



## INTRODUCTION

First and foremost, we wish to thank you for your interest in supporting **St. Mary's Hospital Foundation (SMHF)** by planning a community event! St. Mary's Hospital Foundation relies on the support of individuals like you who want to make a meaningful difference in your community.

Without community initiatives, we would not be able to fund programs, equipment and research that allows St. Mary's to provide compassionate, patient-centered care to everyone who walks through our doors. We recognize the great effort it takes to organize and execute an event successfully and our professional team is here to provide assistance along each step of your fundraising journey.

St. Mary's Hospital Foundation has established important guidelines to help your special event or promotion run smoothly. We ask that you read these guidelines carefully before proceeding with your plan. Approval will be granted on a per event/promotion basis. Applicants must reapply annually for approval.

## GETTING STARTED!

Please follow the steps below in planning your community event:

1. Carefully read through this toolkit and each of its sections.
2. Complete and submit the **Event Application Form** to us at least 30 days prior to your event. Please give us up to 2 weeks and a member of our team will get in touch with you to review your plans and answer any questions.
3. Once your event is approved, please read and sign our **Community Events Terms & Conditions**.
4. Please make yourself familiar with our **Tax Receipting Guide** (this is very important information for your donors).
- 5. HOLD YOUR EVENT!**
6. Once your event is completed, submit your **Financial Summary Form** and the funds you raised for the Foundation **no later than 30 days after your event**.

## THIS TOOLKIT

This handbook toolkit is designed to help you organize a successful and enjoyable event and comes with helpful tools, policies and guidelines.

To help ensure the best possible results please contact our Event Coordinator to help get you on your way:


Valerie Sinel  
Graphic Designer & Events Coordinator  
valerie.sinel.comtl@ssss.gouv.qc.ca  
514-345-3511 x5880

St. Mary's Hospital Foundation  
3830 Lacombe Ave., Suite 1510  
Montréal, QC, Canada H3T 1M5

## WHAT IS A COMMUNITY EVENT?

A community event is fundraiser that is organized by an “event organizer” – an individual, affiliated group or organization, for the purpose of raising funds for — or on behalf of — a chosen charity with that charity’s approval.

St. Mary’s benefits from community events by:

-  Raising awareness
-  Receiving financial support from event net revenues for programs and research initiatives

## ST. MARY’S HOSPITAL FOUNDATION

### Our Mission

To encourage and inspire the active personal involvement of our community, to support and promote the identified priorities of St. Mary’s Hospital Centre as it strives to provide Healthcare on a Human Scale.

### Our Foundation

St. Mary’s Hospital Foundation is a charitable organization that was formed in 1973 with the primary objective to support St. Mary’s Hospital Centre so that it can uphold the highest level of patient and family-centered healthcare to the community.

The community is our cornerstone. The unfaltering support from our donors is our inspiration.

St. Mary’s donors come from every corner of the city and every walk of life. Some give because they were patients and appreciate the quality of the care – Some give because they know someone who has benefited from services – And others understand the importance and necessity of a community hospital.

The Foundation manages and stewards funds to support programs, projects and healthcare professionals for the advancement of our patient care, research and teaching; all to provide Healthcare on a Human Scale at St. Mary’s Hospital.

## HOW WE CAN SUPPORT YOUR COMMUNITY EVENT

St. Mary's Hospital Foundation **CAN**:

- ✓ Offer you an endorsement letter that confirms you are raising money on our behalf.
- ✓ Offer you an online fundraising page and/or electronic donation form for your event.
- ✓ Offer you advice on how to organize your event. We are happy to help guide your fundraising initiative by discussing your ideas with you. Feel free to direct any questions about the community event application process to us.
- ✓ Help you promote your event by posting on our social media platforms (Instagram and Facebook).
- ✓ Send a SMHF representative to attend your event, if available.
- ✓ Loan you SMHF marketing materials such as signage. (Please give us notice of 30 days prior to the event to account for shipping time.)
- ✓ Provide you with carbon copy temporary donation receipts should you be collecting donations by credit card. (These must be completely filled out with the yellow carbon copy going to the donor and the white copy back to SMHF).
- ✓ Issue tax receipts for your donors if applicable, subject to Canada Revenue Guidelines and when requested in advance.
- ✓ Authorize the use of our name and logo at your fundraising event for SMHF (with permission).

St. Mary's Hospital Foundation **CANNOT**:

- ✗ Fund or reimburse any event expenses.
- ✗ Provide SMHF donor or sponsor lists.
- ✗ Guarantee attendance of staff or volunteers at your event.
- ✗ Solicit individuals or companies to acquire donations or sponsorship for auctions or raffles.
- ✗ Apply for gaming licenses or permits (e.g. bingos, raffles, liquor, and insurance) for your event.
- ✗ Provide tax receipts for cash or gift-in-kind goods that were not directly received by the SMHF office (please also see our [Tax Receipting Guide](#)).
- ✗ Endorse programs that raise money on commission or events that involve the promotion or support of a political party or candidate, or those that appear to endorse a political activity.



Thank you for your support of **St. Mary's Hospital Foundation (SMHF)** through your involvement and planning of a community event fundraiser.

Please complete this form at least **30 days** prior to your event to the best of your abilities.

Then sign and return to:

Valerie Sinel  
Graphic Designer & Events Coordinator  
valerie.sinel.comtl@ssss.gouv.qc.ca  
514-345-3511 x5880

St. Mary's Hospital Foundation  
3830 Lacombe Ave., Suite 1510  
Montréal, QC, Canada H3T 1M5



**This application must be approved by SMHF prior to publicizing your community event in support of St. Mary's Hospital Foundation.**

## 1. ORGANIZER INFORMATION

Contact Name: \_\_\_\_\_

Group/Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_

Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

## 2. EVENT INFORMATION

Event Name: \_\_\_\_\_

Event Date/Time: \_\_\_\_\_

Event Location: \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_

Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Estimated number of participants: \_\_\_\_\_

Is this the first time you've held this event?  Yes  No  Do not know

Will this be an annual event?  Yes  No  Do not know

What area of the Hospital would you like to support? (Greatest needs or specific department)

### **3. EVENT DESCRIPTION**

Briefly describe the event or promotion and how the funds will be raised.

### **4. FUNDRAISING GOAL**

### **5. PROPOSED BUDGET**

Please provide a budget of planned expenses and revenues related to the event as well as the means by which you will transfer the proceeds to SMHF.

## 6. PROMOTION

Do you require use of SMHF's name and/or logo for promotional use?

No     Yes – If so, how?

Do you require an online fundraising tool/form to collect donations for your event?

No     Yes

Do you require SMHF promotional materials for your event?

No     Yes – If so, what?

How will you promote your event and how will you use these resources?

## 7. PLEASE SIGN & DATE

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Signature(s) of Organizer(s)

Date



Thank you for your support of St. Mary's Hospital Foundation through your involvement and planning of a community event. You, the business/organization/individual(s) are hereafter referred to as the **event organizer** and we, St. Mary's Hospital Foundation are hereafter referred to as **SMHF**.

By signing this form, you agree and understand that:

