



## QEII Foundation Community Fundraising Guidelines

A community initiative is a third party fundraising activity organized and managed by an individual, group or organization in support of the QEII Foundation. These activities differ in size and scope but the common theme remains the same - the opportunity to connect with the community in support of the QEII. Often these activities are led by grateful patients who received exemplary care or by their enthusiastic family members. Together, these events raise tens of thousands of dollars each year.

Thank you for choosing the QEII Foundation as the beneficiary of your fundraising event or activity. The Foundation greatly appreciates support from community initiatives. The QEII Foundation raises funds to support all areas of the QEII Health Sciences Centre. When you raise funds for the QEII Health Sciences Centre, you are helping to purchase and upgrade vital medical equipment, support programs and services, and expand and improve facilities. Please read the following prior to registering your fundraising event with us.

Mailing address:

QEII Foundation

PO Box 9000, 1276 South Park St.

Room 1-040, Centennial Building

Halifax, NS B3H 2Y9

Tel. (902) 473-3325

Toll free: 1-888-428-0220

Fax. (902) 473-7491

[www.qe2foundation.ca](http://www.qe2foundation.ca)

Charitable Business: 88646 3496 RR0001

**1. Use of the QEII Foundation name and logo** - we will be proud to have our logo and name displayed on your event materials. To ensure our identity is represented correctly, all drafts and final copies of all promotional material - posters, tickets, pledge forms and any other printed, video or web-based material, must be approved by the QEII Foundation prior to production and distribution, and prior to the event. Our logo can be emailed to you upon request. Please allow up to one week for approval

**2. Proceeds** - an event that donates a portion of its sales/proceeds must state in its promotions exactly how much of the proceeds are being donated, either in a percentage or specific dollar amount (e.g. 10% of the proceeds, or \$1 from every sale).

**3. Accounting** - the organizer of the event agrees to handle all monetary transactions for the event and to present the proceeds, in the form of a single cheque, to the QEII Foundation within 30 days of the event, or as agreed to in writing at the time of event approval. Funds delivered to the Foundation shall be counted in advance and the accounting shall show a break down by source of the funds (e.g. Registration: \$\$\$, Auction: \$\$\$, Donations: \$\$\$ etc.)

**4. Sponsorship** - Please check with the QEII Foundation before approaching any individuals or companies or organizations for sponsorship or donations for your event. The QEII Foundation may have already approached that individual or company for a sponsorship or donation or another community group may already be approaching them for a similar request. The QEII Foundation needs to ensure that potential sponsors or donors do not receive multiple requests for sponsorship of events on our behalf.

**5. Use of Name** - the Foundation reserves the right to withdraw the use of its name at any time and will not assume costs that may be involved in doing so.

**6. Cancellation** - should the event be cancelled, the event organizer agrees to contact the Foundation at least one week before the event.

**7. Liability** - the Foundation will not assume any legal or financial liability, and the Foundation is not responsible for any damages or accidents to person or property.

**8. Restrictions** - the QEII Foundation does not participate in door-to-door fundraising initiatives and will not approve proposals containing any such solicitation. The QEII Foundation does not trade, sell or exchange in any way, databases or lists of donor information. The QEII Foundation cannot provide public relations or media support outside of listing the event on the Foundation website, nor can it guarantee media attendance at your event.

#### **How the QEII Foundation can work with you: what we can provide as assistance**

- Advice and expertise on event planning.
- Review prospects and potential sponsor/supplier lists to check for conflicts with other planned solicitations.
- Promote your event on our online Events Calendar at [www.qe2foundation.ca](http://www.qe2foundation.ca) as well as in our internal publications (date sensitive).
- Write an endorsement letter that validates the authenticity of your event and organizers for one year.
- Review all promotional materials being used for your event including, but not limited to, advertising, letters, brochures, flyers and press releases prior to production or distribution.
- Approve the use of the QEII Foundation name and/or logo, as appropriate. Permission to use the QEII Foundation name and/or logo must be authorized in writing by the Foundation.
- If there will be any gaming at your event, such as raffles, 50/50, bingo, the QEII Foundation will be happy to assist you with obtaining the required permits.

