

Comprehensive guide to Successful Fundraising

2023-2024



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Introduction

Thank you for your interest in supporting CHU Sainte-Justine and its Foundation by planning a fundraising activity.

Your commitment helps us achieve our vision and mission of providing the children and mothers of today and tomorrow with one of the highest levels of health care in the world.

Before you get started, take a look at this guide to organizing an effective fundraiser. In it, you'll find tips, useful tools, and activity ideas from our fundraising experts that can make your activity a success!



Before you begin

If you'd like to organize a fundraising activity for the CHU Sainte-Justine Foundation, we suggest you follow these steps, which will be described in greater detail in this guide:

1. Find out how the CHU Sainte-Justine Foundation can support your activity.
2. Fill out the fundraising approval request form.
3. Wait for our approval before you get started. A representative of the CHU Sainte-Justine Foundation will contact you to sign an agreement and provide you with a letter or email confirming your collaboration.
4. Use the activity planning checklist to help you get organized.
5. Send us your financial summary no later than 30 days after your activity.
6. If you choose not to use our fundraising platform, please send us the amounts raised no later than 30 days after your activity.

⇒ In the case of a discrepancy between this guide and any agreement or confirmation letter or email, the agreement, letter, or email will take precedence.

Feel free to contact us if you have any questions or need more advice!



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CHU Sainte-Justine: Driving innovation for 115 years

CHU Sainte-Justine has long held a select place among the best mother-child hospitals in the world. With its unique operating model, it brings together all health professionals in a continuum of care, teaching, research, prevention, and rehabilitation.

The provincial government has identified CHU Sainte-Justine as a **designated pediatric centre**. It's also the only health care facility dedicated exclusively to children, teens, and mothers in Quebec, as well as the **largest mother-child university hospital centre in Canada**.

Affiliated with Université de Montréal, CHU Sainte-Justine is by far the largest pediatric training centre in Quebec and a leader in Canada: every year, it hosts 3,500 students and residents and **trains more than 80% of Quebec's pediatricians**.

With its provincial mandate, CHU Sainte-Justine is stepping into its global leadership role. Its expertise benefits families from all over Quebec.

Our responsibility is to
provide the best patient
care at all times.

To be at the forefront.

To seek and persevere
where answers have yet
to be found and to shine
a light on the best of
humanity.





What is a fundraiser?

Definition

A fundraiser is a one-time or recurring non-commercial activity organized by a third party (an individual, family, organization, foundation, or group) to raise funds for a selected charity with that organization's approval.

Criteria

Apart from the costs directly associated with organizing the activity, all the funds raised are donated to the cause. Fundraisers rarely involve the sale of a product. The organizer has no commercial interest in the activity.

Fundraising activity are usually promoted within the organizer's immediate network (friends and family, association members, colleagues or coworkers, etc.). However, they can also be much larger and intended for a wider audience.

Keep reading to learn more about how you can organize your own fundraising activity in support of the CHU Sainte-Justine Foundation.

Examples of fundraising activities

Want to get started, but you're short on ideas? These may inspire you:

SPORTS CHALLENGES :
Golf tournament
Marathon
Kurling

EVENTS :
Dinner or gala
Hosted event
Fashion show

CELEBRATIONS :
Birthday
Wedding

SALES :
Bake sale
Garage sale
Craft sale





Support for your activity

The Foundation's team is available to advise you and share its expertise on organizing a successful activity.

Services chart

Services	Bronze tier \$9,999 and less	Silver tier \$10,000 to \$99,999	Gold tier \$100,000 and above
Support and advice as you organize your activity	X	X	X
Access to the <i>Guide to Successful Fundraising</i> , which provides the tools you'll need to hold your activity	X	X	X
A letter confirming that your activity is indeed a benefit for the CHU Sainte-Justine Foundation	X	X	X
Use of the Foundation's name and the "For the benefit of the CHUSJ Foundation" logo once the visuals have been approved	X	X	X
Access to our fundraising page tool (if applicable)	X	X	X
Tax receipts issued in accordance with the rules of the Canada Revenue Agency (if applicable)	X	X	X
Drafting of an agreement between the two parties		X	X
Presence of a representative on the day of the activity (if applicable)		X	X
Customer service for activity participants and donors (if applicable)			X
Sharing of one of your stories on one of the Foundation's social media pages			X
Presence of one of the Foundation's administrators at your activity (to be decided based on relevance and availability)			X
Advice regarding a recognition program for participants, donors, and organizers			X

Refusal of an activity

The Foundation is under no obligation to approve a proposed activity.

Any activity contrary to law or public order will be refused.

