

KGH FOUNDATION

Independent Fundraising Event Guide

Giving **Changes** Everything.

TABLE OF CONTENTS

GIVING CHANGES EVERYTHING

Why support the KGH Foundation?	3
Where will your money go?	3

STEP-BY-STEP GUIDE

1. Contact Us.....	4
2. Event Ideas.....	4
3. Fundraising Opportunities	4
4. Get Organized	5
5. Set the Date & Venue	5
6. Set your Fundraising Goal & Budget.....	5
7. Licenses	5
Gaming Activities	5
Special Occasion Liquor (SOL) License	6
8. Donations & Tax Receipts	6
Tax Receipting Guidelines	6
Tax Receipts.....	7
Event Information Required for Gifts with Advantage	7
Gifts out of Inventory	8
9. Recruit Volunteers	8
10. Use of KGH Foundation Name & Logo	8
11. Promote Your Event	8
12. After the Event.....	9

RESOURCES

Online Toolkit	9
Contact.....	9

APPENDIXES

Appendix A – Independent Fundraising Event Application.....	11
Appendix C – Pledge Form.....	16

GIVING CHANGES EVERYTHING

Why support the KGH Foundation?

Kelowna General Hospital (KGH) has a vision to provide the best care as close to home as possible. The community’s support helps to fulfill some of our hospital and its associated facilities’ most urgent needs.

Your contribution will allow the purchase of different types of highly specialized medical equipment needed to care for patients, ranging from our tiniest babies to our most senior citizens. It also provides patient comforts that would otherwise be unavailable.

Thanks to supporters like you, KGH is now a world-class facility and is attracting some of the country’s top physicians. By deciding to organize a fundraising event, you have chosen to make a difference and to help change lives.

Where will your money go?

A gift to the KGH Foundation goes toward the purchase of medical equipment and patient comforts right here in Kelowna for this year, next year, and generations to come.

Our current area of focus is the **JoeAnna’s House** campaign to build a home away from home for families requiring travel to KGH for care. At any given time, one in four hospital beds is occupied by someone from outside the Central Okanagan. JoeAnna’s House will keep families together when the need each other most.

You may wish to designate your event’s proceeds to a particular area of interest (subject to IH’s approval), or provide the Foundation with the flexibility to address priority needs.

Some of our funds available for designation include:

- General - Area of Greatest Need
- Cancer Care
- Cardiology
- Children’s Care
- Emergency Department
- General Education
- Hospice Palliative Care
- Orthopaedic
- Psychiatry / Mental Health
- Rehabilitation Services
- Spiritual Care
- Thoracic / Respiratory

You can also support Interior Health’s care homes within the Central Okanagan including Brookhaven, Cottonwoods, David Lloyd-Jones, Three Links Manor and Hospice House. For more information on areas of need, visit kghfoundation.com or call 250-862-4438.

STEP-BY-STEP GUIDE

1. Contact Us

The staff at the KGH Foundation are here to help! Let us know that you're planning on hosting a fundraiser by filling out our Independent Fundraising Event (IFE) Application and don't hesitate to ask any questions that come up along the way. We can help provide ideas, information and support for your event.

We also have lots of resources and tools available online at www.kghfoundation.com. There's a full electronic toolkit with sample letters, a poster template and information sheets about the KGH Foundation and our fundraising campaigns.

2. Event Ideas

There's no lack of options when it comes to fundraising events. Here are a few ideas to get you started but you can really turn anything into a fundraiser with a little creativity.

- Bottle Drive
- Car Wash
- Lemonade Stand
- A-thon (swim-a-thon, read-a-thon, sing-a-thon)
- Craft Sale
- Pancake Breakfast
- Mini-golf Tournament
- Jeans Day
- Pizza Lunch
- Art/Fashion/Talent Show
- Sports Party (Super Bowl, Stanley Cup Playoffs)
- Gala Dinner

3. Fundraising Opportunities

So you've picked an event, now how do you raise money? Here are a few ways you can generate revenue.

- Ticket Sales
- Live or Silent Auction
- Percent of Food and Beverage Sales
- Pledges
- Sponsorship

4. Get Organized

Organizing a successful fundraising event takes a lot of hard work and planning. Depending on the size of your event, you may want to consider rounding up a few skilled and enthusiastic volunteers to form an organizing committee. This way you can split up the responsibilities and collaborate to manage everything efficiently.

