



ROSS MEMORIAL
HOSPITAL
Foundation



Hosting an Event

A Planning Guide

Thank you for your interest in helping patients at Ross Memorial!

What you'll find in this booklet:

- 10 steps for event success
- How to submit an event proposal
- How the RMHF evaluates and processes event proposals
- Liabilities, changes & cancellation policies
- How to keep a donation records report
- The Third Party Event Proposal Form for signing and submitting

On behalf of the Ross Memorial Hospital Foundation, the hospital team and all of the patients who benefit from the involvement of local donors like you, thank you for your interest in hosting an event to benefit patients of the Ross Memorial Hospital.

This booklet has been designed to provide information to assist you in the planning of your event. If you have any questions after reviewing this material, please don't hesitate to contact our office.

Your decision to help will have a positive impact on our hospital, with support for the purchase of essential medical equipment or capital projects.

Supporting RMH through a gift to the Foundation won't just help someone you know or love get better—it has the potential to actually transform the care they receive, making sure they get the best care possible, using the most up-to-date technology and procedures, in a healing environment that's close to home.

Thank you again.

We're grateful for your commitment to the Ross Memorial Hospital Foundation and wish you every success with your fundraising activity!



RMH Foundation

Tel: 705-328-6146

Fax: 705-328-6147

foundation@rmh.org

10 Angeline St. North
Lindsay, ON K9V 4M8

10 Steps for Event Success

Whether your event is small or big, these ten steps will help you get started, and keep you motivated and well organized.

1. **Form an Event Committee**

Identify friends, family or colleagues who are enthusiastic, dedicated and have special skills that will help make your event a success. They can provide you with the support you need to organize and run your event.

2. **Develop your concept**

Let your imagination run wild! Brainstorm ideas that are fun, unique and will excite you about organizing this event.

3. **Choose your event**

From the list that you have developed, decide on what event most excites you and will appeal to your target audience.

4. **Establish a fundraising goal**

Set an attainable objective; prepare a budget with expected revenue and expenses. As a general rule of thumb, expenses should not exceed 50 per cent of your expected gross revenue.

5. **Submit your event**

Complete the Third Party Event Proposal Form and submit it to the Ross Memorial Hospital Foundation for approval.

6. **Organize your event details**

Organization is the key to any successful event planning. Make a list of all the day to day details and who is responsible for each task. Developing a timeline to follow can be an extremely helpful tool.

7. **Promote your event**

Think about how to spread the word about your event. You should design and create materials that will appeal to your target audience in order to generate excitement about your event.

8. **Have fun!**

Have fun planning and hosting your event. Remember, if you need guidance along the way, the staff at Ross Memorial Hospital Foundation is there for you.

9. **Wrap up**

Congratulate yourself and your committee on a job well done and for giving back to your hospital.

* Collect any outstanding funds raised from your event.

* Contact RMH Foundation to arrange a cheque presentation (this should be within 30 days).

10. **Thank you**

Thank everyone who supported you in your event, including donors, participants and sponsors.

It's important to submit your proposal to the RMHF. Here's why.

The RMH Foundation is fortunate to receive many inquiries and proposals from companies, individuals, families and staff groups that would like to support the hospital and its departments. If you would like to plan an event or program to benefit RMH, **you're required to submit a completed and signed EVENT PROPOSAL form** (pages 7/8 in this booklet). Depending on the complexity of the event, this form should be submitted at least two months prior to the event or program date. Each proposal is carefully reviewed to see if it is feasible and fits with our organization's goals and objectives.

The criteria used to evaluate proposed events:

- Does the event support the mission and image of the Ross Memorial Hospital & Foundation?
- Does the event have a realistic budget, timeline and plan?
- What are the estimated proceeds from the event?
- Who will chair the event? Will there be other committee members?
- Does the event honour an individual or mark a special occasion?
- Will the event raise funds for areas of priority as determined by the RMH leadership team or do you have a specific area in mind?

Please allow two weeks for the Foundation Office to review and respond to your proposal.

