



COMMUNITY PARTNER FUNDRAISING INITIATIVE GUIDE

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What is a Community Partner Fundraising Initiative?

A Community Partner Fundraising Initiative is a fundraising/promotional activity that is not affiliated with the Foundation. The Foundation is not active in the planning or implementation, does not incur any costs or liabilities for the initiative and has little to no staff involvement. Although we actively encourage Community Partner fundraising, all such initiatives must be approved in advance by the Bowmanville Hospital Foundation.

The Foundation recognizes and appreciates the significant contributions of community organizers who hold initiatives on its behalf. They help to not only generate revenue for the Bowmanville Hospital Foundation but also to raise public awareness of the role the Hospital and Foundation plays in Bowmanville and the surrounding communities.

The Bowmanville Hospital Foundation is the fundraising arm for Bowmanville Hospital.

The Foundation raises and stewards funds for equipment and capital projects for the Hospital. All funds raised to benefit the Hospital must be directed to the Bowmanville Hospital Foundation.

Examples of Community Partner Fundraising Initiatives

Community Partner Fundraising Initiatives can include, but are not limited to such activities as:

- Golf Tournaments
- Fashion Shows
- Game Nights
- Concerts
- Trivia Nights
- Competitions or Recreational Activities where participants solicit pledges, “a-thons” (i.e. walk, bike, bowl, yoga, skate, dance)
- Barbeques
- Local Talent Nights
- Spa Parties
- Matching Gift Program
- Dress Down Day
- Employee Payroll Deductions
- Donation Box
- Page

Notify Us

Once you have selected the Initiative you wish to host, the next step is to notify the Bowmanville Hospital Foundation of your intent to fundraise. We ask that you do so by filling out the **Community Partner Initiative Agreement form**, available for download at www.bowHF.com. Please allow two weeks for the Foundation Office to review and respond to your proposal.

Please forward the completed form to Caitie Lehman, Development Coordinator:

By email to: calehman@lh.ca

By mail: Bowmanville Hospital Foundation
47 Liberty Street South
Bowmanville, ON L1C 2N4
(905) 623-3331 ext. 21855

YOUR 6 STEP ACTION PLAN

The #1 reason people say they don't give - They were never asked!

1 - PLAN

- What type of initiative are you interested in?
- Form a planning committee, start building support for your activity by including family and friends in the planning process.
- Set your fundraising goal.

2 - COORDINATE

- Choose a date for your activity and a venue if applicable.
- Register your event with the Bowmanville Hospital Foundation.
- Prepare and submit a budget (see our budget template).
- Prepare an event checklist to keep you on track.
- Foundation available for guidance and support.

3 - ADVERTISE

- Promote your event using: flyers, posters, and social media.
- Include the Foundation logo in your promotional materials.
- We'll post the activity on our website calendar of events.

4 - FUNDRAISE

- Ask family, friends, colleagues for support.
- Make the ask through your social media networks.

5 - SAY THANK YOU

- Don't forget to say Thank You to your planning committee.
- Thank those who participated and/or attended.
- And finally, thank those who donated.

6 - POST EVENT WRAP UP

- Invoices/payments.
- Submit final budget to the Foundation.
- Submit proceeds to the Foundation within 30 days.
- Tax receipts if applicable - speak to the Foundation prior to the activity.
- Evaluate the initiative with your committee.
- Start planning for next year!

What the Foundation Can Provide

- Offer the use the Bowmanville Hospital Foundation's name and logo. We require written authorization of all materials that use the Foundation brand, name or logo prior to usage.
- Provide Foundation education and promotional materials (brochures, fact sheets etc.)
- Promote the initiative throughout the Hospital and to donors/volunteers/stakeholders as appropriate.
- Provide a letter of support to be used to validate the authenticity of the initiative and the organizers.
- Provide guidance and support for planning/management.
- Ensure that the Community Partner organizers and the Foundation understand and agree upon their respective roles in the planning and conduct of the initiative.
- Ensure funds generated by your Community Partner activities are disbursed in a manner that reflects the needs of Bowmanville Hospital and Foundation's accountability to its donors and supporters.
- Provide tax receipts for donations to the activity.

What the Foundation Cannot Provide

- Reimbursement for expenses.
- Share mailing lists of Foundation donors/volunteers/stakeholders.
- Guarantee staff, volunteer or local media attendance at the event.
- Issue charitable tax receipts to sponsors. (see Tax Receipting Guidelines)

Community Partner Fundraising Initiative Policies

In order to ensure Community Partner Fundraising Initiatives have a positive impact on the Bowmanville Hospital Foundation's public image, the following requirements must be met by those groups or individuals wishing to conduct an event that benefits the Foundation.

1. Organizer(s) wishing to hold a fundraising activity to benefit the Foundation are required to complete a Community Partner Agreement Form prior to organizing the activity. Each request is carefully reviewed to see if it is feasible and fits the Foundation's mission, vision and goals. The Foundation will notify the applicant(s) of the proposal's status within 5-10 business days.
2. The Foundation will not incur any costs or liabilities associated with Community Partner Initiatives. The organizer(s) must obtain all necessary permits, licenses, and insurance relating to the event. The organizer(s) will provide the Foundation with copies of the above, at least 2 (two) weeks before the event start date.
3. All staff and volunteers for the Community Partner activity will be provided by the organizer(s).
4. In accordance with the Personal Information Protection and Electronic Documents Act (Canada) ("PIPEDA"), the Income Tax Act (Canada) ("ITA") and common law, as well as Hospital and Foundation privacy policies, the Foundation does not release its donor/ mailing list for any purpose.
5. The Foundation will **not solicit** participation from its donors/volunteers/ stakeholders beyond notifying them of event details. Where appropriate, the Foundation may connect donors with a similar interest to the Initiative.
6. All advertisements and other related promotional materials which use the Foundation's name and or logo must be approved by the Foundation prior to use.
7. Recognition for the organizing group/individual's donation to the Foundation will be in accordance with the Foundation's Donor Recognition Guidelines.
8. The organizer(s) acknowledge the Foundation adheres to the receipting policies set out by the Canada Revenue Agency. The organizer(s) cannot claim to issue charitable tax receipts for any donation or item without speaking with the Foundation Office prior to organizing the initiative.
9. Organizer(s) are prohibited from setting up a bank account which includes any aspect of the Foundation's name in conjunction with a fundraising activity.
10. Within 30 days after the last day of the event, the organizer(s) must arrange for the presentation of a cheque made payable to the Bowmanville Hospital Foundation. No tax receipts will be issued until the funds have been received by the Foundation and the correct contact information provided.
11. The Bowmanville Hospital Foundation has a fiduciary responsibility to ensure the Hospital/ Foundation's name is being used properly, that funds are being collected in a manner that is consistent with our mission and public image.
12. The logos of the Bowmanville Hospital Foundation or any campaign related materials cannot be reproduced without permission.

Tips for Organizing a Successful Activity

1. Start brainstorming and planning for the activity well in advance of the anticipated date. Be creative and have fun.
2. Decide on the type of initiative. Evaluate based on criteria such as the complexity of hosting the activity, number of people required to organize the activity, target market, community appeal, etc.
- 3. Discuss the Community Partner Fundraising Initiative idea with the Foundation Office.**
4. Anticipate possible problems and address them early in the planning. Design an alternative plan in case of unforeseen circumstances.
5. Prepare a realistic budget. Decide on the admission fee, etc. Forward the budget to the Foundation. Review the budget frequently.
6. Decide the date, time and location. Consider other activities etc. that might be taking place during the same time period.
7. Create a detailed timeline and review it frequently.
8. Check into insurance requirements and arrange to get insurance, licenses and permits well ahead of the activity.
9. If 'key' individuals are to participate in the initiative (speakers, performers, caterers, etc.), research and confirm their availability for the dates that have been chosen. Obtain written contracts.
10. Make a list of tangible items (tables, linens, sports equipment) that will be needed. Decide where they will be bought/rented/borrowed from and who will arrange to buy/pick-up/return them. (see Event Concept Template)
11. Create a list of possible communications to help promote your activity. Enlist the help of creative people who can assist with designing brochure/poster and other P/R material. The sooner the activity is advertised, the better the chance for success.
12. Get the local media involved in helping to promote the activity.
13. Confirm with 'key' individuals, venue etc. by phone a week to 10 (ten) days prior to the activity.
14. Make sure 'day-of' event volunteers know what they are supposed to do. Delegate.
15. Keep good notes of what has been accomplished and what still needs to be done.
16. Ensure that there is enough petty cash to accommodate the needs of the activity.
17. Enjoy the activity!
18. Applaud and thank everyone for a job well done.

THANK YOU FOR YOUR SUPPORT!

Thank you again for your interest in planning an initiative to benefit the Bowmanville Hospital Foundation. Philanthropic contributions such as yours are instrumental and help us meet the health care needs of members of our communities.



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