5. Set the Date & Venue

You have the ‘what’ – now it’s time to pick the ‘when’ and ‘where’. Check local event calendars to ensure you pick a date that doesn’t compete with existing community activities to get the best turnout possible.

Things to consider when selecting a venue are rental costs, included amenities like tables & chairs, kitchen or catering facilities, accessibility, capacity and licensing or insurance requirements. And if you’re thinking outdoors, don’t forget to come up with a plan B in case of bad weather!

6. Set your Fundraising Goal & Budget

Set a fundraising goal for your event and plan how you expect to reach it. Create a budget to manage your expenses and estimate your revenues. Setting an itemized budget helps you ensure you’ve set a realistic target and keep your expenses on track.

7. Licenses

Depending on your event and its fundraising activities, some licenses may be required. To confirm, check with the City, Police, Liquor Control & Licensing Branch and Gaming Policy & Enforcement Branch.

Gaming Activities:

- Any gaming activities (e.g. ticket raffles, poker, bingo, casinos, etc.) require a license
- All gaming funds raised by a community fundraising group must be donated to an eligible organization. Each application from a community fundraising group (i.e. you) must have an accompanying letter from the eligible recipient organization (i.e. KGHF) that acknowledges the event, agrees to accept the proceeds and agrees to use them for eligible purposes.
- Community fundraising groups may only apply for a Class B ticket raffle only (gross revenue of \$20,000 or less).
- All gaming funds must be identified as such in your reporting back to the KGH Foundation.
- For more information or to apply: <https://www.gaming.gov.bc.ca/licences/>

Special Occasion Liquor (SOL) License:

- If you want to serve or sell liquor in a public space that is not licensed, you will need a Special Occasion License: <https://solo.bcldb.com/>

Other common licenses and permits required for events include Outdoor Event Permits for City owned properties, Temporary Food Service Permits from Interior Health, and SOCAN Licenses for publicly played music.

8. Donations & Tax Receipts

The Kelowna General Hospital Foundation is a registered charity and under the *Income Tax Act* can issue official donation receipts to donors for gifts.

Donors to your event are only eligible for tax receipts if they donate directly to the KGH Foundation (e.g. writing their cheques out to ‘KGH Foundation’) – these donations will be attributed to your fundraiser since your event inspired the gift. In order to be issued a charitable tax receipt, the gift must be accompanied by the true donor’s full name and mailing address and submitted within 30 days of your event to prevent delays in receipting donors. Donations of less than \$20 will not be receipted.

Independent Fundraising Events are subject to Canada Revenue Agency (CRA) guidelines. Please note that official donation receipts cannot be issued for event registration/tickets, purchasing raffle tickets, merchandise, auction items or sponsorships. For more information please visit <http://www.cra-arc.gc.ca/chrts-gvng/>.

Event organizers must submit their money within 30 days of their event and cheques made payable to the KGH Foundation. Cash can be collected and exchanged for a bank cheque made payable to KGH Foundation.

If you have any questions regarding what does or does not qualify for a charitable tax receipt, or how best to manage your event finances, please don’t hesitate to ask one of the KGH Foundation staff.

9. Recruit Volunteers

You may need a few extra hands for your event to make sure it goes off without a hitch. Figure out what jobs need to be done and start recruiting to fill those positions. Castanet, Kelowna Community Resources and local newspapers are great resources for volunteer recruitment.

10. Use of KGH Foundation Name & Logos

Once you have completed your Independent Fundraising Event Application, we would be pleased to send you our logo for use on your event materials. We have several file formats and colour options available so let us know if you need something in particular. Please do not stretch, remove elements, or alter the colours of our logo.

11. Promote your Event

You’ve done all of the hard work to plan your event – now it’s time to get people there! The KGH Foundation can help spread the word by listing your event on our website, sending out an e-blast to all staff of KGH, and sharing it on our social media sites.

To spread the word you can distribute posters around town, create posts for online event listings, and share via social media. It also may be worth considering submitting a release or story to the local media outlets. And don’t forget to check out the online tools at www.kghfoundation.com.

12. After the Event

Congratulations – you did it! Now it’s time to count and submit the funds you raised to the KGH Foundation. Complete the necessary required forms and bring to the KGH Foundation within 30 days of your event. And make sure to send along some photos and highlights from the day so we can share your success!

And don’t forget to thank those who helped make your event a success. When their efforts are recognized they’ll be more excited to help you at your next fundraising event.