Please be aware of the following:

- The RMH Foundation does not advance funds, provide donor lists or solicit sponsorship revenue for third party fundraising events.
- We can provide limited support. Our department's ability to provide services for your event is limited by staff size and internal fundraising obligations. (We state this information in advance so that there are no disappointments or misunderstandings with regards to our ability to participate in and support your fundraising event.)
- The use of any Ross Memorial Hospital and Foundation brand, logo or name will require written authorization from the Foundation Office prior to usage.

Did you know?

Some local fundraising events have been so successful over the years, they've earned a place on the Foundation's Donor Wall. There are several donor walls at RMH. The plaques they display recognize donors (including individuals, groups, businesses and organizations that have reached the following levels:

Supporter - \$5000 Provider—\$10,000 Benefactor—\$20,000 Patron—\$50,000 Founder—\$100,000

If you'd like more information about our donor recognition programs, contact the Foundation office.

How event proposals are processed by the Ross Memorial Hospital Foundation

Third party fundraising events must fit the Ross Memorial Hospital Foundation mission and vision statements.

Foundation Mission: Inspire donor support for Ross Memorial Hospital and ensure gifts are used effectively and responsibly to improve local healthcare.

Foundation Vision:

Exceptional support for Exceptional Care

Permission

The Ross Memorial Hospital Foundation has a fiduciary responsibility to ensure that the Ross Memorial Hospital name is being used properly, that funds are being handled and accounted for in a responsible manner, and that fundraising is being conducted in a manner that is consistent with our mission and public image.

- All fundraising events require advance written permission from the Ross Memorial Hospital Foundation. Do not make public announcements or promote the event until you have received written approval of your event proposal.
- Fundraising events must comply with all relevant municipal, provincial and federal laws.

Event Timing

It is the policy of Ross Memorial Hospital Foundation to maintain a list of all events and other fundraising efforts benefiting the hospital. This includes all activities of the Ross Memorial Hospital Foundation office and events sponsored at-large by others in the community.

It is the responsibility of the event coordinator to approve the fundraising date with the Ross Memorial Hospital Foundation Office to ensure no conflict exists between events. There must be sufficient time between events to maximize support, enthusiasm and attendance for your event.

Event Promotion & Logo Usage

The Ross Memorial Hospital Foundation must review and approve all promotional materials (including without limitation press releases, public service announcements, scripts, posters, brochures) before they are used. We encourage you to promote your event through local media and posters or flyers.

The logos of Ross Memorial Hospital & Foundation cannot be reproduced without permission.

The Ross Memorial Hospital Foundation will assist if requested by promoting the event, when appropriate, through:

- Ross Memorial Hospital website: As a link to the event or organization's website can be requested
- Monday Report – an email newsletter to employees of the Ross Memorial Hospital
- Gratitude Report Newsletter (published three times per year)

Event Language

- Any promotional materials must expressly state that your event is raising funds to benefit the Ross Memorial Hospital and/or Foundation.

- Any promotional materials must properly characterize the use for which the donation will be made. For example, *“Proceeds benefit the purchase of high priority medical equipment for the Ross Memorial Hospital.”*

Financial Guidelines

- Event expenses should be less than 50% of the total amount raised, excluding in-kind donations.
- If event expenses are greater than the total collected, the group conducting the event is responsible for payment of these additional expenses.
- Within 30 days after the last day of the event, please arrange for the presentation of event proceeds. Cheques should be made payable to *Ross Memorial Hospital Foundation*.

