



LA FONDATION DE L'HÔPITAL GÉNÉRAL JUIF
SIR MORTIMER B. DAVIS
JEWISH GENERAL HOSPITAL FOUNDATION

JEWISH GENERAL HOSPITAL FOUNDATION THIRD PARTY EVENTS

Thank you for showing an interest in helping to raise funds for the Jewish General Hospital. Below you will find useful information and helpful hints to help you plan a successful event. Once you are ready, we ask that you please fill out the **Third Party Event Proposal Form** which will then be reviewed and approved by the Director of Special Events.

In approving sponsored events the following guidelines shall be considered:

Nature of Event:	The event should not, by association, have the potential to adversely affect the hospital's image, or conflict with the hospital's mission and goals of promoting a healthy community.
Success:	The event being considered should have a reasonable chance for success.
Long Term Plans:	The event does not compromise or have the potential to adversely affect the JGH Foundation's annual or long range plan for fundraising and development.

How to Hold a JGH Foundation Third Party Event:

1. **Register Your Event:** Once you have selected your event, it is important that you register it by completing and returning the **Third Party Event Proposal Form**. This allows the JGH Foundation to endorse your event, provide you with permission to use our logo as well as advice that will help make planning your event easier and more fun.
2. **Form a Planning Committee:** The saying "many hands make light work" can certainly apply in event planning. A team of dedicated volunteers can bring more ideas, skills and connections to the table making your event planning easier.
3. **Brainstorm Ideas:** Brainstorming ideas can be a lot of fun. Little ideas and details can create a fun atmosphere that will make your event more enjoyable for your participants.
4. **Plan, Plan, Plan:** Events require a lot of detailed plans and back up plans to make sure they are successful. Planning goals for your event, deciding how you'll reach those goals and preparing a budget will help you accomplish your objective. Make a list of duties and timelines so you can stay on track.
5. **Collect the Funds:** We ask that you return all funds to the JGH Foundation within 30 days of your event or prior to December 31, whichever is soonest. However, the quicker you return the funds and tax receipt information, the quicker we can send thank you letters and receipts (if applicable and approved) to the donors.
6. **Thank You:** You can never thank people enough for hard work as volunteers, participating and giving. They'll appreciate hearing how much of a difference they have made — especially if you tell them how much money they helped you raise.

The JGH Foundation can provide the following assistance once your event has been approved:

- An endorsement letter that confirms you are raising money on our behalf
- Permission to use the Jewish General Hospital Foundation name and logo
- Event listing on our website
- Issue tax receipts if applicable and/or letters confirming receipt of payment

The JGH Foundation cannot provide the following:

- Funding or reimbursement for event expenses
- Mailing lists such as donors or hospital staff
- Applications for permits or licenses
- Guaranteed attendance of JGH Foundation Board Members and/or hospital VIP's at your event
- Guaranteed staff or volunteers at your event
- Prizes or auction items
- Post-event follow-ups (i.e. outstanding monies, thank you letters, etc.)

Tax Receipts

The JGH Foundation issues tax receipts in accordance with the Canada Revenue Agency (CRA) rules and regulations. It is imperative that the Foundation abide by these rules and regulations. We would be happy to provide tax receipts but **you must register your event using the attached proposal form and be approved for tax receipts prior to your event.**

As a third party event, you are acting on behalf of the JGH Foundation, so it is important that you understand the rules and regulations regarding tax receipts before you hold your event. It is your responsibility to communicate tax receipting decisions with your participants so that they have appropriate expectations. It is very important for us to meet our donors' expectations as much as possible and it places us in a difficult situation when donors expect a receipt for something that by law, we simply can not issue. With your understanding and communication, you can help us continue to build a good reputation in the community.

Summary of Tax Receipt Rules

1. You have submitted an Event Proposal Form and been given approval by a representative from the JGH Foundation.
2. You provide a complete and legible list of donors including the following information: (A sample form will be provided.)
 - a. First and last name
 - b. Address, including city and postal code
 - c. Amount given
 - d. Amount tax receipt to be issued for
 - e. List and Fair Market Value (FMV) of any benefits received for the donation (Fair Market Value – the total costs for item received without discount)
3. The tax receipt information and donations are received within 30 days of your event or before December 31, whichever is soonest.
4. The tax receipt is being issued to the person who made the donation (unless the Cheque issuer acts as a donation collector and issues a complete list of donor details as listed above).

Tax Receipt Rules for Specific Gift Types

Donation and Pledge: A donation by cash, cheque or credit card given directly to the Foundation without any benefit (receiving any item or service) can be issued a receipt.

Auction Item Purchase: A tax receipt cannot be issued because the participant receives something (the purchased item) in return as well as the chance to participate in the auction. Exception: If the winning bidder pays more than the value of the auction item, a partial receipt can be issued for the amount given above the item's value.

Ticket/ Entrance Fee to Event: Generally a tax receipt is not issued because a person is receiving something in return for the funds paid. If the ticket or entrance fee exceeds the Fair Market Value (FMV) a receipt may be issued for the amount given above the FMV. For example: If someone buys an event ticket for \$100 and the FMV of the entertainment, food and drinks is \$65 then a tax receipt can be issued for \$35 (the portion of the ticket price that reflects the true donation beyond the value of the event).

There are many rules and regulations that must be adhered to and detailed documentation required when issuing receipts for tickets and entrance fees. **You must speak to a Foundation representative prior to your event to confirm the details of your event and determine what you can offer receipts for.**

Gift in Kind: A tax receipt may be issued when an individual donates an item if the Fair Market Value is established and documented. Documentation required can include a proof of purchase or invoice, independent third party appraisal or a current price list for the same item from a recognized enterprise operating separately from the donor.

A tax receipt cannot be issued for personal services including legal, entertainment, transportation, rentals or dining services.

Gifts of artwork or wine may also require more information such as a list of credentials for the appraiser, a history of the artist, a description, picture and history of the piece, the methodology used to value the artwork, and more. Please be sure to notify the Foundation staff of potential gifts of artwork or wine.

Sponsorship/ Advertising Books: A tax receipt is not issued for sponsors or company advertisements* because they receive benefits in the form of recognition and advertising. We can however, provide a letter confirming their gift that can be used to write the gift off as a business expense.

* *Personal advertisements are fully receiptable (i.e. Compliments of the Silverman Family)*



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Please complete this form and return to:

Adrianna Di Pardo
Associate Director, Events
3755 Cote Ste-Catherine Road, A-107
Montreal, QC H3T 1E2
T: (514) 340-8222 x2549
F: (514) 340-8744
adipardo@fon.jgh.mcgill.ca

Third Party Event Proposal Form

Date of proposal:

Name of organization/company planning event:

Contact name:

Title:

Address:

City:

Postal Code:

Tel (home):

Tel (office):

Tel (cell):

Email:

Website:

Event Information

Name of proposed event:

Date(s):

Time(s):

Event location(s) and address(s):

Description of event:

What inspired you to hold this event:

What type of audience do you plan to target for your event? (i.e. general public, businesses, etc)

Note: When approaching businesses and corporations for assistance with events (sponsorships or gift-in-kind donations), please remember that many organizations are already involved in supporting the **JGH Foundation**. All solicitations on behalf of the JGH Foundation **MUST BE CLEARED** by the Foundation first.

How many people do you expect to attend the event?

How do you plan on marketing or promoting your event?

- Internal promotion such as newsletters
- Posters/Flyers
- Advertisements
- Public Service Announcements
- Website (provide address)
- Other, please describe: _____

Do you intend to use the name and logo of the JGH Foundation? Yes No

If deemed necessary by the JGH Foundation, are you prepared to allow a Foundation representative to be involved with your planning committee for general and ongoing approval of plans for the event? Yes No

What degree of involvement would you expect from the Foundation Staff/Board of Directors in relation to participation in your event?

Proposed budget

Please list all revenues and expenses and indicate what you expect to be donated

1 How would you like the proceeds of your event designated:

Area of greatest need Other: _____

2 Revenue		3	Expenses	
Sponsorships	\$		Venue Rental	\$
Registration Fees	\$		Food	\$
Ticket Sales	\$	(# ___ x \$ _____)	Beverage	\$
Advertising/Souvenir Book	\$		Printing	\$
Cash Donations	\$		Security	\$
Ancillary Fundraising (i.e. silent auction, raffle)	\$		License Fees	\$
	\$		PR/Advertising	\$
	\$		Signage	\$
	\$		Entertainment	\$
	\$		Gifts & Prizes	\$
	\$		Rentals/Services	\$
	\$		Other (please specify)	\$
	\$			\$
	\$			\$
Total Revenue	\$		Total Expenses	\$
			Total Profit	\$

Tax Receipts

4 Do you require tax receipts? Yes No

5 If yes, what for? Please check all that apply.

- Regular donation (no advantage)
- Event tickets/Entrance fee
- Gift-in-kind donation

6 The JGH Foundation logo is a registered trademark, the use of which is restricted. By signing below, I agree all publicity, including air publicity such as radio, for the proposed event must be approved by JGH Foundation prior to being printed, released, etc.

Signature of Applicant: _____ Date: _____

Acknowledgement of your application will be forwarded to you within 10 business days.
Your support is greatly appreciated!

For JGH Foundation use only:

Ticket/Entrance Fee:

Value of any products/gifts received:

Value of any door prizes:

Event ID#:

Terms if any:

Approved by:

Date:

Rules and Regulations

- **Permits:** the event organizer will obtain at his/her expense, all permits, licenses and insurance.
- **JGH Foundation logo:** our name and logo can be used only with permission.
- **Liability:** participants shall indemnify and hold harmless the JGH Foundation from and against all liability, claims, damages or expenses due to or arising out of the proposed "Special Event".
- **Tax receipts:** the Canada Revenue Agency (CRA) has put into place very strict regulations regarding the issuing of income tax receipts. If you intend on offering tax receipts, this must be pre-approved by the JGH Foundation.

Receipts will not be issued in the absence of a donor's name and address. Receipts will not be issued in the event a donor has paid an expense pertaining to the event but there is no clear evidence he/she has done so such as a cancelled cheque, a credit card statement or written acknowledgement from the vendor. Cash donations may be pooled, but all donors must be accounted for, with the remainder, if any, confirmed as anonymous.

- **Timelines:** we request that your donation(s) to the JGH Foundation (the Foundation) be turned in within four weeks after your event. Please ensure cheques are made payable to the JGH Foundation with reference of the event name on the bottom or back of the cheque.
- I (we) understand that I (we) will be acting on behalf of the Foundation and may receive private and confidential information including gift amounts and banking information from individuals who donate to the event. As such, I (we), the event host(s):
 - will not maintain personal information for private, or business use
 - will not disclose any personal information (donation amounts, banking information, etc.) to anyone other than the Foundation representatives
 - will not alter any information received from event participants
- I (we) will adhere to all tax receipting rules and regulations. I (we) understand that tax receipts may be offered if approved prior to the event date and I (we) are responsible to provide the Foundation with a full accounting for donations as required by Canada Revenue Agency.
- All proceeds from event will be returned to the Foundation office within 30 days from event date prior to December 31 (whichever is soonest).
- All use of the Foundation logo will be approved prior to release.
- I (we) will obtain all necessary permits and licenses and insurance for the event.
- The Foundation reserves the right to withdraw permission to use name and logo at any time without assuming responsibility for costs and expenses.
- Should an event be cancelled I (we) will inform the Foundation at least 1 day prior to event date.
- The Foundation will not assume any financial or legal liability.
- The Foundation is not held liable for damages or accidents to people or property.

I (we) fully understand and agree to comply with the rules and regulations. I (we) understand that should I (we) breach the above stated contract, the JGH Foundation will no longer endorse event I (we) are involved in planning and may result in criminal prosecution.

Signature: _____ **Date:** _____

Please sign both copies and submit a copy to Adrianna Di Pardo by fax at (514) 340-8744, please keep a copy for your files.

Thank you!

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