



Third Party Fund Raising Toolkit

St. Paul's Hospital Foundation (SPH Foundation) welcomes your fund raising efforts in support of St. Paul's Hospital.

Third party fund raising is defined as any event or initiative that is organized by an individual or organization, for the purpose of raising funds for a chosen charity with that charity's approval.

Thank you for your interest in helping us reach our goal to provide compassionate and holistic care for everyone who needs it.

Examples of Third Party Fund Raisers:

- Auctions (Silent or Live)
- Bake Sales, Craft Sales, BBQ's
- Pancake Breakfasts
- Sports Tournaments
- Dinner or Gala
- Steak nights

We ask all individuals and organizations to submit a Third-Party Fund Raiser Proposal & Agreement for approval prior to including St. Paul's Hospital Foundation as a beneficiary. This will help to clearly establish the parameters and expectations for all parties involved in the activity.

SPH Foundation actively encourages third party fund raising, however we must approve all initiatives in advance. This is an important safeguard in preserving the integrity of the name and reputation of the Foundation, as well as our commitment to our donors.

To assist you in presenting your third-party event to SPH Foundation, we have attached a Third-Party Proposal Form in this toolkit. This form should be submitted for approval no later than:

- 90 days prior to your fund raiser if you wish to have SPHF cooperatively involved (depending on the magnitude of your plans, and the involvement requested, the Foundation may be able to assist)
- 30 days prior to your fund raiser to obtain approval to add SPH Foundation as beneficiary.

We are grateful for your enthusiasm and look forward to learning more about your interest and how we might work together to connect our goals.

For more information, please contact:

Michelle Neufeld, Manager of Annual Giving
306-655-5835 or by email: michelle.neufeld@sphfoundation.org



PLANNING A SUCCESSFUL FUND RAISER

Planning a successful fund raiser takes time and organization. Depending on your idea, you may need to give yourself several months to plan before your scheduled deadline. Here are a few tips to help keep you on track!

- **Register your fund raiser with SPH Foundation:** Fill out the Third Party Proposal Form and Third Party Fund raiser Agreement and submit it to Michelle Neufeld, Manager of Annual Giving at St. Paul's Hospital Foundation. Phone: 306-655-5835 / Email: michelle.neufeld@sphfoundation.org
- **Form a Planning Committee:** Your committee members need to share the work and represent a variety of skills. Having a team will help you to brainstorm creative ideas and solutions to problems.
- **Develop a Task List:** Divide tasks among your committee and prepare a checklist of what needs to be done leading up to the day of the event.
- **Establish Goals/Create a Budget:** Identify your expected income and what your net will be after expenses.
- **Schedule the fund raiser:** Check to make sure there isn't a similar event being held at the same time.
- **Promotion and Publicity:** Consider how you will promote your event. Note that SPH Foundation may choose to help advertise your event on our website or on social media. Discuss your marketing plans with the Manager of Annual Giving to see if this is possible. If the Foundation chooses to market your event, you may be required to provide a logo, photos, posters and other materials in a timely fashion and at your own expense.
- **Promotional ideas:** Word of mouth, local media, community-based web sites, flyers, school and community groups, your event's social media, public bulletin boards, etc.
- **Wrap it up:** Your successful event is over and it's time to collect funds and thank your participants and volunteers. The Foundation asks that all funds be forwarded within 30 days following the event. Please allow 1-2 weeks from the date of funds received for tax receipts to be issued (refer to *Tax Receipt Guidelines*)



Tax Receipt Guidelines

St. Paul's Hospital Foundation follows strict guidelines on tax receipting as outlined by the Canada Revenue Agency. A few key points that you should be aware of are as follows:

- SPH Foundation is only permitted to issue tax receipts to individuals who make a donation without receiving a tangible item (i.e. Meals, Raffle's 50/50, etc.)
- SPH Foundation can only issue tax receipts for the amount of the actual donations received by the Foundation
- Tax receipts cannot be issued for funds used to cover the costs of the event or other administrative expenses incurred by the Third Party Organizer
- Tax receipts will be issued by the Foundation once net funds are received with a list of donor names, addresses and amounts of individual donations

For more information, visit the Canada Revenue Agency Website:
<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>



THIRD PARTY PROPOSAL FORM

To Benefit:

St. Paul's Hospital Foundation (Charitable Registration # BM 11919 5691 RR0001)

If you or your organization plans to host a fund raiser to benefit St. Paul's Hospital Foundation,
Please submit the completed proposal form no later than **30 days prior to your event**:

Michelle Neufeld, Manager of Annual Giving
St. Paul's Hospital Foundation, 1702 20th Street West
Phone: 306-655-5835 Toll Free: 1-888-345-0330
Email: michelle.neufeld@sphfoundation.org

SPONSOR INFORMATION (Please Type or Print)

Name/Organization _____

Contact Person _____

Street Address _____

City/Province/Postal Code _____

Business Phone _____ Home Phone _____ Cell Phone _____

Email Address _____

EVENT INFORMATION

Event Name _____

Event Date(s) & Time _____

Event Location _____

Is there an event website? (If yes, please specify) _____



Is this a first time event? Yes _____ No _____ (If no, please specify other event dates and amounts raised)

Please briefly describe your event (i.e. location, cost to participants, etc.)

Expected Number of Participants: _____

Target Audience for the Event: _____

How will you be promoting the event? _____

USE OF FUNDS

Will the proceeds from your event be donated only to St. Paul's Hospital Foundation? Yes _____ No _____

If no, what other charities will be involved and what percentage will be donated to the SPH Foundation?

FINANCIAL INFORMATION

How will funds be raised?

Pledges _____ Auction _____ Ticket Sales _____ Product Sales _____ Donations _____

Other (Please explain) _____

Gaming Events:

Raffle _____ 50/50 _____ Bingo _____

Please note: A gaming license is required by law. In Saskatchewan, you can obtain a license by contacting the Saskatchewan Liquor and Gaming Authority (SLGA).



Are you approaching sponsors for the event? Yes _____ No _____

If yes, please list any organizations you are planning to approach:

Will you require tax receipts for this event? Yes _____ No _____ (please refer to the tax receipt guidelines)

Note: Within 30 days after the last day of the fund raiser, please send your cheque or money order made payable to St. Paul's Hospital Foundation. If you want the funds to go to the Close to Home Campaign for Hospice and End-of-life Care, please write "Close to Home" in the memo.

SPH FOUNDATION AND YOUR EVENT

Note: SPH Foundation involvement in your fund raiser will be subject to availability and based on event specific details. We cannot guarantee that we will be able to provide assistance.

What are your expectations of the Foundation?

Requested Tasks? _____

Public Speaker: Yes _____ No _____ If Yes, provide details _____

Representation at Event: Yes _____ No _____ If yes, provide details _____

Will you require the St. Paul's Hospital Foundation logo for promotional use? Yes _____ No _____

If yes, please provide details on what types of materials will be used: _____

Note: Use of the SPH Foundation logo will need to be approved prior to using it on your promotional materials publicly. Contact the SPH Foundation to obtain approval.



Would you like your fund raiser to be listed on the Foundation's website and/or social media pages?
Yes _____ No _____ If yes, please provide a brief paragraph describing the fund raiser:

Note: Website and social media exposure will depend on timing of other content that we need to share and we cannot guarantee that your fund raiser will be posted.

Other Information the Foundation should know regarding your fund raiser:



THIRD PARTY FUND RAISING AGREEMENT

Please review and sign this form and submit it to St. Paul's Hospital Foundation along with your Third Party Proposal Form no later than **30 days prior** to your planned fund raiser.

You may email a scanned copy to michelle.neufeld@sphfoundation.org or send it to the Foundation office at 1702 20th Street West, Saskatoon SK, S7M 0Z9

The sponsoring organization or individual agrees:

1. To submit all copies for advertisements, point of purchase materials, and other project-related promotional materials to St. Paul's Hospital Foundation office and to obtain the Foundation's written permission before production or use. The Foundation expressly reserves the right to final approval on all St. Paul's Hospital Foundation promotional materials.
2. To use only the authorized name and logo of St. Paul's Hospital Foundation in all media and printed materials relating to the fund raiser; and strictly according to the SPHF visual identity guidelines.
3. To underwrite all costs of the fund raiser or to secure such underwriting. No costs shall be incurred by St. Paul's Hospital Foundation unless otherwise agreed to in writing.
4. To handle all monetary transactions for the fund raiser unless otherwise agreed to in writing.
5. To use its own mailing list for the fund raiser unless otherwise agreed to in writing.

I have read the agreement and fully understand all its terms:

Signature of contact _____ Date _____

Print Name of contact _____

For St. Paul's Hospital Foundation Office Use Only:

Date Application Received _____

Approved Yes _____ No _____

SPHF Staff Signature _____