- 🕒 You have met in person or online with us to discuss details of the event, signed, and submitted an **Event Registration Form** at least 30 days prior to an event.
- 🕒 All costs associated with the fundraising event will be the sole responsibility of the event organizer.
- 🕒 You have read and understand the **Tax Receipting Guide**.
- 🕒 Any use of our name, logo, or stationary in all publicity (including media releases, print/promotional materials, social media, mailings, advertising etc.) for the proposed event must be approved by us prior to being printed, released, etc.
- 🕒 Please consult us for how to best align your event with our mission. Generally, the approved wording is *"Proceeds from this event will be donated to the St. Mary's Hospital Foundation."*
- 🕒 We cannot guarantee staff or volunteer support to community events. SMHF staff will receive complimentary tickets or admission when invited to speak or attend a community event.
- 🕒 We reserve the right at any time and for any reason to request that the event organizer cease use of our name in connection with the event and you agree to comply with such a request.
- 🕒 All fundraising must be done for the exclusive benefit of SMHF. Any variance must be approved by us in advance of the event. We must be notified if other organizations will co-benefit from the event.
- 🕒 SMHF does not release volunteer, partner or donor names under any circumstances and cross-solicitation of current SMHF donors is prohibited. Please specify you are soliciting for a specific community event.
- 🕒 All event organizers are responsible for providing insurance as required by law, or established business practice.
- 🕒 We cannot assume any legal or financial liability of a community event. SMHF is not responsible for any damage, accidents to persons or property at a community event or any actions in association with the event.

- 🔗 Community events will maintain the highest ethical standards as held by SMHF in promoting a family oriented and healthy community.
- 🔗 All proposals for cause-related marketing must be accompanied by a full business plan.
- 🔗 Your event proceeds must be communicated to us within fourteen (14) days of the event. All pledge forms, cheques, money orders and cash along with a list of all donors and their complete contact information will be provided to SMHF within thirty (30) days of the event.
- 🔗 Whenever possible, we would appreciate written event information and/or photographs that may be included in SMHF's publications.

I individually, or as a representative of the below named business, organization or group agree to the above requirements and hereby fully release and agree to hold harmless SMHF and any other affiliates, their Officers, Directors, Trustees, agents, employees and representatives, successors and entities, together with their insurers, of and from any and all liability, claims, damages, expenses, injury or causes of action for any reason.

Event Name & Date: \_\_\_\_\_

\_\_\_\_\_  
Name(s) of Organizer(s)

\_\_\_\_\_  
Signature(s) of Organizer(s) Date

\_\_\_\_\_  
Signature of SMHF Representative Date

Please complete, sign and return this form to: Valerie Sinel, Graphic Designer & Events Coordinator  
valerie.sinel.comtl@ssss.gouv.qc.ca 514-345-3511 x5880



It is very important that event organizers understand the rules about tax receipting before planning your event. Tax receipting can be complicated and requires some planning but we can help you understand how they apply to you, your donors and the Foundation. Please confirm your tax receipting plan and procedures with your SMHF representative before relaying it to your event participants and donors. It is the event planner's responsibility to communicate guidelines around tax receipting to participants. SMHF adheres to the Canada Revenue Agency (CRA) Income Tax Act.

**Please read through the below information and if you have any questions please ask your SMHF Representative.**

Please note that official tax receipts for the year of your event can only be issued if all donations and information is received by December 31 of that year.

Official receipts will be issued by the foundation office upon receipt of:

- 🔗 The full donation amount
- 🔗 Full name and address of the donor/organization
- 🔗 Complete supporting documentation

*Note: The total value of issued receipts cannot exceed the net proceeds of the event. This includes gift in-kind receipts. Event expenses may not be extracted from tax-receiptable donations. All donations requiring a tax receipt must be received in full.*

Please let us know 4 weeks in advance of your event if tax receipting is required. Tax receipts will only be issued after the event has taken place and only after the donation amount is received by SMHF. To provide donations for your donors please use our **Manual Donation Form** at the end of this document or another way to record the full contact information for the individuals/and or businesses that require a tax receipt. Please submit this form along with the donations and **Financial Summary Form** below to SMHF, where they will be processed and a tax receipt will be mailed directly to the donor. Official tax-deductible receipts will be issued for the following

## **TAX RECEIPTING FOR INDIVIDUAL DONORS**

SMHF will issue an official tax-deductible receipt for the following:

- 🔗 Monetary donations from an individual in the form of a cheque, cash, or credit card donation for \$20 or more. Online donation receipts are processed instantly and at any amount.
- 🔗 The donation portion of the ticket price for a fundraising event. CRA allows receipts to be issued for the donation portion of a ticket price according to the split receipting method.
  - Event organizers must determine the fair market value (FMV) of the advantage portion of the ticket price and have it approved by the Foundation prior to the event.