- Assist your event by confirming a QEII Foundation representative to attend your event and/or speak at your event when possible. Please provide a complimentary ticket or admission for a Foundation staff person to attend your event.
- Receive contributions and arrange for charitable tax receipts for cash donations and gift-in-kind donations following the event.
- Prepare and mail thank you letters accompanied with tax receipts.

**The QEII Foundation is unable to provide the following:**

- Funding or reimbursement for event expenses, or cover any costs related to the event.
- Share mailing lists of donors or contacts.
- Promote or advertise your event (with the exception of a notice on our website and reference in our internal publications).
- Assume responsibility of any nature or kind associated directly or indirectly with the event. Event organizers must arrange their own liability insurance.
- Guarantee attendance of staff or volunteers at your event.
- Provide prizes, auction items, awards or celebrities or VIPs to attend events.
- Issue tax receipts for registration, sponsorship, and certain kinds of gift-in-kind donations such as services, gift certificates, and use of vacation property. (See below for rules regarding receiptable gift-in-kind donations)
- Prepare and mail sponsor solicitation to organizations or businesses.
- Prepare and mail thank you letters to those who do not receive a tax receipt.
- Provide promotional materials

**What is a gift?**

A gift is described by CRA as a 'voluntary transfer of property – usually cash, without expectation of return.

No consideration, that is, no benefit of any kind, to the donor or to anyone designated by the donor, may result from the gift.

**Guidelines for Income Tax Receipts and Gift in Kind Donations**

The QEII Foundation adheres to all Canada Revenue Agency (CRA) guidelines in order for the QEII Foundation to protect our charitable status and continue to support the QEII Health Sciences Centre.

Tax receipts can be issued to those individuals or organizations who make a gift. For larger scale fundraising events, such as gala dinners, CRA may allow a tax receipt for the entry fee less the "advantage" the participant has received. This is dependent on the ratio of the fee to the advantage. The QEII Foundation will work with you, when applicable, to determine the eligible tax receipt amount for your event based on CRA guidelines. A complete final budget must be submitted to determine the viability of receipting in these circumstances.

**We can issue tax receipts for:**

- Donations made to the QEII Foundation for \$10.00 or more in the calendar year they are received. If you require a tax receipt to be issued to participants in your event, we ask that you

include the QEII Foundation's charitable business number (88646 3496 RR0001) on all your publicity materials and that you state "tax receipts will be issued for donations of \$10 or more upon request".

- Gift-in-kind donations for prizes or products. To process gift-in-kind donations, the QEII Foundation requires a written invoice or other supporting document such as a store receipt that clearly indicates the fair market value less any taxes paid of the in-kind donation. For gift-in-kind donations of artwork, an independent, external appraisal is required to determine fair market value at the time of the donation. (For more information, please refer to the QEII Foundation's Gift-in-Kind Policy.)
- In order for the QEII Foundation to process a tax receipt, send a thank you letter, or letter of acknowledgement, complete donor name and mailing information (including postal code) must accompany the donation that is to be receipted and/or acknowledged.

**What we cannot issue tax receipts for:**

- Ticket purchases for event admission
- Payment to participate in an activity such as golf
- Purchase of auction items or raffle items
- Sponsorships
- Businesses that agree to sponsor an event will receive a business receipt and a thank-you letter from the QEII Foundation that would enable them to claim back the full amount of their sponsorship as an expense.
- Donations of services or gift certificates from business owners
- Coin box collections, staff lotteries
- Community or company fundraising events – auctions, raffles, bake sales, CD sales, car washes, etc. An individual or corporation cannot receive a donation receipt for money that was not donated by them (i.e. an individual cannot be designated to receive the donation receipt for monies raised through a casual day event).