Budget

- Establish an attainable objective, a useful rule of thumb: be conservative when estimating revenue. Before moving forward with the organization of an event it is important to outline what your costs will be. This will help you monitor your expenses. **Remember: the lower your costs, the greater your contribution will be.**

Sponsorship

- Ross Memorial Hospital Foundation cannot solicit sponsors for your fundraising event and will not provide any donor or patient family contact information. Please provide a list of the potential sponsors you intend to approach and the Foundation will provide guidance and/or advise of possible conflicts.
- Printed materials and other information should state, *“Proceeds will benefit the Ross Memorial Hospital and/or Foundation.”*

In-Kind Sponsorship

- In-kind sponsorship is defined as a donation of a product or service such as food, beverage, printing, or silent auction items.
- The Ross Memorial Hospital Foundation will not solicit in-kind sponsors for your fundraising event.
- In-kind sponsors should be acknowledged at the event or in follow-up.
- The value of in-kind donations from sponsors should not be included in your total event revenue.
- Consult with the Foundation in advance to determine whether in-kind sponsors will be eligible for receipts. The Canada Revenue Agency has specific rules that must be followed.
- In order to issue tax receipts to donors in a timely and accurate manner, we require a type written list of information. The Foundation has a template that will be provided.

Donation Records Report

You should create a spreadsheet that contains this information for sponsors, donors and in-kind sponsors. This spreadsheet must be turned in to the RMHF within 30 days of your event.

Sponsors & Donors:

- First/Last Name (Company/Org contact person)
- Company/Organization
- Address (City, Province, Postal Code)
- Phone Number
- Donation Amount

In-Kind Sponsors:

- First/Last Name (Company/Org contact person)
- Company/Organization
- Address (City, Province, Postal Code)
- Phone Number
- Donation Amount

Liability, Changes & Cancellation

Liability

- You agree to indemnify and hold harmless Ross Memorial Hospital and Foundation and all its officers, directors and employees from any and all claims and liabilities in any way related to the event.
- Fundraising events and program must comply with all relevant municipal, provincial and federal laws.
- Event organizers must discuss liability insurance coverage and waivers with the Ross Memorial Hospital Foundation prior to signing the Event Planning Form.

Changes

You must immediately advise Ross Memorial Hospital Foundation of any changes in your fundraising event.

Cancellation

There may be times when a fundraising event must be canceled. Ross Memorial Hospital and Foundation, through any of its directors, officers and senior administrators retains the right to cancel the fundraising event. You hereby agree to cancel the event, if so directed, and further agree to release Ross Hospital and Foundation and its officers, directors, and employees from any and all liability in connection with such action.

What the Ross Memorial Hospital Foundation Can Do For You

- Offer event planning expertise and advice.
- Acknowledge your direct contributions to Ross Memorial Hospital Foundation.
- Approve the use of the Ross Memorial Hospital and/or Foundation name and/or logos for your event.
- Provide a letter of support to validate the authenticity of the event and its organizers.
- Provide a limited number of materials for your event such as flyers, brochures, and a Foundation banner.
- Acknowledge your event by publishing the details, such as event name, event description, locations and contact information.
- Provide charitable tax receipts to attendees/participants as it fits within CRA charitable receipt guidelines.

Things to Remember

- Complete and sign the event proposal form, then return it to the Ross Memorial Hospital Foundation at least 2 months prior to the date of your proposed event.
- Establish goals that are realistic and measurable.
- Identify your audience/people who you think will be interested in attending.
- Plan a budget. Identify sources of income and all expenses. If you keep costs down, you may generate a larger donation – something everyone will feel good about.
- All promotional and publicity materials must be approved by the Ross Memorial Hospital Foundation to ensure that you are using the Hospital and Foundation name, logo and charitable language correctly.
- Collect the funds and submit the proceeds. We ask that all funds be forwarded to Ross Memorial Hospital within 30 days of the conclusion of the event. The list of event donors and their information must also be included.
- **Until permission is received, the name of Ross Memorial Hospital and Foundation cannot be used for any purpose and contributions cannot be solicited.**
- The forms you submit for the event are valid only for that event. You must submit a separate form for each event.

Thank you again for your interest in planning an event to benefit RMH. A Foundation representative is always available to answer your questions or for guidance. Contact us at 705-328-6146 or foundation@rmh.org.



Third Party Event Proposal Form

Please complete, sign and return the event proposal form to the address below. Acknowledgement of your application will be forwarded to you within 10 business days.

