

KGH FOUNDATION

Community 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. Reach out.....	4
2. Event Ideas.....	4
3. Fundraising Opportunities	4
4. Get Organized	4
5. Set the Date & Venue	4
6. Set your Fundraising Goal & Budget.....	5
7. Licenses	5
Gaming Activities	5
Special Event Permit (SEP)	5
8. Donations & Tax Receipts	6
Tax Receipting Guidelines	6
Tax Receipting Auction Items.....	6
9. Recruit Volunteers	7
10. Use of KGH Foundation Name & Logo	7
11. Promote Your Event	7
12. After the Event.....	7
How to submit your event proceeds	7
Contact.....	7

APPENDIXES

Appendix A – Community Fundraising Event Application	9
Appendix B – Pledge Form.....	13

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.

Our vision: **World class healthcare at home.**

This vision describes the Foundation’s hope that world class healthcare is not the purview of large cities alone. That through innovation, technology, and commitment world class healthcare can be made available to everyone wherever they may call home

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. 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 **Advanced Stroke Care**. For residents in communities across the BC interior, access to advanced stroke care often means transportation to Vancouver or Calgary. But when every moment matters, this delay can have devastating consequences. That’s why KGH Foundation is raising \$8 million as part of a revolutionary plan to centralize stroke care, right here at KGH. Patients from BC’s interior will no longer have to risk their health outcome due to unnecessary travel time. Together, we will reduce the devastating impact of stroke. For more information about Advanced stroke care, please visit our [website](#).

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
- JoeAnna’s House
- Rehabilitation Services
- 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 kgfoundation.com or call 250-862-4438.

STEP-BY-STEP GUIDE

1. Reach out!

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 Community Fundraising Event (CFE) 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.

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.

- General Donations
- Ticket Sales
- Auction items (live or silent)
- Online Registration
- Food and Beverage Sales
- Pledges
- Sponsorship
- Online peer-to-peer fundraising

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 Event Permit (SEP)

- Special Event Permits (SEP) are available to event hosts who wish to provide temporary or infrequent liquor service at events such as family gatherings, private functions, community festivals and manufacturer tastings.
- If you want to serve or sell liquor in a public space that is not licensed, please ensure you apply for the permit at least 2 weeks prior to your event.
- For more information or to apply: <https://specialevents.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.

a. Tax Receipting Guidelines

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.

Community 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 the link [here](#).

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.

b. Tax Receipting Auction Items

If you hold an auction and wish to offer tax receipts we would ask that someone from our Foundation attend your event so we can provide support and collateral to you as necessary. The CRA regulations for providing tax receipts for items bought at an auction are as follows:

- The fair market value of the item must be established and made known to all bidders in advance of the auction, or you cannot issue a receipt.
- The winning bid must meet the intention to make a gift threshold (the posted value of the item cannot exceed 80% of the winning bid).

We would recommend you include the following information wherever you intend to post the auction item FMV information (perhaps on a sign next to the item itself or in a program of auction items):

Official tax receipts may be issued for the purchase of an auction item as long as the winning bid meets the intention to make a gift threshold.

*The minimum bid that is required to meet the **intention to make a gift threshold** is determined by multiplying the fair market value of the item by 125%. Tax receipts will be issued for the eligible amount equal to the winning bid amount less FMV.*

Receipting for items donated for an auction:

- A receipt can be issued to the donor for the fair market value of the item at the time it is donated to the charity.
- The donated item may be subject to the deemed fair market value rule.
- If the fair market value of the donated item cannot be established, you cannot issue a receipt.

Receipting for items bought at an auction:

- The fair market value of the item must be established and made known to all bidders in advance of the auction, or you cannot issue a receipt.
- The winning bid must meet the intention to make a gift threshold (the posted value of the item cannot exceed 80% of the winning bid).

For a full detail of information about receipt for auction items, visit the link [here](#).

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.

Although we wish we could help and participate in all events supporting our hospitals, we have limited resources and staff. As a result, we are often unable to provide volunteers or a staff representative for most events. However, we would be happy to discuss the scope and needs of your event and help or participate if we can.

Please let us know if you require any collateral (eg, rack cards, banners etc.) to help support your fundraising efforts. Based on availability, we can sometimes lend out our KGH Foundation tent.

10. Use of KGH Foundation Name & Logos

Once you have completed your Community 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.

12. After the Event

Congratulations – you did it! Now it’s time to count and submit the funds you raised to the KGH Foundation. 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.

a. How should you submit your event proceeds?

Event organizers must submit their money within 30 days of their event. Donations should be submitted in the form of one cheque, made payable to ‘KGH Foundation’. Cash can be collected and exchanged for a bank cheque made payable to KGH Foundation.

Remember, if you had guests who donated \$20+ and are requesting a tax-receipt, please ensure their donation is made directly to the KGH Foundation and their full name and mailing address has been captured. For more information on donations and tax-receipting, please refer to page 6.

b. Contact

As always, please don’t hesitate to reach out at any time before, during or after your event. It is our goal to provide as much support to you as possible, to ensure a seamless process for you.

If you can’t find the answer to what you’re looking for, please don’t hesitate to call me at 250-862-4300 or send me an email at bettina.muller@interiorhealth.ca - we’re always here to help.

APPENDIXES

Appendix A – Community 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

Appendix A

2021 (CFE) COMMUNITY FUNDRAISING EVENTS APPLICATION FORM

1. PRIMARY CONTACT INFORMATION:

First Name: _____ Last Name: _____

Business/Organization Name: *(only list if your event is connected to a business/organization):*

If applicable, please select the category that best describes your business/organization:

- Corporation School Community Service Club Other _____

Please provide your preferred mailing address:

Street Address: _____

City: _____ Postal code: _____

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

Email: _____

The preferred mailing address listed above is for: My home The business/organization

2. EVENT INFORMATION:

Name of Event: _____

Type of Event: One-Time Ongoing *(consecutive days)* Annual/Re-occurring

Date(s) of Event: _____ Time of Event: _____

Location of Event: _____

Briefly provide any additional event details (eg, what inspired you to host the event?)

3. FUNDRAISING INFORMATION

How will you raise funds for your event? *(Select all that apply. We'll send more information your way to help guide you through this process!)*

- Auction items (live or silent) Ticket Sales Online Registration
 General Donations F&B sales Online peer-to-peer fundraising
 Gaming *(Raffle, 50.50, Bingo etc.)* Other: _____

Fundraising Goal:

- \$100 - \$499 \$499 - \$999 \$1,000 + Other \$ _____

I would like to have the event proceeds support:

- Advanced Stroke Care JoeAnna's House Area of greatest need
 Other _____

Date contribution to the KGH Foundation is expected? _____
(should be within 30 days of your event)

Donors that raise over \$500+ are recognized in KGH Foundation publications. Please confirm how you or your business/organization would like to be recognized:

Recognition Name: _____

- I wish to remain anonymous in KGH Foundation publications*

HELPFUL TIP:

- If you are the organizer of the event and are collecting funds from other donors, the event name will be the recognition name.
- If you are donating directly to the KGH Foundation, you can list your name as the recognition name

4. COMMUNITY FUNDRAISING EVENT POLICIES

Thank-you for your interest in supporting the KGH Foundation! Once the event has been officially approved, a signed copy of the attached agreement form will be forwarded to you.

PLEASE NOTE:

- The community fundraising events application must be approved by the KGH Foundation prior to you publicizing or holding the event.
- 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.

CRA regulations require charities to issue official receipts only in the name of the true donor. As I am submitting event proceeds on behalf of others, I understand that I am not eligible for tax-receipts (unless I or my organization make a personal gift to the KGH Foundation) *(required)*

I acknowledge that I have read and accept the fundraising terms and conditions as outlined on the following page (page 3). *(required)*

Signed: _____
Sponsor

Date: _____

Signed: _____
KGH Foundation

Date: _____

Please return completed form to:
Bettina Muller | Events and Projects Manager
2268 Pandosy Street, Kelowna BC, V1Y 1T2
P: 250-862-4300 ext 7152
E: Bettina.muller@interiorhealth.ca



KGH FOUNDATION COMMUNITY FUNDRAISING EVENT POLICIES

Community Fundraising Events are a very important component of the fundraising activities of the KGH Foundation. In order to ensure community 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. All materials featuring the name of the KGH Foundation and the KGH Foundation logo must be approved by the Foundation before publication.
3. 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.
 - a. Donors of your event are only eligible for a tax-receipt if they donate directly to the KGH Foundation.
 - b. Please note that official donation receipts cannot be issued for event registration/tickets, purchasing raffle tickets, merchandise, auction items or sponsorships.
4. 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.
5. In an effort to maintain transparency to our donors and supporters, we request that at a minimum, 50% of net proceeds should benefit the KGH Foundation.
 - a. In order to keep administrative costs down, we ask that money submitted be in the form of one cheque (with the exception of donations made directly to KGH Foundation).
 - b. If there are pledge forms to submit (for cash and/or credit card transactions) from your event, please attach one cheque for the overall balance along with the detailed pledge forms
6. 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, alcohol or cannabis
 - c. Vending machine sales
 - d. Directly soliciting funds door-to-door, or through telemarketing.
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. Community event 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 net 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.
- If the **SPONSOR** wishes to list the KGH Foundation as a partner on their website, in any media and/or printed materials, approval must first be provided by the KGH Foundation.
- 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.

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 (*please print clearly*)
- 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	

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