Make your contribution go even further

PLAN A COMMUNITY INITIATIVE
Welcome to the Calgary Health Trust Community Initiative Planning Toolkit!

Are you grateful for health care in our city and looking for a way to give back? Do you have a creative fundraising idea, but need a little extra help getting your ideas off the ground? Are you a budding event planner looking for a great organization to donate to?

You have come to the right place! This planning toolkit is a one-stop shop for you to get from start to finish planning and executing a great event in support of Calgary Health Trust, taking health care from good to great.

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Who is Calgary Health Trust & where does your money go?

Together with our donors and partners, Calgary Health Trust raises money for health care - taking it from good to great. Health care serves people we care about in many important ways:

- Those who urgently need to get better: **acute care**
- Those who need to stay well: **prevention and harm reduction**
- Those living with chronic pain: **clinic and outpatient care**
- Those at the end of their life: **palliative care**

12 Carewest centres

400+ community programs

When you donate to a site, you are contributing to the excellence they are striving to achieve in health care every day.

WHETHER YOU MAKE A GIFT

YOU MAKE A DIFFERENCE EVERY DAY

DONORS LIKE YOU are taking health care from GOOD TO GREAT
What is a community initiative?

Calgary Health Trust relies on the enthusiasm of many individuals and organizations that generously initiate activities and special events to raise money in support of health care. Use your energy, creativity and enthusiasm to organize a fundraising event for your family, friends, co-workers and the community.

GET STARTED!
How to start your relationship with Calgary Health Trust

1) Please read through the Community Initiative Toolkit package, fill out the application form and send it to community.initiatives@calgaryhealthtrust.ca

2) A Calgary Health Trust staff member will get in touch with you and make sure we have all the information we need for your event to be successful.

3) Once your initiative is approved, you will gain access to resources such as poster templates, pledge forms and more! We can also provide you with a fundraising page on our website that you can use to promote your fundraiser and collect donations through peer-to-peer fundraising.

After he was diagnosed with cancer, Mike Metcalfe's friends and family started the Mike Metcalfe 30 Hour Soccer Marathon for Cancer. During its 10 year run, this inspiring fundraiser brought in over $529,400 to purchase equipment for cancer treatment.
How can Calgary Health Trust help you with your initiative?

(minimum three weeks’ notice required)

**Calgary Health Trust can:**
- Post your event/initiative on our website.
- Use our website for registration, pledges and creation of personal fundraising pages.
- Provide select Calgary Health Trust promotional items (pending availability).
- Approve the use of the Calgary Health Trust name/logo. Note: use of Calgary Health Trust’s name or logo must be approved in advance prior to printing or publishing event materials.
- Identify priority funding options for the use of your proceeds.
- Provide a letter of endorsement to share with potential sponsors, contributors, and partners.
- Provide samples, templates, and ideas to help make your event a success.
- Provide tax receipts for donations made to your event (please check in advance for any terms and conditions that may apply).

**Calgary Health Trust cannot:**
- Provide staff or volunteers to participate in the organization and running of your event.
- Apply for, obtain, or provide raffle and lottery licenses, permits, or liability insurance.
- Provide lists of our donors, sponsors, media partners, vendors, or volunteers.
- Host or hold fundraising or media events at Alberta Health Services facilities.
- Manage or assist with your event finances, ticket sales, raffles, or auctions.
- Provide debit/credit card machines on the day of your event.
- Issue press releases.
GET ORGANIZED!
Community Initiative Planning Checklist

- **Brainstorm** - Chat with friends and colleagues to develop an idea for an event that excites you. See page 7 for some fundraising ideas.

- **Develop a Plan** - Map your chart to financial success. Use our event proposal form as a guide to help you plan the initial details of your event. Remember: the lower your costs, the larger your contribution.

- **Submit a Community Initiative Proposal Form** - Fill out the attached form and send it in to Calgary Health Trust or fill in the form online at calgaryhealthtrust.ca

- **Speak with us** - After we review your proposal form, we will schedule a time to discuss the details of your events and how we can help you.

- **Form a Committee and Logistics Team** - It takes a lot of time and energy to plan a great fundraiser. Recruit enthusiastic and dedicated volunteers with a variety of skills to divide the tasks and help with attention to detail.

- **Promotion** - Before you start your promotions, you need to decide who your target audience is. From there, you can create eye-catching flyers, invitations and other promotional materials. See page 8 for some ideas on how to promote your event using Calgary Health Trust templates.

- **Collect Funds** - Make sure there are proper controls and procedures in place to account for the funds you are collecting and that someone is responsible for managing this important area. To find out more about Tax Receipting Guidelines visit www.cra-arc.gc.ca/charitiesandgiving/

- **Say Thank You** - This is the most important step: let those who attended your event know how much money they helped raise and how it will impact health care in our community. We can help you with that.

- **Evaluate** - You can learn a lot from your successes and evaluate opportunity for growth. If you plan to run the event next year, plan a debrief meeting the following week with your committee.

Contact us at community.initiatives@calgaryhealthtrust.ca or call 403-943-0615.
GET INSPIRED!
Fundraising ideas

• Sporting challenge (most effective of all): Pick an activity from your bucket list that you have always wanted to do, whether it’s climbing Mount Kilimanjaro or hosting a 30 hour hockey tournament, then ask your friends to sponsor you towards accomplishing your goal.

• Neighbourhood garage and/or bake sale: Ask all of your friends and neighbours to participate by donating items for sale. Make signs that indicate all proceeds are going towards your fundraiser. Add a bake sale, and have a donation jar visibly displayed.

• Benefit night: Throw a fundraising party at a local establishment and accept donations as an entrance fee. Also make sure to ask that local restaurant, ice cream parlour, etc. to support you with a donation of 10% (or more!) of the night’s sales. In the past, many local restaurants have supported this kind of initiative.

• Team car wash: Go to your local car wash and talk with the owner/manager about doing a fundraising event there. Many people go to the same car wash every week. Post flyers a week in advance, and then spend a few hours talking with people about what you are doing at the cashier stand. Hand people a flyer, accept donations. A perfect spring activity!

• Throw a potluck dinner party & sell 50/50 tickets: with 50% of the proceeds donated towards your fundraising goal.

• Cook-off: Have contestants pay a fee for entering their prized dishes. Have a panel of judges choose the best dish and the winner gets a prize.

• Executive auction: Ask your company’s executive staff to donate one hour for a fundraising auction. Have employees bid on each executive, with proceeds to benefit your efforts. The executive then takes over the highest-bidding employee’s job for the appointed hour.

• Karaoke night/competition: Find a karaoke machine and invite a bunch of friends over. Have funny prizes such as worst singer, best dressed, worst song choice, etc. Charge them to enter the competition.

• Hot lunch: Bring chili or a dish of your choice to work and charge colleagues $5 for a plate of homemade food.

• Wine and cheese night: Invite friends to come over with a bottle of their choice (helps to place a minimum value), provide the food and start the tasting. Ask for an entry donation fee and to add to the fun do a draw for one of the bottles.

Calgary’s Walk to Remember is an annual event established to honour the memory of the babies loved and dearly wanted gone too soon due to miscarriage, ectopic pregnancy, stillbirth or neonatal death. The event has raised over $27,000 for the Pregnancy and Infant Loss Program at Foothills Medical Centre.
GET NOTICED!
Let everyone know what you are up to

Keep everyone in the loop! Link to or add your page to our social media sites:

- On Twitter, tweet about your fundraising efforts and link to your fundraising page, then follow us @YYCHealthTrust. We love to be social and share the great work that our fundraisers are doing.

- On Facebook, share your fundraising page and then become a fan of YYCHealthTrust. We often put up images and posts relating to our events that you can share with your friends.

- On other social networking sites, talk about your fundraising efforts and link to your fundraising page.

- On Instagram, follow us @calgaryhealthtrust and tag us in the great photos you take while planning and executing your event.

- Use your blog. It’s a great place to update donors on your progress and a subtle way to tell blog visitors that you are accepting donations for a great cause. Be sure to add a widget or link to your fundraising page.

- Use our poster templates to promote your initiative. Determine where your target audience likes to hang out, and find out if you can put up posters there.

- If you would like us to create a web listing for your initiative, please provide the following information:
  - Your initiative/event’s name
  - The date/time/location
  - A short description of your initiative and what you are raising money for
  - Your logo or photos (if applicable)
  - Contact information for event organizers

What now?

Thanks for checking out our Community Initiative Planning Toolkit! Once you have filled out our proposal form and your initiative has been approved, please use the toolkit as a guide to help you plan a great event. We appreciate your enthusiasm and dedication to taking health care from good to great in our community. If you have any questions during this process, please contact us at community.initiatives@calgaryhealthtrust.ca or call 403-943-0615.

COMMUNITY INITIATIVE TOOLKIT
Community Initiative Proposal Form

Note: Application must be approved by Calgary Health Trust prior to promoting or hosting the event.