Ross Memorial Hospital Foundation

10 Angeline Street North, Lindsay ON, K9V 4M8

Tel: (705) 328-6146 Fax: (705) 328-6147 E-Mail: foundation@rmh.org

Contact Information:

Name of Person or Organization Planning Event _____

Contact Name _____

Mailing Address _____

City/Province _____ Postal Code _____

Home Telephone _____ Alternate Telephone _____

Email Address _____

Name of Proposed Event _____

Date(s) _____

Event Location _____

Address of Location _____

Description of Event _____

Will this be a multi-year event to benefit the RMH Foundation? Yes _____ No _____

Financial Details:

Who do you expect to attend the event? _____

How will funds be raised e.g. ticket sales, raffles*, pledges, etc.? _____

_____ Cost per person? _____

(*By law, raffles require a charitable lottery license that must be obtained with the Foundation.)

Are you seeking sponsorship? Yes _____ No _____

If yes, who are you seeking sponsorship from? (Attach list, if needed) _____

Estimated revenue from event: _____ Estimated expenses: _____

Estimated donation to Ross Memorial Hospital Foundation: _____

Proposed Budget (List all expenses even if you expect them to be donated):

Location/Venue	\$ _____	Total Expenses	\$ _____
Food/Beverage	\$ _____	Total Expected Income	\$ _____
Printing (tickets/posters)	\$ _____	(-) Total Expenses	\$ _____
Advertising	\$ _____	= Revenue to RMH Foundation	\$ _____
Prizes	\$ _____		
Other (specify)	\$ _____		
Other (specify)	\$ _____		
Other (specify)	\$ _____		

* All expenses will be paid from the proceeds or directly by the event organizer. Receipts must be provided.

Logistics

How to you plan on promoting the event?

- Brochures/flyers Newsletters TV ads Print ads Radio Ads Personal network Coupons
 Other, please specify: _____

Will alcohol be served? If yes, how? _____

Who will obtain the liquor license? _____

Has the liability insurance been arranged? If so, please provide details: _____

We can provide you with guidance around the logistics of your event. Request for resources:

- Letter of endorsement Information about Ross Memorial Hospital Foundation

May we promote your event on our website? Yes _____ No _____

Can we release your name and contact info to the media if asked about your event? Yes _____ No _____

Would you like to have a cheque presentation photo after the event? Yes _____ No _____

Third Party Letter of Agreement:

- 1) I acknowledge that the Ross Memorial Hospital Foundation (RMH Foundation), its auditors, or other authorities may request verification of event revenue. I agree to provide all requested and/or required financial records and keep said records for two years from the event date.
- 2) Ross Memorial Hospital and Ross Memorial Hospital Foundation shall incur no legal or financial liability whatsoever associated with this event.
- 3) I agree to provide staffing and/or volunteers for this event.
- 4) Proceeds will be directed to the highest priority at RMH, unless otherwise stated.
- 5) Net proceeds from the Third Party Event together with all related financial reports will be remitted to RMH Foundation within 30 days of the Third Party Event.
- 6) If RMH Foundation has concerns about the way the project is being implemented and such concerns are not immediately addressed, RMH Foundation can cancel this agreement by giving the Third Party 24 hours notice. RMH Foundation is not responsible for financial or other damages that may result from cancellation.

By my/our signature/s below, I/we acknowledge that I/we:

- *Have received a copy of the RMHF "Hosting An Event" Planning Guide;
 - *Understand and agree to follow these procedures, related RMHF policies and applicable legislation.
- Further, I/we agree to:**
- *Indemnify and hold harmless Ross Memorial Hospital and Foundation and all its officers, directors and employees from any and all claims and liabilities in any way related to the event;
 - *Comply with all relevant municipal, provincial and federal laws;
 - *Enact liability insurance coverage and waivers with the Ross Memorial Hospital Foundation as required.

Event Name _____

Printed Name & Signature _____

Date _____ (Send signed original form to RMHF; keep a copy for your files)

For RMH Foundation use only ** Signed by RMH Foundation on _____ by _____

8 Approved by _____