

Wellspring Cancer Support Foundation has developed this policy in accordance with the Canada Revenue Agency (CRA) Guidance on Fundraising and through research of best practices and procedures in the charitable sector.

Our goal in creating this policy is to assist volunteers and community partners in their plans to support Wellspring, and provide a clear understanding of the support they can expect from Wellspring and its staff in return.

Agreement Parameters

All Third Party fundraising events in support of Wellspring will be expected to meet the following requirements:

1. Third Party Events need the consent and / or approval of Wellspring's Events / Fundraising staff, in advance of undertaking the organization and execution of an event for Wellspring.

Obtaining approval is simple. Organizers are asked to complete Wellspring's [AnswerCancerNow™ Third Party Event Proposal Form](#).

It is the responsibility of Third Party Event organizer(s) to complete this form, allowing adequate time for Wellspring to review the applications, and provide any required support. After completing the online form, a Wellspring staff member will be in touch with you.

2. All Third Party Event activities should uphold and reflect the mission and values of Wellspring: *"To create the best programs to meet the psychological, emotional and educational needs of individuals and families living with cancer and deliver those programs to people in Canada."*

Note: We expect organizers to ensure that all planned event elements are within the boundaries of our focus on the promotion of wellness. Therefore, we will not agree to any events or partner with any groups that go against Wellspring's mission and values. We are happy to discuss the details of your event to ensure it best meets the needs of all parties involved.

3. Fundraising activities benefit Wellspring's operations and / or programs. You can designate your support on the [AnswerCancerNow™ Third Party Event Proposal Form](#), however Wellspring will also be happy to help you choose the most appropriate designation of your support depending on your particular event and interests. Should you not indicate a designation, the proceeds will be put toward the area(s) of greatest need.
4. We ask that event organizers inform Wellspring, at the time of application, if the Third Party Event is to benefit additional charitable partners.
5. Wellspring **will not** solicit sponsors on behalf of any Third Party Event and / or organizer(s), nor will Wellspring provide contacts for sponsorship approaches and solicitations.
6. All raffles, 50-50 draws and sales and licensed events, require the appropriate permits or licenses. Organizers are also required by law to adhere to all applicable federal, provincial or municipal regulations.
7. Third Party Event organizer(s) are required to cover the costs of any licenses or permit and are responsible for picking up the required permits / licenses and having them available and clearly displayed on site for the duration of their event; as well as for filing all required post-event reports.
8. We request that event organizers provide reasonable notice (e.g., two weeks) to Wellspring should there be significant changes from their submitted proposal, including type of event, date, venue,

Tax Receipting Policy

As a registered charity, Wellspring may, provide receipts for income tax purposes, for donations incurred through a Third Party Event, and for which:

- a) Complete requested documentation has been provided, and
- b) Donations are deemed receiptable by the CRA.

Tax receipts will be provided for those who make a voluntary personal contribution or donation to Wellspring. **According to CRA guidelines, tax receipts will only be issued for gifts / portions of gifts for which no material goods or benefits are**

returned to the donor in exchange for the donation. Wellspring will provide tax receipts for donations starting at \$20, or if otherwise requested.

Information about issuing charitable tax receipts is outlined on the [Third Party Event Proposal Form](#). In order for Wellspring to issue charitable tax receipts, event organizers must ensure this form has been submitted to Wellspring 60 days prior to the event date.

If, as an event organizer, you activate your own online event page using Wellspring's [AnswerCancerNow™ online tool](#), all donors who support you through that site will automatically receive electronic tax receipts.

To provide charitable tax receipts for any other participants and / or donors, the event organizer needs to provide Wellspring with a detailed report of donations, within 30 days following the event. Please submit this information electronically, including for each transaction / receipt, the donor's name, full mailing address, donation amount, payment method and, if available, the donor's email address and telephone number with area code.

Note: For ticket purchases, please indicate the value of any benefits received by the participant (e.g. food and drink, entertainment, gift bags, etc.), as this amount must be deducted from the full ticket price when determining the allowable receiptable portion of the contribution.

Tax receipts will NOT be provided directly to Third Party Event organizers directly, but rather to those known to have made the gift(s). Event supporters can expect to receive their tax receipt within four weeks of Wellspring receiving the information donation report.

As a general rule, Wellspring does NOT issue tax receipts for in-kind or non-cash gifts, such as gifts of goods, services and / or property (elements other than cash and marketable securities). Also, please note that Wellspring cannot issue tax receipts for purchases of raffle tickets or auction items, or for event sponsorships. For these, an acknowledgement letter can be issued indicating the fair market value of gifts-in-kind or

sponsorships, as many companies deduct these as business expenses, with associated tax benefits.

Wellspring retains the right to exercise discretion and to review and approve or disapprove the receipting decisions.

Donations and Sponsorships

When submitting donor information to Wellspring, please provide a list of sponsors who have supported or sponsored your event, including full contact information and a description of their donation and / or sponsorship, value and the monetary value of the associated goods and exposure they received.