Today’s Date: __________________________________________________________________________________________________________

1. Your information:

Name of Group/Company Planning Community Initiative: ________________________________________________________________

Primary Contact: __________________________ Role: __________________________

Mailing Address: __________________________________________________________________________________________________________

City: __________________________ Postal Code: __________________________

Home Tel: __________________________ Business: __________________________ Cell: __________________________

E-mail Address: _________________________________________________________________________________________

2. Event/ Initiative information:

Name of Proposed Initiative: ________________________________________________________________

Start Date: __________________________ End Date: __________________________

Start Time: __________________________ End Time: __________________________

Name of Venue: __________________________________________________________________________________________________________

Location of Event: ________________________________________________________________________________________________________

Address: __________________________ Postal Code: __________________________

3. Briefly describe the event and how the funds will be raised.

________________________________________________________________________________________________________________

________________________________________________________________________________________________________________

________________________________________________________________________________________________________________

________________________________________________________________________________________________________________

4. How many people do you expect to attend the event? _________________

5. What is your expected net revenue for this event? $ ______________________

6. Do you understand that you are responsible for obtaining all related licenses and insurance? YES NO

7. Do you understand and agree that all event costs are to be covered by the event organizer and only proceeds are to be directed to the Calgary Health Trust? YES NO

8. Does the community group agree that the Calgary Health Trust will receive all revenues from the event within 30 days of the event? YES NO
9. Does the community group understand and agree that all publicity for the proposed event must be approved by Calgary Health Trust prior to being released, printed, etc.? (Calgary Health Trust will review within 5 business days of your submission.) YES  NO

10. Is the Community group planning to approach any of the following for promotional sponsorship?

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<td>Print (signage, flyers etc.)</td>
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11. Please indicate if you will require promotional materials for the event.

- Endorsement Letter: YES  NO
- Calgary Health Trust Brochures/Information: YES  NO

12. Would you like someone from Calgary Health Trust to speak at your event (pending availability)?  YES  NO

13. Calgary Health Trust raises money for health care across Calgary and designates funds to priority needs. Would you like to support Calgary Health Trust's greatest needs?

- YES  NO
  If no, where to? _____________________________________________________________

- If no, please indicate where: ______________________________________________

☐ I have read and understand the attached terms and conditions following this page.

Signature of Applicant: ___________________________ Date: ___________________________

Please Print Name: __________________________________________________________________

Please complete, sign and return the event proposal form to the address below.
Acknowledgement of your application will be forwarded to you as soon as possible.

Calgary Health Trust
800 -11012 Macleod Trail SE
Calgary, AB  T2J 6A5

Telephone: 403-943-0615  Fax: 403-943-0629  Email: community.initiatives@calgaryhealthtrust.ca
Visit calgaryhealthtrust.ca for more information. Your support is greatly appreciated.
CALGARY HEALTH TRUST COMMUNITY PARTNER FUNDRAISING EVENT

Terms and Conditions

All Event Organizers are required to complete the Partnership Fundraising Event Application and adhere to the Terms and Conditions of Calgary Health Trust’s Community Partnerships. Upon thorough review, please complete the application form included with this document and indicate that you have read and understand in full the terms and conditions.

1. All Events in support of Calgary Health Trust or any of its affiliated sites, projects and/or programs must be approved in advance, and Event Organizers must agree to the terms and conditions as laid out in this document.

2. The Event will be conducted in a safe manner and adhere to all federal, provincial, and municipal laws.

3. Calgary Health Trust accepts no legal responsibility and cannot be held liable for any risk or injury or other damages in conjunction with the Event and related fundraising activities.

4. The Event organizers will handle all monetary transactions and other record keeping for the Event and provide net proceeds to Calgary Health Trust within 30 days of the Event. NOTE: It is best practice to achieve net proceeds of at least 50% of the gross proceeds. The Calgary Health Trust strongly advises Event Organizers to work toward this goal as a minimum.

5. Calgary Health Trust is not responsible for any financial losses incurred as a result of the Event.

6. Calgary Health Trust may provide tax receipts for some Event proceeds, strictly adhering to Canada Revenue Agency guidelines in all cases. Receipting for Event donations MUST be confirmed with Calgary Health Trust in advance.

   a. Personal donations are eligible for a tax receipt when the following criteria are met:

      i. If a gift is made to Calgary Health Trust in the form of cash or a cheque

   ii. No goods or services were received in return for the gift. Purchase of draw tickets, event admission tickets, sponsorships, live and silent auction items are NOT eligible for tax receipts.

   b. Event Organizers must provide the name, address and phone number for each individual or corporation to be tax receipted as well as funds totaling exact amount to be receipted.

7. Calgary Health Trust respects your privacy. We do not rent, sell or trade our mailing lists. The information provided will be used to acknowledge and process donations, ticket purchase and sponsorship. It may also be used to inform you of our charitable work, funding needs and opportunities to volunteer or give. Community event organizers are also asked to adhere to this policy.

8. Event Organizers must adhere to Calgary Health Trust’s Confidentiality Agreement as it pertains to sensitive information that may be obtained in the planning of the Event and the use of donor and event participant information.

9. Illegal activities and those which do not align to health-conscious and charitable aspects of the brand will be grounds for termination by Calgary Health Trust of the agreement.

10. Calgary Health Trust allocates 5% of Event net revenue to Calgary Health Trust’s operational fund to support coverage of costs associated with processing, receipting, investment management, stewardship and granting of event donations and proceeds.

Calgary Health Trust retains the right to withdraw its approval and participation in a Community Partner Event if it deems that the above guidelines have not been adhered to.