- In order to issue a receipt, the FMV of the advantage cannot be more than 80% of the gift itself, otherwise known as the intention to make a gift threshold.
- 🕒 Auction bids above 25% more than an item's stated FMV is eligible for a tax receipt for the difference between the bid price and the stated FMV.
- 🕒 Tax receipts will only be issued if no goods or services were received in return for that donation such as purchase of draw tickets, event admission tickets, registration fees, etc.

Receipts will not be issued to individuals for:

- 🕒 Donated items for which the market value cannot be determined
- 🕒 Event or administrative expenses such as the purchase of merchandise, auction items, etc.
- 🕒 Donation of old clothes, used furniture, etc.

## **TAX RECEIPTING FOR BUSINESS**

SMHF will issue an official tax-deductible receipt for the following:

- 🕒 Monetary donations from an organization when no value is received by that organization in way of marketing exposure, tickets, or sponsorship
- 🕒 Gift-in-kind donations less than \$1,000 must be accompanied by proof of FMV such as a receipt of payment or invoice and must be approved by the Foundation prior to the event
- 🕒 Gift-in-kind donations greater than \$1,000 without proof of FMV (artwork, for example) must be accompanied by a documented professional appraisal and must be approved by the Foundation prior to the event
- 🕒 Donations of inventory as long as an appropriate invoice is provided

**Businesses may choose to claim sponsorships as an advertising expense. Acknowledgement receipts can be used to write off contributions to reduce taxable profits at the end of the year. Acknowledgement receipts will be issued for funds provided as sponsorship support for a fundraising event, upon request.**

Receipts will not be issued to individuals for:

- 🕒 Donation of services including personal, professional or legal services. (Printing, event planning, photography, website design etc. are not eligible for a tax receipt)
- 🕒 Donation of items with an advertising component
- 🕒 Donated items for which the market value cannot be determined
- 🕒 Event or administrative expenses such as the purchase of merchandise, auction items, etc.

St. Mary's Hospital Foundation's Charitable Business Number is 11918 9108 RR0001

**For more information on tax receipting policies of the Canada Revenue Agency (CRA), please visit:**  
<https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/issuing-receipts/fundraising-events-issuing-receipts.html>



Thank you for supporting St. Mary's Hospital Foundation! Once you have finished your event, please complete the form below and attach all raised funds for submission.

 **Please complete and submit this form no later than 30 days after your event. Contact us to arrange a drop-off of the funds raised.**

Event Name: \_\_\_\_\_

Event Organizer: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Phone

Email

<b>NET REVENUE SUMMARY</b>	
Cash / Cheque Donation (receiptable)	\$ _____
Non-receiptable Donations (e.g., ticket sales, auction, raffle)	+ \$ _____
<i>Subtotal</i>	\$ _____
Total Expenses	- \$ _____
<b>NET REVENUE</b>	<b>\$ _____</b>
<b>NOTE:</b> All event expenses must either be paid directly by the organizer or come out of the event proceeds.	

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Sponsor's Name (please print)	Address	City/Province	Postal Code	Email	Telephone	Receipt? (Y/N)	Cash/Cheque / Credit Card	Amount
Thankyou McThankyouparts	125 Thankyou Street	Thankyouville, QC	A1B 2C3	thankyou@email.com	514-123-4567	Y	Cash	\$20
1.								
2.								
3.								
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10.								
11.								
12.								
13.								
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17.								
18.								
19.								
20.								

Thank you for your generous support! A tax-deductible receipt will follow in the mail.