



THIRD PARTY FUNDRAISING EVENT GUIDELINES

Thank you for your interest in raising funds to support the Toronto East General Hospital. At TEGH the words *"Above all, we care"* are more than just our motto, they form the foundation of everything we do. Your association helps us to build on this and achieve our mission. On behalf of the patients, families, staff and physicians that benefit from your support and goodwill, we thank you.

Every event, big or small, makes a big difference in the lives of our patients. Each year we have a number of special events so that we can raise funds to help support the Hospital's priority needs. Many of these events are hosted by individuals or organizations who want to make a special contribution to their community hospital. Community events are a great way for an individual, group or organization to raise money to support Toronto East General Hospital Foundation.

For approved community events/promotions, the Third Party Event Organizer(s) ("Event Organizer(s)") and the Foundation are required to adhere to the following guidelines:

Foundation Approval Process

The Foundation and Event Organizer(s) will ensure that fundraising events do not proceed without prior approval of the Foundation's Event Proposal Form, any contractual agreement required by the Foundation and execution of this Guideline by the Event Organizer and the Foundation. Contracts between the Foundation and the Event Organizer will reflect the requirements and principles in this Guideline.

Liability and Accountability

The Event Organizer(s) will:

- Provide a record of revenues and expenses, and copies of all receipts to the Foundation
- Provide periodic status updates to the Foundation on an agreed-upon basis
- The Foundation will not be responsible for any financial losses or unsettled accounts of the Event Organizer or fundraising event.
- The Foundation will be advised if the event is to benefit other charitable organizations, who these are, and what percentage of the final net revenue they will receive
- The Foundation will be provided with reasonable prior notice of any third party event
- cancellation
- No oral or written commitments will be entered into by the Event Organizer on behalf of or
- in the name of the Foundation
- All contracts of the Event Organizer relating to the Foundation must be submitted to the
- Foundation for review and approval prior to signing

Financing

In accordance with the Foundation's legal obligations to comply with Canada Customs Revenue Agency guidelines, the Foundation will not underwrite any third party event



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Insurance

- The Foundation will not provide insurance coverage for any third party events
- The Foundation will not assume any legal or financial responsibility relating to the fundraising event or Event Organizer
- The Foundation is not responsible for any damage, theft or accidents to individuals or property

Licenses and Fees

- Third party events involving licenses and fees will abide with all government regulations and applicable laws. Adequate time must be given to the Foundation to review all applications.
- The Event Organizer(s) will pay for all applicable licensing and/or permit fees and costs.

Product Endorsement

The Foundation does not normally endorse products. However, if the Foundation approves a fundraising event involving the sale of a product, the relationship between the Foundation and the product must be clearly defined to the public. Signage, hand tags, labels and or display materials must state the following:

“(Event Name) is pleased to support Toronto East General Hospital Foundation. A portion of the proceeds from the sale of this product will benefit Toronto East General Hospital.”

Event Promotion and Solicitation

- The Foundation will have final, signed approval on ALL promotional materials including brochures, flyers, advertisements, publicity and/or media communications relating to its participation in the fundraising event
- The Event Organizer(s) is responsible for making all media contacts and must ensure that it is clear that the Foundation is not the organization requesting medial coverage and/or participation
- The Foundation will, at its discretion and depending on supplies and reasonable requirements, provide existing in-house promotional materials
- The Foundation will not provide any donor contact lists
- All sponsorship solicitation lists must be reviewed and approved by the Foundation

Use of the Foundation Name and Logo

- The Foundation will, in its discretion and upon prior written approval, allow the use of its name and logo by the Event Organizer(s) to promote the event.
- Any use of the logo must be approved, in writing, prior to its use
- The Foundation reserves the right to withdraw the use of its name at any time and will not assume any costs or liabilities that may be involved in doing so

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Post-Event Financial Summary

Within 30 days after the Event, the attached report must be submitted to the Foundation together with the Net Revenue raised

