

# Make your contribution go further

PLAN A COMMUNITY INITIATIVE





# Calgary Health Foundation 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 Foundation, taking health care from good to great.



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## Who is Calgary Health Foundation and where does your money go?

Together with our donors and partners, Calgary Health Foundation raises money for care, wellness and research - ensuring our community receives the best health care in the world - because our loved ones and yours deserve nothing less.

- **Care:** advancing opportunities at bedside for patients today
- **Wellness:** promoting health and preventing progress of illness and disease
- **Research:** better understanding disease and the precision needed to treat it

**12**  
**Carewest**  
**Sites**

**4**  
**Acute**  
**Care**

**400+**  
**Community**  
**Programs**

When you donate to you are contributing to the excellence we are striving to achieve in health care every day.



Peter Lougheed Centre

Rockyview General Hospital

Foothills Medical Centre

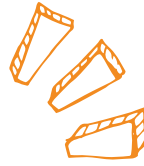
South Health Campus

### WHETHER YOU MAKE A GIFT



**3**





## What is a Community Initiative?

Calgary Health Foundation 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 Foundation

- 1) Please read through the Community Initiative Toolkit package, fill out the application form and for your event
- 2) A Calgary Health Trust staff member will get in touch with you and make sure we have all the information we need to be successful.
- 3) Once your initiative is approved, you will gain access to resources such as poster templates, pledge forms and more
- 4) 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**. This inspiring fundraiser helped to purchase equipment for cancer treatment.





## How can Calgary Health Foundation help you?

(minimum three weeks' notice required)



### Calgary Health Foundation can:

- Post your event/initiative on our website.
- Use our website for registration, pledges and creation of personal fundraising pages
- Provide select Calgary Health Foundation promotional items (pending availability)
- Approve the use of the Calgary Health Foundation name/logo. **Note:** use of Calgary Health Foundation 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 Foundation 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



☐ **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 Foundation at [calgaryhealthfoundation.ca](http://calgaryhealthfoundation.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 Foundation 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/](http://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@calgaryhealthfoundation.ca](mailto:community.initiatives@calgaryhealthfoundation.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 to your sale. Make signs that indicate all proceeds are for our fundraise. Add a bake sale and have items 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 going towards a donation jar. 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.



## 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 **@YYCCalgaryHealthFoundation**. 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 **YYCCalgaryHealthFoundation**. 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 at **CalgaryHealthFoundation** - 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 **at [communityinitatives@calgaryhealthfoundation.ca](mailto:communityinitatives@calgaryhealthfoundation.ca)** or call **403-943-0615**.



# Community Initiative Proposal Form

**Note: Application must be approved by Calgary Health Foundation prior to hosting the event.**

Today's Date: \_\_\_\_\_

## Your information:

Name of Group/Company Planning Community Initiative: \_\_\_\_\_

Primary Contact: \_\_\_\_\_ Role: \_\_\_\_\_

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

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Home Tel: \_\_\_\_\_ Business: \_\_\_\_\_ Cell: \_\_\_\_\_

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

## Event/ Initiative information:

Name of Proposed Initiative: \_\_\_\_\_

Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Name of Venue: \_\_\_\_\_

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

Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_

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

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**How many people do you expect to attend the event?** \_\_\_\_\_

**What is your expected net revenue for this event? \$** \_\_\_\_\_

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

**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 Foundation?** YES NO

**Does the community group agree that the Calgary Health Foundation will receive all revenues from the event within 30 days of the event?** YES NO

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

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

Newspaper YES NO

Radio YES NO

Television YES NO

Magazines YES NO

Posters YES NO

Print (signage, flyers etc.) YES NO

**Please indicate if you will require promotional materials for the event.**

Endorsement Letter: YES NO

Calgary Health Foundation Brochures/Information: YES NO

**Would you like someone from Calgary Health Foundation to speak at your event (pending availability)?** YES NO

**Calgary Health Foundation raises money for health care across Calgary and designates funds to priority needs.**

**Would you like to support Calgary Health Foundation'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 Foundation**

800 -11012 Macleod Trail SE

Calgary, AB T2J 6A5

**Telephone:** 403-943-0615 **Fax:** 403-943-0629

Email: [community.initiatives@calgaryhealthfoundation.ca](mailto:community.initiatives@calgaryhealthfoundation.ca)

Visit [calgaryhealthfoundation.ca](http://calgaryhealthfoundation.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 Foundation'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 Foundation 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 Foundation 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 Foundation 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 Foundation strongly advises Event Organizers to work toward this goal as a minimum.
5. Calgary Health Foundation is not responsible for any financial losses incurred as a result of the Event.
6. Calgary Health Foundation 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 Foundation 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 Foundation 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 Foundation 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 Foundation'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 Foundation of the agreement.
10. Calgary Health Foundation allocates 5% of Event net revenue to Calgary Health Foundation's operational fund to support coverage of costs associated with processing, receipting, investment management, stewardship and granting of event donations and proceeds.

Calgary Health Foundation 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.