With such information, Wellspring can't appropriately acknowledge and recognize our supporters in the community. Wellspring is entitled to final approval of all sponsors prior to confirmation of any gifts / sponsorships and / or fulfillment of associated recognition / marketing exposure.

Note: Wellspring requires approval of all corporate / sponsorship prospects prior to any solicitations or approaches by Third Party Event Organizers or Volunteers.

Communications and Promotions

Third Party Event promotional materials must reflect that Wellspring is the beneficiary of the net proceeds of the event. Wellspring cannot be, or appear to be, in partnership with an organization, involved in a third party event, or in collaborating with the organizers or their sponsors.

To reflect this relationship, we suggest the following wording:

- *XYZ Event in support of Wellspring Cancer Support Foundation; or*
- *All proceeds from XYZ Event will be donated to Wellspring Cancer Support Foundation.*

It is important for Wellspring to maintain brand integrity and consistency in dealing with the public and, as such, Wellspring requires all third party event organizers to acknowledge the Wellspring name, as one of:

- Wellspring Cancer Support Foundation (first reference);
- Wellspring Downtown Toronto;
- Wellspring Birmingham Gilgan House;
- Wellspring Westerkirk House;
- Wellspring Chinguacousy; or
- Wellspring (subsequent references).

The Wellspring logo is the sole property of Wellspring and is to be used only with the express written and advance consent of Wellspring and its designates. Once your event proposal has been received and approved, we will provide you with access to the use of the Wellspring logo. Wellspring requires right of final approval on any event materials, including brochures, flyers, invites, e-blasts, web postings, etc. which feature our logo.

Note that Wellspring reserves the right to refuse involvement in and the use of its name and logo for any event without express approval or that contravenes or undermines our organizational mission or values in any way. Additionally, Wellspring can withdraw the use of its name and logo at any time leading up to / during an event, without liability or obligation, and / or relinquish support of any Third Party Event that does not abide by the policies, criteria and guidelines set out in this agreement.

Staffing and Volunteers

Wellspring can offer guidance and support leading up to and possibly on the date of your event, including answering questions and providing limited promotion on our website and on social media channels.

Wellspring *may* be able to help provide limited promotional materials, design support, volunteer support and / or an event speaker. We would be happy to display posters at our centres, *but we cannot sell tickets to our members directly*. Wellspring does not sell tickets to Third Party Events.

While Wellspring welcomes and appreciates all third party events and event organizers, the onus is on the organizers to undertake the primary functions involved in strategizing and executing a successful event, including:

- Recruiting volunteers to help organize and attend your event;
- Securing sponsors, as required, for your event;
- Designing, producing and displaying promotional materials;
- Inviting guests / selling tickets;
- Funding or reimbursing all event expenses;
- Planning and execution of the overall event;
- Procurement of any / all required licenses or permits; and
- Submitting, on a timely basis, all net proceeds to Wellspring.

Wellspring will make every effort to attend your event if requested. Depending on the size, scale and timing of your event, a representative from Wellspring may attend as a speaker, volunteer or guest. If you would like to have a Wellspring representative attend, please budget for appropriate ticket and travel expenses. .

Additionally, we would be happy to provide a letter of support to be used to validate the legitimacy of your event and / or its organizers as extensions of Wellspring's fundraising efforts. As appropriate / available, we often can include information, if approved, in Wellspring's publications.

Finance & Insurance

While Wellspring is extremely grateful for all of our community partners and their generous support, we unfortunately are unable to:

- Incur any liability resulting from an event;

- Underwrite any third party event and associated expenses or cover salaries to organizers;
- Extend Wellspring's insurance to cover third party events; and
- Collaborate with any third party events or organizers who do not agree to indemnify and hold harmless Wellspring and its Board of Directors, employees and volunteers from any and all claims / liabilities in any way related to their event(s).

Wellspring strongly advises all organizers of third party events involving physical activity to ensure that all participants sign valid legal disclaimers that waive all claims of physical, personal or financial liability against the organizers and their agents.

Third Party Event Organizers will be responsible for any financial losses or unsettled accounts. Please note that Third Party Event Organizers do not have the authority to name Wellspring in any signed contracts.

Unfortunately, due to limited staffing and resources, Wellspring cannot:

- Directly solicit its membership / donor base;
- Support and / or endorse any events featuring alcohol and / or gaming which are not properly licensed / permitted by the Alcohol and Gaming Commission of Ontario (AGCO). These include but are not limited to, bingos, raffles, social gaming, wine auctions, etc.; and
- Host an event, solicit donations or sell tickets on Wellspring property.

For information or to discuss your particular event needs, please one of the following representatives:

For events in Downtown Toronto and surrounding areas:

Nicole Beier
 Events Specialist
 416-961-1928 ext. 241
nicole@wellspring.ca

For events in Halton-Peel, Brampton and Surrounding areas:

Claudia Connor
 Events Specialist
 416-522-3642

Claudia@wellspring.ca

Thank you for considering Wellspring with your support – we are truly grateful!