Tax Receipts

- The Foundation will issue tax receipts in accordance with CRA regulations
- Receipts cannot be issued by the Foundation for proceeds of an event; receipts are issued only for direct donations where the donor receives no benefit for the contribution
- Documentation to support tax receipting for donations must be provided to the Foundation within 30 days of the event
- Event Organizer(s) must provide a complete and legible list of donors to the Foundation which includes:
 - First and last name with address, including city and postal code
 - Amount given and amount tax receipt to be issued for
 - List and value of any benefits received for donation
 - Any other information reasonably required by the Foundation
- The Foundation will issue tax receipts to individual donors and business acknowledgement letters to organizations that make donations to the event
- Tax receipts will only be issued by the Foundation for cash donations of \$20.00 or greater
- Sales of raffle tickets, admission tickets, green fees, auction items and other goods that provide a benefit to donors are not eligible for a tax receipt from the Foundation, except when an admission fee exceeds the Fair Market Value (FMV) of the benefits received.
- A tax receipt may be available for a portion of the admission price if a ticket or entrance fee exceeds the Fair Market Value (FMV) of the benefits received. This must be discussed and approved by the Foundation well in advance of the event date.
- A tax receipt cannot be issued for services by the Foundation including personal, professional or legal services
- The Foundation will issue a business acknowledgement letter to event sponsors.
- A gift of property other than cash is referred to as a “gift-in-kind.” The Foundation will issue a gift-in-kind charitable donation receipt to individuals and a business acknowledgement letter to businesses provided that the Event Organizer(s) supplies adequate documentation to verify the Fair Market Value of the item(s) donated. At the discretion of the Foundation, items of little value will not qualify as a gift-in-kind.
- Fair Market Value will be established by providing the Foundation with:
 - A purchase invoice or other proof of purchase of the item
 - An independent third party appraisal and value of the item. All costs of appraisal are borne by the Event Organizer(s).
 - A current price list for the item at a recognized commercial enterprise operating independently of the donor
- Individuals who request charitable tax receipts for Gifts in Kind will also have to complete the CRA three year holding declaration.
- The total amount of receiptable donations the Foundation is able to receipt for an event cannot exceed the total Net Revenue that the Foundation receives from the event



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Sponsorship

- The Foundation will have final, signed approval of event sponsors
- The Foundation will not solicit sponsors on behalf of the Event Organizer(s), nor will it provide contacts for sponsorship
- Any third party contacting potential sponsors must disclose the nature of the third party arrangement and must position the Foundation as a recipient of the event proceeds, not the host or sponsor of the event.

Staffing

- The Event Organizer(s) will provide all staffing for the event unless otherwise agreed in a contract with the Foundation
- The Foundation will not guarantee staff representatives to attend or participate in the event

Privacy

The Foundation is committed to adhering to the requirements of the Federal Privacy legislation (PIPEDA) and requires that these requirements be adhered to by the Event Organizer(s) and associated employees, contractors, agents and volunteers.

All information obtained and used by the Foundation will be treated with the utmost confidentiality and security in accordance with Foundation policies.

I have read, understand and agree to be bound by the Events Guidelines as identified above.

Authorized Signature of Event Organizer _____ Date: _____

Authorized Signature of the Foundation _____ Date: _____



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Below we have outlined some guidelines to help make your fundraising experience as easy and enjoyable as possible.

GUIDELINES AND HELPFUL TIPS

- Please fill out a Third Party Fundraising Event application form and submit to the TEGH Foundation 825 Coxwell Ave, Toronto, ON M4C 3E7.
- Form a committee to help you plan your event
- Plan well ahead to give yourself time to reach your goals
- Be sure you have chosen the right event for your audience and the time availability of your group
- Set your budget. If you are doing a large event with many attendees you may need to open a bank account.
- Schedule the event
- Promote your event – in certain cases The Foundation may be able to help with this
- Collect the funds – we ask that all funds be forwarded to The Foundation within 90 of your event. Please allow four weeks from that date for tax receipt to be issued (see information regarding receipting, some proceeds from your event are non-receiptable.)
- Thank you, thank you – please acknowledge everyone who participated in or supported your event and let them know how much you appreciate their help. They would also be proud to hear how much money was raised.

Special events are the responsibility of the third party but we are available for questions and guidance.