



Third Party Fundraising Kit Outline:

1. About Sombrilla

Who we are

Founded in 1985, Sombrilla International Development Society is an Alberta-based independent Non-Governmental Organisation (NGO). We are non-denominational and non-partisan. “Sombrilla” is the Spanish word for “umbrella”. It symbolizes the partnerships between organized communities from Canada and Latin America that assist in sheltering vulnerable populations from oppression while promoting community participation.

Vision

Fostering partnerships for social justice.

Mission

Sombrilla partners with communities in Latin America to empower them to assert their demographic, economic, cultural and social rights. We strive to improve quality of life by addressing needs such as food security, clean water, health care and education so that communities may become self-sustaining.

What we do

Partner with communities in Central and South American counties to:

- promote the sustainable development of marginalized communities
- promote local capacity building within marginalized communities
- promote respect for human rights and good governance among partner communities
- operate and manage development projects
- participate in emergency relief responses to natural disasters
- promote development-related research
- facilitate volunteer placements of young Canadians in overseas development opportunities
- raise funds from all segments of the community to support Sombrilla’s projects
- engage all Canadian public in development education, highlighting our links and responsibilities to countries of the South.

2. Sombrilla's policies and how we support you

- **Approval**

Prior approval to hold a third party fundraising event for Sombrilla is required. Approval is based on the type, theme and financial viability of the event. Sombrilla reserves the right to withhold the use of its name and logo from any event it feels does not support our vision and mission.

- **Logo Usage**

The Sombrilla logo is the property of Sombrilla. Therefore, the logo is used only with the authorization of Sombrilla and with the approval of the third party fundraising event.

Once your event is approved, Sombrilla will send you the logo in PDF form (unless other format is requested), which is not to be altered in anyway. In order to maintain consistency with the Sombrilla logo and brand, we have developed a Brand Standard Guide (see Resources) for you to use and abide by. This guide outlines the appropriate use of all Sombrilla colours, logos and fonts.

- **Promotions**

Sombrilla will approve all promotional/advertising copy featuring the Sombrilla name and logo. If you're designing your own poster, send it to Sombrilla for approval so we can help you check it against our Brand Standard Guidelines before you display or distribute it. All promotional material must state that your event is "in support" of Sombrilla and not an official Sombrilla event.

- **Insurance**

If you're holding your event on public property, you may require public liability insurance. Be sure to check with your event venue or municipality to make sure you're covered.

Sombrilla does not provide insurance coverage for any third party event, nor will they assume any legal or financial responsibility relating to the fundraising event or Event Organizer. The Event Organizer must provide proof of insurance, if requested.

- **Licenses**

Many venues will already have appropriate licenses (e.g. liquor licenses), but do your due diligence and confirm these details before booking your event.

If you are coordinating a draw, raffle or other appeal that involves selling a ballot or item to the general public, you may be required to obtain gaming permits and/or licenses. It is the responsibility of the event organizer to obtain

appropriate documentation and/or license to conduct the fundraising activity. See Alberta Gaming and Liquor Commission for more information <http://www.aglc.gov.ab.ca/raffle/licenceandeligibility.asp>.

○ **Sponsorship**

Please provide a list of sponsors who have donated to or sponsored your event and include a description of their donation and/or sponsorship plus the retail value. This allows Sombrilla to better recognize partners in our community. Sombrilla will have final approval of sponsors.

Sombrilla will not solicit sponsors on behalf of the event organizers, nor will they provide contacts for sponsorships.

○ **Staffing and volunteers**

The event organizers will provide all staffing and recruitment of volunteers for their event. Sombrilla is happy to provide a letter to your volunteers recognizing them for their volunteer hours for your event. If you have a volunteer who requires a letter, please get in touch with our office. Involvement of Sombrilla volunteers will be at the discretion of Sombrilla and will be based on availability, location and the nature of the event.

○ **Sombrilla Speakers**

Sombrilla representatives are happy to attend your event to speak about Sombrilla, who we are and what we do. However, we cannot guarantee that a representative will be available to attend or participate in the event. Please provide 3 – 6 weeks notice prior to events that require assistance or a representative.

To book a Sombrilla representative to speak or to accept a donation at your event, please email connect@sombrilla.ca.

○ **Tax Receipts**

A tax receipt is given to people who make a personal donation to a registered charity. Sombrilla issues official income tax receipts in accordance with the guidelines set by the Canada Revenue Agency. The donation must be made directly to Sombrilla (e.g. writing their cheques out to Sombrilla) and without personal return. All cash donations of \$25.00 or more are eligible for receipts. Donation “in-kind” (an item or service) may not be receiptable, so please check with our office to confirm eligibility. We require the following information to properly process a tax receipt:

- Donor’s Name

- Donor's Address (including postal code)
- Amount of Donation

Tax receipts cannot be processed by Sombrilla unless the event organizer remits the funds. Processing tax receipts takes 4-6 months after the donation has been received through the Sombrilla office.