RESOURCES

Online Toolkit

- Personal Fundraising Page
- IFE Guide
- JoeAnna’s House Information Sheet
- Fundraising Tips & Ideas
- Poster Template
- Cash Reconciliation Sheet
- Sample Letters
- Photos & Videos
- Copies of all Appendixes

Contact

Chandel Schmidt
 Annual Programs Officer, KGH Foundation
 p. 250.862.4300 local 7018
 f. 250.862.4377
 e. chandel.schmidt@interiorhealth.ca

APPENDIXES

Appendix A – Independent Fundraising Event Application

- To be completed for all events prior to promoting the event

Appendix B – Pledge Form

- To be completed when used within 30 days of event

Thank you for your support!
Giving **Changes** Everything.

Appendix A
INDEPENDENT FUNDRAISING EVENT APPLICATION

Thank you for your interest in supporting the KGH Foundation. If you, or your organization, wish to host a special event or program to benefit the KGH Foundation, we request you submit this completed proposal to the Foundation for approval.

Once the event has been officially approved, a signed copy of the attached agreement form will be forwarded to the applicant. If you have any questions concerning this application or the agreement, please call the Foundation office at 250.862.4438.

NOTE: Application must be approved by the KGH Foundation prior to publicizing or holding event.

CONTACT INFORMATION:

Name of organization/individual planning the event:

Please select the category that best describes you:

- Corporation School Community Service Club Individual

Contact name: _____

Mailing address: _____

City: _____ Postal code: _____

Phone (business): _____ Phone (home/cell): _____

Email: _____

EVENT INFORMATION:

Name of Event: _____

Type of Event:

- One-Time Annual Ongoing

Date of Event: _____

Location of Event: _____

Date contribution to the KGH Foundation is expected: _____

Target Market:

- Family/Friends Members Customers General Public

What inspired you to hold this event? (e.g. connection to Kelowna General Hospital?)

FINANCIAL INFORMATION:

Proposed Budget: All costs to come out of the proceeds or to be paid directly by the event organizer.

TOTAL EXPECTED INCOME: (donations, auction, ticket sales, food & beverage sales) A. \$ _____

EXPENSES: (advertising, food, entertainment, rentals) B. \$ _____

ANTICIPATED NET PROCEEDS: (A minus B equals C) C. \$ _____

AMOUNT/PERCENTAGE OF NET PROCEEDS: (to be given to KGHF) D. \$ _____

In an effort to maintain transparency to our donors and supporters, we request that any event advertised as being held in support of the KGH Foundation should not have expenses that exceed 50% of gross proceeds. At a minimum, 50% of net proceeds should benefit the KGH Foundation.

In order to keep administrative costs down, we ask that money submitted be in the form of one cheque and a copy of the event agreement form, or a letter, accompanies the cheque outlining the name and date of the event along with any other pertinent information. If there are pledge forms to submit from your event, please attach one cheque for the overall balance along with the detailed pledge forms.

SUPPORT PROVIDED BY THE KGH FOUNDATION:

Please indicate if you require any of the following promotional tools from the Foundation.

- Event listed on KGH Foundation website (based on space and lead time)
- Electronic poster distribution
- Banner (pop-up stand)
- Representation or a speaker at the event

*Please provide a short promotional blurb - including contact details, event location, dates, and times. In order for us to fulfill your request for support, a minimum of two weeks' notice prior to the start of your event/campaign is recommended.

EVENT DETAILS:

Briefly describe the event and how the funds will be raised (if you have done a similar event for the KGH Foundation in the past, it is not necessary to complete this section).

PUBLIC RELATIONS INFORMATION:

Briefly describe the proposed publicity plan for the event/program.

Will the publicity be handled by a professional agency? Yes No

If yes, please name the agency: _____

Will promotional materials, such as flyers and posters, be printed? Yes No

If yes, please indicate the extent of distribution and dates of release: _____

Does your organization plan on using the name of the KGH Foundation in your printed materials and in your publicity? Yes No

Please note: All materials featuring the name of the KGH Foundation must be approved by the Foundation before publication.

Privacy Statement

The KGH Foundation is committed to protecting the privacy of personal information in our possession; the information collected on this form will be used by Foundation staff strictly to contact you about this event. If you have any questions about our privacy statement, call us at 250.862.4438.

INDEPENDENT FUNDRAISING EVENT POLICIES

Independent Fundraising Events are a very important component of the fundraising activities of the KGH Foundation. Beyond the funds raised, these events create awareness about the hospital and bring new support to the Foundation.

In order to ensure independent special events have a positive impact on the hospital’s public image, the following policies need to be followed:

1. The KGH Foundation logo is a registered trademark; unauthorized use is prohibited.
2. Official tax receipts will only be used in accordance with the Canada Revenue Agency guidelines. The final decision to issue official tax receipts rests with the KGH Foundation.
3. Event expenses may not be paid from tax-receiptable donations. All donations requiring a tax receipt must be received in full by the KGH Foundation.
4. Whenever possible, the Foundation would appreciate written information or photographs which may be included in our publications.
5. The KGH Foundation does not approve the following types of fundraising:
 - a. Programs that involve a professional fundraiser, telemarketing and/or an agreement to raise funds on a commission, bonus or percentage basis (with the exception of cause-related marketing programs developed with corporate partners).
 - b. Events which promote the use of tobacco
 - c. Vending machine sales

- d. Directly soliciting funds door-to-door, through telemarketing, or through non - foundation internet methods
- 6. Guest attendees from the KGH Foundation will receive complimentary tickets or admission when invited to speak or attend an independent special event.
- 7. Terms and conditions with respect to insurance coverage:
 - e. The KGH Foundation’s special/sporting event insurance policy **does not extend** to this event. Third party organizers are required to arrange for appropriate insurance coverage for the event. By accepting the terms and conditions set forth in this application, the event organizer(s) clearly understand that they are accepting responsibility for claims that may arise as a result of the event.

AGREEMENT for Special Event or Program benefiting the KGH Foundation, the **SPONSORING ORGANIZATION**, agrees to organize and implement a special event/program on, to benefit the KGH Foundation. The special event/program shall be described and referred to publicly as follows:

- The **SPONSOR** agrees to use only the authorized name of the KGH Foundation in any media and printed materials related to the special event (if name is to be used).
- No cost or liability associated with this event shall be incurred by the KGH Foundation.
- The KGH Foundation agrees to provide the **SPONSOR** with the appropriate recognition
- The **SPONSOR** agrees to handle any monetary transactions and to present the proceeds to the KGH Foundation within **30 days following the event.**
- The **SPONSOR** will provide staffing and volunteers for the special event.
- The **SPONSOR** agrees to use its own mailing list for the special event.
- The **SPONSOR** will obtain all necessary permits, licenses or insurance.
- The **SPONSOR** agrees to follow the KGH Foundation’s receipting policies that adhere to the Canada Revenue Agency.
- The KGH Foundation reserves at any time the right to withdraw the use of its name.
- If the event is cancelled, the sponsor will notify the KGH Foundation 2 weeks prior to the original event day.

Signed: _____
Sponsor

Date: _____

Signed: _____
KGH Foundation

Date: _____

Please return the completed form to:

2268 Pandosy Street
 Kelowna, BC V1Y 1T2

Fax: 250.862.4377
 Email: kghfoundation@interiorhealth.ca

Appendix B
PLEDGE FORM

Event Information

Name of Fundraising Event: _____

Date: _____ Contact: _____

Donor Information

- Donor’s name and address must be complete in order to receive a tax receipt
- Charitable tax receipts will be issued for any gift of \$20 or greater
- Make cheques payable to KGH Foundation
- Charitable Registration #11897 8733 RR0001

First Name _____ Last Name _____ This gift is <input type="checkbox"/> Personal <input type="checkbox"/> Corporate Business Name _____ Address _____ City _____ Prov ____ PC _____ Phone _____ E-mail _____ <input type="checkbox"/> Cash <input type="checkbox"/> Chq <input type="checkbox"/> Card Credit Card # _____ Exp ____ / ____ Cardholder Name _____ Signature _____	Donation Amount (\$)
First Name _____ Last Name _____ This gift is <input type="checkbox"/> Personal <input type="checkbox"/> Corporate Business Name _____ Address _____ City _____ Prov ____ PC _____ Phone _____ E-mail _____ <input type="checkbox"/> Cash <input type="checkbox"/> Chq <input type="checkbox"/> Card Credit Card # _____ Exp ____ / ____ Cardholder Name _____ Signature _____	Donation Amount (\$)
First Name _____ Last Name _____ This gift is <input type="checkbox"/> Personal <input type="checkbox"/> Corporate Business Name _____ Address _____ City _____ Prov ____ PC _____ Phone _____ E-mail _____ <input type="checkbox"/> Cash <input type="checkbox"/> Chq <input type="checkbox"/> Card Credit Card # _____ Exp ____ / ____ Cardholder Name _____ Signature _____	Donation Amount (\$)
TOTAL DONATION	

