



Department: Agency	Approved by: Management	Number: A9 Pr1
Title: Third Party Fundraising and Sponsorship		
Date of Original Version: April 11, 2016	Reviewed Date: March 2021	Revised Date: March 2021

Purpose:

In accordance with the Board’s policy on Donor Engagement to ensure that individuals and groups interested in conducting third party fundraising for Klinic have the appropriate supports and information to do so, and that funds are collected according to provincial and federal law, and in accordance with Klinic’s vision, mission and values.

Procedure:

- 1) Approval: Any individual or group interested in hosting a third party fundraiser is to complete an application (page 3) and submit it to the attention of the Executive Assistant to provide to the Director of Development for review.
- 2) Responsibilities: The Executive Director will be responsible for approval or denial of all fundraising events associated with Klinic and ensuring that all organizational policies and federal and provincial laws are complied with. The Director of Finance is responsible for ensuring all applicable tax and receipting laws and procedures are followed.
- 3) If the event is approved the following guidelines must be followed:
 - A) Promotion and Logo Usage**
Klinic will provide its logo upon approval of the event along with guidelines for logo usage. All promotional materials must be designed and printed or posted to the web by the third-party organizers. In naming the event or promotion, Klinic must not be used in the title, but should be listed as the beneficiary of the event. For example, organizers may not refer to the event as the “the Klinic Bowl-A-Thon” but it can be promoted as “Bowl-A-Thon in support of Klinic”. Klinic may promote the event, where appropriate, through our website, social media sites, e-mails or newsletter and will provide informational material on request.
 - B) Financial Guidelines**
 - Klinic cannot solicit sponsors for third-party fundraising event and does not provide any donor contact information.
 - Third-party fundraisers are responsible for paying all fundraising expenses related to their activity. It is recommended that event expenses should be 30% or less of the total amount raised, excluding any in-kind donations.
 - No bank accounts in the name of Klinic shall be set up. Klinic cannot process any credit card transactions for third-party fundraising events.
 - Any promotion that donates a portion of its sales must state clearly how much, in percentage or dollar amount, will go to Klinic.
 - Some fundraising activities, such as raffles, that involve selling to the general public, may need a licence. Check with your local or municipal governments.

- Klinik does not approve individuals soliciting funds door-to-door or by telemarketing.
- Klinik does not provide sponsorship to non-Klinik events except in situations where we are purchasing seating or participating in an event that is important to our community and/or partners
- All cheques should be made payable to Klinik and sent within 30 days of the event.
- Donations over \$10 made in cash or by cheque (made payable to Klinik) are eligible for charitable gift receipts. If receipts are requested, the names, addresses, postal codes, phone numbers and amounts of donations must be recorded and submitted with the donations. Note that an individual may not receive a gift receipt for money that was not donated by them (i.e. an individual cannot receive a receipt for monies raised at an event).
- Registered Charity # 10757 4063 RR0001.

C) Cancellation, Liability and Changes

- Klinik endorses fundraising events that respect the positive image of our organization and complement our mission. We reserve the right to deny or withdraw approval of an event if there are serious concerns about the impact on our organization's image.
- By submitting your fundraising idea, you agree to assume all risks and liabilities associated with the proposal and hereby release and hold harmless Klinik, its directors, officers, employees, agents and successors from and against any and all claims, damages, liabilities, costs and expenses, arising out of or may occur in conjunction with the proposal. By receiving information on your fundraising idea, Klinik is not obligated to enter into a fundraising event with you.
- You must advise Klinik of any changes in your fundraising event. If circumstances warrant, Klinik reserves the right at any time to ask you to cancel a fundraising event or remove our name from your event. If an event is cancelled you agree to release Klinik from any and all liability in connection with such action.

Thank you for considering Klinik for your fundraiser!

Please fill out the below information and email back to: donations@klinik.mb.ca

Part 1: Contact Information

Applicant/Organization Name: _____

Contact Name: _____

Address: _____

City/Town: _____ Province: _____ Postal Code: _____

Phone Number: _____ Cell Number: _____

E-mail: _____

Part 2: Event Information

Event/Promotion Information:

Name of Proposed Event: _____

Brief description of proposed event or promotion: (attach additional sheet if required):

Event Date/Time: _____

Planned Location of Event: _____

One-Time Special Event:

Projected Attendance: _____

How Funds will be raised (ex. Silent auction, ticket sales, pledges, sponsorship, etc.):

Does this Event Require a Licence? Yes No I don't Know

Customer Driven Promotion:

- Donate Percentage of Sale of item
- Donate Percentage of Total Sales
- Round Up Purchase Program (ex. Total is \$14.15 and round up to \$15 for Klinik)

Employee Driven Promotion:

- Hold an office event with proceeds going to Klinik (jeans day, potluck or bake sale)
- Other: _____

Part 3: Marketing and Promotion

Who will be promoting the event:

- Advertising Agency You/Your organization Other: _____

Which of the following ways will you promote the event:

- Internal Posters/Flyers Online/Social Media Public Service Announcements
- Other: _____

What dates are you planning to promote: _____

Do you need access to Klinik's Logo: Yes No

Part 4: Financial Information

Estimated Income from the Event: _____

Estimated expenses from the Event: _____

Estimated Donation Amount to Klinik: _____

How is the donation amount calculated (example: % of ticket sales):

Will tax receipt(s) be required: Yes No

Will other charitable organizations benefit from this event: Yes No

If yes, please list the other organizations that will benefit from this event:

Agreement:

A Third Party Application Agreement MUST be completed and submitted to Klinik no less than four weeks prior to the proposed fundraising activity. Approval will be granted on a per event/promotion basis and applicants must reapply annually for approval. **As the potential third-party fundraising event or promotion organizer I have read and understood the attached policy and the following:**

1. Klinik reserves the right to deny any application for fundraising activity that does not complement the mission, vision, values, or project a positive image of Klinik.
2. Permission must be given by Klinik to use our name/logo in conjunction with your event or promotion. Klinik must approve all publicity prior to distribution. Copies of publicity may be submitted to Klinik by email, donations@klinik.mb.ca or by mail.
3. Publicity may not imply that the event is sponsored or co-sponsored by Klinik, or that Klinik is involved as anything but as the beneficiary. The event name must be followed by "In support of", or "Proceeds to" followed by Klinik's logo.
4. The public should be informed how Klinik will benefit from the event or promotion. If Klinik will not receive all of the proceeds, then the exact percentage that benefits Klinik must be stated clearly on all related publicity.
5. Klinik must be notified if another organization will benefit from this event.
6. If you are doing a raffle, tag day, or other activity that involves selling to the general public, you may need a licence. In Winnipeg, call Civic Charities or City of Winnipeg Licensing. In other parts of Manitoba, please check the regulations in your area.
7. Klinik and all related entities are not liable for any injuries sustained by event volunteers or participants related to an event benefiting Klinik, and cannot assume any type of liability for your event.
8. Klinik cannot normally provide volunteers to support a special event.

Please keep a copy of your completed application for your records.

Return the signed original to:

Klinik Community Health
Attention: Executive Assistant
167 Sherbrook Street
Winnipeg MB R3C 2B7

Applicant Signature:

Date:

Klinik Approval:

Signature:

Date: