



Saint Elizabeth  
Foundation

# Third Party Fundraising Guidelines

## **Saint Elizabeth Foundation**

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## What is Third Party Fundraising?

Thank you for taking the initiative to be a leader in your community and raise funds for the Saint Elizabeth Foundation! We are happy you have decided to partner with us.

It is people like you that help to make the communities we serve strong and vibrant. Whether you are an SE Health staff member, Foundation Ambassador, volunteer, grateful patient or family member, your support will have a meaningful impact.

“Third party fundraising” at the Foundation is an event or activity organized by an individual, company or community supporter that is not an official Saint Elizabeth Foundation event but benefits the work, people and patients supported and cared for through our charitable programs and services.

Acting independently and with Saint Elizabeth Foundation’s approval, third party events are an important resource for raising funds to help us continue providing important programs and services in the community.

When you organize a third-party event, you’re not only raising money to support Saint Elizabeth Foundation – you are also raising awareness about us and the important work we do.

**Thank you for your commitment and partnership!**

## Getting Started

This set of guidelines is intended to help you get started on the right foot with your fundraising efforts. We’ve packed it with lots of valuable tips to help your event be successful from event ideas and promotional strategies to steps to securing donations for your event.

Additionally, we’ve included important procedures and guidelines to take into consideration when planning your activity. As we are mandated to adhere to Canada Revenue Agency’s operating and legal standards we kindly ask you to read this package carefully and contact us with any questions.

Finally, as a third party fundraiser, we ask that you fill out the **Third Party Fundraising Application Form**, which you will receive upon contacting the Foundation.

## Ideas for a FUN Fundraiser

Want to raise funds for Saint Elizabeth but don’t know how? No sweat! The following list of easy-to-do activities will help you generate ideas (and money!) in no time flat. Please keep in mind all events, activities, and promotions must be aligned with the Foundation’s mission, vision, values, and privacy policy.

Some ideas for you to consider include:

### Quick & Easy Ideas

- Jar Guess Games (candy, coins, jelly-beans, chocolates, etc.)
- Coffee Break
- Donations in lieu of birthday, wedding, or other celebration gifts
- Book sale
- Car wash
- Flower or plant sale

### Ideas Requiring More Planning

- Movie Night
- Pizza Fridays
- Yard sale
- Bingo Night
- Participation-A-Thons (running, walking, cycling, bowling, swimming, etc.)\*
- Holiday candy-grams (Valentine’s Day, Halloween, Christmas, etc.)

\*Please note Saint Elizabeth Foundation has existing infrastructure for a walk-a-thon/charity walk through the annual Saint Elizabeth Walk. We would be happy to work with you and your group to create a custom web link, QR code for donations and assistive materials including, but not limited to: donation solicitation email templates, thank you letters, etc.

## Creating a Budget

Working with a budget will ensure you keep your expenses in check and fundraising goals on track. It will give you a valuable bird’s eye view of the cash flow of your event and help you identify where you can look into getting supplies or services donated.

An important note: When holding a fundraising event for the Foundation, you must submit your budget to us if you require any tax receipts.

Please feel free to get in touch with us and our team can help you to understand what types of donations we can offer tax receipts for under the Canada Revenue Agency guidelines.

## Have a Plan

The success of your fundraising event hinges on having a good plan. The following tips will help you start your planning off on the right foot. Keep the following in mind:

**Audience:** Who are you trying to attract to your event? When you know your target audience you can customize the details, logistics and promotion of your event to best suit this audience.

**Test Your Idea:** Brainstorm with your potential audience, friends, family and colleagues on your fundraising ideas. Is this something that they would likely attend/or give to?

**Keep It Simple:** Don't start with a blank page if you don't have to. Find resources on the Internet, at the library or speak to people who have hosted a similar event in the past. We may be able to connect you with some helpful resources as well. You will gain a wealth of valuable information on what works and what doesn't to help you run a successful event.

**Build Your Team:** Working with a team of people will make life easier. Ask friends, family and colleagues to help plan your event. Make sure everyone knows and understands their role and responsibilities and stay in close communication so everyone is on the same page.

**Set a Goal:** Set a realistic fundraising goal to motivate your team and supporters. Having a clear goal gives everyone something exciting to work towards and can encourage supporters to be more generous.

**Keep Your Costs Low:** Try to keep expenses to a minimum so you can retain the highest percentage of proceeds for donation. Consider locating in-kind donations.

**Don't Over-commit:** Build your confidence and experience gradually by hosting a small event at first and working your way up to larger ones. Be sure to give yourself plenty of time to organize and execute your event. Keep in mind as well that events typically do better in their second or third year.

**Timing is Everything:** Look into whether there are any competing local events for the date and time you have chosen. You may also increase your event's appeal by having it coincide with special holidays like St. Patrick's Day, Family Day, Valentine's Day, Canada Day, etc.

**Have a Plan B:** Make sure you have a contingency plan, especially if your event is dependent on unpredictable factors like the weather.

## We're Here For You

We are so grateful that you have chosen to fundraise on behalf of Saint Elizabeth Foundation and help us to achieve our mission. Your work in the community is important and valuable to us and we are here to help you be successful! Though our resources limit the depth of assistance we can provide, we are more than happy to guide and support you where possible in your fundraising efforts along the way.

### We are here to help you in the following ways:

- Help you brainstorm event ideas
- Provide support, resources and helpful templates
- Coordinate approval of name and logo use for your promotions
- Promote your third party activity through our various marketing mediums and social networks
- Attend your event on behalf of Saint Elizabeth (based on scheduling and/or availability)
- Issue tax receipts (if applicable)

### However, there are some services we are not able to provide:

- Guarantee attendance at events
- Apply for gaming permits or raffle/liquor licenses
- Provide event, volunteer and/or liability insurance
- Provide patient, staff, donor or sponsor e/mail lists
- Provide financial support for event administration, including covering costs or managing the event budget

If you need further support in organizing your fundraiser or require any clarification please call us at **905.968.6516** or email **foundation@sehc.com**.

## Promoting Your Event

One of the most important keys to the success of your fundraising event is getting the word out. Here are some ideas to create a buzz for your event through word-of-mouth, emails, posters, flyers, online and media activities.

**Start Early:** Depending on the scale of your event, you need at least two weeks to advertise your event. Letting people know about your event well in advance gives them time to coordinate their schedules and pass the word on to their own networks.

**Posters and Flyers:** Feel free to design your own poster, or ask us for a template that can be used. If you are designing your own poster or flyer please send it to us for approval prior to circulating. Be sure to include all of the important details of your event, for example how the event will be donating to the Foundation. (E.g. Are all the proceeds of the event after costs being donated? Is 10% of an item sale being donated?) Put up your posters where your audience is: at work, sports facilities, community centres, schools, colleges, libraries or stores. Remember to ask first before you post!

**Online Promotion:** Social media sites like Facebook and Instagram, email and text messaging are free and effective ways to spread the word about your event. Ask your contacts to forward the details of your fundraiser on to their friends and family. Look into local online event calendars such as municipal, community centre and community news websites and ask if they will accept a posting for your event. You may also contact us at [foundation@sehc.com](mailto:foundation@sehc.com) and we can help you promote your fundraiser through our various social mediums.

**Word-of-Mouth:** Often times a personal connection can make the difference. Tell people about your event in person and have them tell their friends as well.

**Media:** If you're planning a larger scale event, you may want to consider sending a press release to local newspapers, radio and TV stations. Ask if they might be interested in doing a story in advance or sending someone to cover your event or take photos. If you are sending a press release, please give our team a chance to review it before sending if you're going to be using our name. The local media loves local news! If a reporter contacts you, give them details about your event and why you're doing it. If the reporter has questions about Saint Elizabeth Foundation, please refer them to us directly at [foundation@sehc.com](mailto:foundation@sehc.com) or **905.968.6516**.

## Fundraising Guidelines

We appreciate your generosity and enthusiasm to organize a fundraiser to benefit Saint Elizabeth Foundation. We also appreciate that your initiative will require your time, energy and personal resources, which is why we ask you kindly to review our Fundraising Guidelines listed below to understand your responsibilities and to ensure that your idea meets our community fundraising criteria.

### Saint Elizabeth Name & Logo for Promotional Purposes

- Permission must be given by Saint Elizabeth Foundation to use its name/logo and associated brands (E.g. SE Health) for the purpose of your fundraiser or promotion. All promotional material must be approved prior to live distribution. A copy of our logo(s) will be provided via email upon approval of your event.
- Use of our logo on promotional materials does not imply that the fundraiser is sponsored or co-sponsored by SE Health or the Foundation. The Foundation is involved only as a beneficiary.

### Handling Your Events Proceeds

- All fundraisers must include a budget detailing projected revenue, expenses and donation(s) to the Foundation.
- The Foundation will not incur any costs or financial liability associated with third party events. The budget and its related expenses are the responsibility of the third party organizer.
- As per the Associated Fundraising Professionals Code of Ethics "taking commission, for any purpose, on funds raised as part of a third-party event is prohibited."
- It is advisable to assign someone to be responsible for handling donations at your event. Never leave your collections unattended. We recommend seeing if there may be a cash lockbox available to you.
- It is a good idea to record all monies collected on a summary sheet and to use this record when conducting a final count of all donations received.

### Donations & Tax Receipting

- The Foundation issues official income tax receipts in accordance with the guidelines set by the Canada Revenue Agency.
- The Foundation will not provide individual tax receipts for event-based fundraisers or product sales (E.g. dinners, golf tournaments, ticket sales, attendance fee, donating part of the proceeds from a new book or an item in your store, etc.).



## **Donations & Tax Receipting Continued**

- The Foundation will only issue tax receipts for monetary donations (of \$20 or more) if we receive an amount equal to or greater than the total amount to be receipted. For example, if you are requesting tax receipts in the amount of \$500 for donors you have recorded, the Foundation must receive \$500 or more. The third party organizer must maintain complete donor records in order for a tax receipt to be issued. The Foundation will either mail or email receipts to the donors listed.
- Advertised proceeds from the event must be submitted to the Foundation along with the name of the third party fundraiser and any requested designation of funds (E.g. Journey Home Hospice, volunteer program, etc.). Donations can be made by cheque (payable to Saint Elizabeth Foundation) or by Visa or MasterCard by calling 905.968.6516 or visiting [foundation.sehc.com](http://foundation.sehc.com). The Foundation expects third party fundraisers to exercise transparent financial controls, and funds raised must be submitted within two weeks of the closure of the event.