3. Your event

a. **Before you start**

Here are a few important things to consider before you start planning your event:

- **Get in the know.** People are more likely to donate or volunteer to help if you can clearly articulate why a cause is important and why you need their support.
- **A good idea can sell itself.** Brainstorm, research and test out your fundraising idea on friends, family and colleagues. Would they be likely to attend and/or give?
- **Helping hands.** Do you have a committee to help you organize the event? What are the talents and skills of the people you have recruited on the planning committee? In addition to the committee, do you have volunteers to commit their time at the actual event?
- **Know your audience.** Who are you trying to attract to your event? Tailoring the size of your event to the size of your potential audience helps you narrow options for suitable events and venues, and will give you a better idea of how much advance planning and promotion will be required.
- **Set realistic goals.** Setting a realistic fundraising goal helps motivate your team members and gives your supporters something to work towards. This often encourages them to be more generous to ensure you achieve your goal.
- **Don't over-commit yourself.** Give yourself enough time and enlist adequate help to ensure all the elements of your event can be completed successfully. You might consider starting with a small event and work your way up to organizing larger events as you gain more experience.
- **Have a back-up plan.** Make sure you have a contingency plan, especially if your event is dependent on unpredictable factors like the weather. Setting a rain date, or arranging an indoor venue as a backup, may take a bit of extra planning up front but it will help ensure that the results of your hard work aren't limited by factors you can't control.
- **Timing is everything.** The timing of your event often determines how successful it will be. Check out whether there are competing events on the day or time you have chosen. To give your event special relevance, schedule its theme to coincide with special days. This is a good time to hold an event.
- **Budget.** A good rule of thumb when planning a fundraising event is not to allow the costs to exceed 50% of the revenue you hope to generate.

b. Event ideas

Below is a list of fundraising ideas to help inspire, motivate and lead you on the way to your own fundraising experience!

A-thons: walk, dance, bowl, skip, exercise, sit, skate, swim

Sales:

- Auctions (art, silent, service)
- Food sale
- Services (car wash, yard work, snow shoveling etc.)
- Arts and crafts
- Point-of-purchase (pin-up campaigns)
- Rummage sale
- Book sale

Tournament:

- Sports tournament (golf or other sport where an entry fee is donated)
- Games tournament (board games, chess, card games)

Entertainment:

- Trivia night
- Movie night
- Benefit concert (e.g. battle of the bands)
- House concerts
- Speaker series
- Talent/variety show
- Fashion show
- Casino night
- Guided tours/backstage tours

Party/festival:

- School dance
- Theme party (costume, red carpet)
- Carnivals
- Dinner/dance
- Picnic
- Benefit BBQ
- Gala event

Other/Add—ons:

- Drives (bottles, cans, loose change, clothing swap)
- Raise to shave (donate money to shave heads, beards etc.)
- Dunk tank
- Raffles (refer to Licenses under Sombrilla's policies and how we support you section)
- Casual day
- Fifty-fifty draw

- Cook off
 - Speed dating
 - Jar guesses (candy, coins)
 - Donations in lieu of birthday, wedding or other celebration gifts
 - Find a corporate sponsor to match the donations you raise
- c. Approval:** Event organizers must contact Sombrilla for approval prior to promoting the event. All planned third party fundraising events must:

- Be consistent with the vision and mission of Sombrilla
- Maintain a positive presentation and give Sombrilla positive exposure and increased public awareness.
- Submit a Third Party Fundraising Agreement and receive approval from a Sombrilla representative.

d. Promoting your event

○ **Media:**

If you're planning a large event, you might consider sending a press release to local newspapers, radio and TV stations to try to get editors interested in doing an advance story, covering your event or taking photos. Local news outlets love human interest stories, but they receive so many requests to cover fundraising events you often need to have a unique angle, so don't be discouraged if they don't respond to your release.

If a reporter does contact you, tell them about your event, what you have planned, why you're doing it, etc., but if a reporter has any questions about Sombrilla, please refer them to us directly at connect@sombrilla.ca or through our website www.sombrilla.ca. If the media doesn't cover your idea for a story, you can still get media promotion on their daily event calendars by submitting a media advisory a minimum of one week in advance. Be sure to follow up with all media outlets a couple of days in advance of your event to make sure they received your advisory and intend to list it on their event calendars.

Sample Media Advisory

TO: Media name, editor or reporter name

DATE/TIME: Sunday, May 10th, 2:00-4:00 P.M.

LOCATION: Hawrelak Park, Edmonton, AB

WHAT: Carnival for Sombrilla

To provide a day of entertainment where people can spend a full-filled day with the family all while raising valuable funds for Sombrilla. Admission is \$10 and the event will also include a silent auction and refreshments. All proceeds will benefit Sombrilla programs benefiting vulnerable Latin American communities.

CONTACT: For further information please contact:

Your name, e-mail and phone number

- **Online promotion:**
Social networking sites like Facebook, Instagram and Twitter are quick and efficient ways to spread the word about your event to all your friends and followers. For example, Facebook Event Pages are a great way to inform everyone in your contact list about your event. You can also ask them to forward it to their friends as well. Be sure to tag or mention Sombrilla so we can share the post with our followers as well. Also check out online event calendars serving your community such as municipal or community centre websites to see if they will accept a posting for your event.
- **Other:** Community bulletin boards, e-mail blasts, phone calls, posters and flyers, word-of-mouth

e. Planning checklists

Planning an event is easy if you're organized. Use these step-by-step checklists to assist you in remembering everything that could help make your event a success! Find the Before, During and After your event checklists in the Resources.

4. Resources

- a. Third Party Fundraising Agreement
- b. Sombrilla's Brand Standards
- c. Letter of Support
- d. Poster Template
- e. Event Checklist
- f. Donation Request Form
- g. Speaking Notes
- h. Sample Acknowledgement Letter
- i. Event Feedback Form