Foundation within 30 days of this date.)*
7. Please describe the event and include any fees charged for admission or goods and services.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Expected Number of Participants: \_\_\_\_\_
9. Target Audience for the Event: \_\_\_\_\_



10. How will you be promoting the event? \_\_\_\_\_

11. Please attach a copy of any approvals, such as permits and licenses from local authorities, and evidence of liability insurance.

### III. USE OF FUNDS

1. Will the proceeds from your event be donated only to the Foundation?  
Yes \_\_\_\_\_ No \_\_\_\_\_

2. If no, what other charities are involved? \_\_\_\_\_

3. Please indicate how your wish you contribution to be used:

### IV. FINANCIAL INFORMATION

1. How will funds be raised?

Pledges \_\_\_\_\_ Auction \_\_\_\_\_ Ticket sales \_\_\_\_\_  
Product Sales \_\_\_\_\_ Donations: \_\_\_\_\_  
Other (please explain) \_\_\_\_\_

2. Gaming events: If there is to be any gaming at your event, a gaming license is required by law.

Raffle \_\_\_\_\_ 50/50 Draw \_\_\_\_\_ Bingo \_\_\_\_\_

3. Are you approaching sponsors for the event? Yes \_\_\_ No \_\_\_  
If yes, please list organizations being who will be approached:

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

4. Will you require tax receipts for this event? Yes \_\_\_ No \_\_\_  
(please see the Foundation's Policies and Procedures for more information)

5. Within 30 days after the last day of the fundraising event, please send your cheque or money order made payable to the Centre Wellington Community Foundation at P. O. Box 436, Fergus, Ontario N1M 3E2

### V. FOUNDATION INFORMATION

1. What are your expectations of the Foundation?



2. Volunteers: Yes \_\_\_\_\_ No \_\_\_\_\_  
If Yes, How many? \_\_\_\_\_ Hours? \_\_\_\_\_

3. Required Tasks? \_\_\_\_\_

4. Public Speaker: Yes \_\_\_\_\_ N \_\_\_\_\_  
Please provide details: \_\_\_\_\_

5. Representation at Event: Yes \_\_\_\_\_ No \_\_\_\_\_  
Please provide details: \_\_\_\_\_

***NOTE: Staff involvement in your event will be subject to availability and based on event specific details. Please see the Foundation's Policies and Procedures for more information.***

6. Will you require the Centre Wellington Community Foundation's name or logo for promotional use?

Yes \_\_\_\_\_ No \_\_\_\_\_

If "Yes", on what type of materials? Please Specify:

\_\_\_\_\_

***NOTE: The Foundation must first approve the use of the Centre Wellington Community Foundation name or logo on all materials.***

7. What materials from the Foundation would be useful to your event? Please indicate quantities:

Brochures \_\_\_\_\_ Annual Reports \_\_\_\_\_ Other \_\_\_\_\_

8. Would you like the event to be listed on the Foundation's website?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please provide a brief paragraph describing the event (including location and how to purchase tickets):

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

9. Other information the Foundation should know regarding your event

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



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## VI. SIGNATURE

Please review and sign one copy of this form and return it to the Centre Wellington Community Foundation.

This form is due **30 days** prior to the proposed “**beneficiary**” or “**piggy-back**” or event and **90 days** prior to the proposed “**cooperative**” event. Completion of this form does not assure approval. Upon approval, you will receive an approved signed copy of the form for your records. If you have any questions regarding this form or your fund-raising event, please contact the Foundation.

*By signing this document, I/we acknowledge receipt of the Centre Wellington Community Foundation Policies and Procedures for Third Party Fundraisers and agree to comply with all provisions in organizing and holding our fundraising event. I/we also agree with the collection of any and all information the Foundation deems necessary to evaluate the event. I/we further attest that the information provided on this form is correct and accurately describes the proposed event.*

*I/we agree to indemnify and hold the Centre Wellington Community Foundation harmless for any expenses, losses, claims or damages resulting from the fundraising event or the noncompliance with any term or provision of Centre Wellington Foundation Policies and Procedures for Third Party Fundraisers.*

Signature: \_\_\_\_\_

Print/Type Name: \_\_\_\_\_

Date: \_\_\_\_\_

*On behalf of everyone the Centre Wellington Community Foundation serves, our staff and Board of Directors wish to thank you once again for reaching out to us and helping us with our mission to build an strengthen our community. We cannot possibly do all that is needed in our community without your generous support.*

**Please return this form to:**

Centre Wellington Community Foundation,  
P. O. Box 436,  
Fergus, Ontario N1M 3E2