An activity may also be refused in the following cases, among others:

- The activity involves expenses beyond acceptable ratios (expenses must account for no more than 20% of the activity's gross revenues);
- Consideration other than appropriate recognition (e.g., money or another form of benefit) is expected in return for the activity;
- The activity involves mobile solicitation and/or door-to-door canvassing on behalf of the CHU Sainte-Justine Foundation (Halloween events with schools are an exception);
- The activity breaches the Foundation's donation acceptance rules, such as by exposing the Foundation or CHU Sainte-Justine to unacceptable reputational risk or liability.

What's not covered by the Foundation

- Management of the activity (room rental, truck or equipment rental, reception management, checkroom logistics, recruitment of volunteers, hiring of a caterer, etc.);
- Expenses for organizing the activity;
- The reimbursement process for expenses incurred to organize the activity;
- The sharing of the Foundation's solicitation lists and lists of preferred sponsors, artists, or pro athletes;
- The search for sponsors, auction items, or raffle prizes;
- The promotion or sale of tickets for the activity;
- Applications for permits or licences (e.g., meeting permits): although we are pleased to support and advise you with regard to these more technical steps, each organizer is responsible for obtaining the necessary permits for holding their activity;



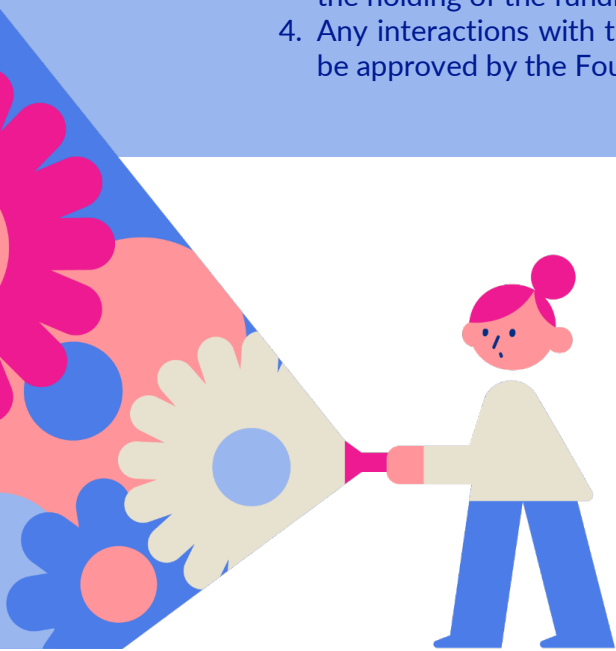
Terms and conditions

1. The organizer is not authorized to act on behalf of the Foundation. The Foundation is not a partner or sponsor and does not endorse any of the goods or services used by the organizer.
2. The organizer agrees to appoint someone who will act as a contact person for the Foundation.
3. The organizer must keep the Foundation informed of any changes regarding the activity. The Foundation reserves the right to refuse any change that significantly alters the nature of the Activity initially planned and accepted by the Foundation, or the risks associated with said Activity. The parties agree to keep each other informed of the activity's financial progress, at a frequency to be determined between them.
4. The Foundation reserves the right to be present at the activity.
5. The organizer agrees to share with the Foundation the lists of partners and sponsors who will be solicited in order to prevent repeat solicitations that could be detrimental to the efforts of the partners/organizers, as well as those of the Foundation.
6. The organizer must take out their own third-party liability insurance coverage. This insurance must cover all activities related to the activity. The Foundation may ask the organizer to provide proof of insurance to ensure this obligation has been met.
7. Depending on the type of activity the Foundation may require that the organizer have each participant sign a disclosure of risks and release form approved by the Foundation. The Foundation can provide the organizer with a sample form upon request.
8. The organizer cannot open any bank accounts using the name of the Foundation or its registration number.
9. The organizer agrees to inform its donors, participants, and partners of the applicable payment methods.
10. The organizer agrees to comply with all applicable federal, provincial, and local laws and regulations, to obtain all required permits, and to take all reasonable steps within its purview to ensure that nothing will tarnish or risk tarnishing the widespread and recognized image or reputation of the Foundation and/or its directors, officers, employees, agents, and volunteers (collectively, the "Affiliated Parties").
11. The organizer expressly acknowledges and agrees that neither the Foundation nor its Affiliated Parties shall be liable in any way or to any person for the organizer's actions or inaction with respect to the activity.
12. The organizer agrees to release, indemnify, defend, and hold harmless the Foundation and its Affiliated Parties from and against any and all faults, suits, claims, demands, liabilities, expenses, damages, and costs (including all reasonable judicial or extrajudicial costs and fees) arising from or in any way related to the activity.
13. The Organizer, in accordance with Bill 25 on the use of personal information, commits to reasonably communicate with the individuals involved and to avoid any excessive communication.
14. The Foundation can order the organizer to put an end to the activity if maintaining the relationship with the organizer is not aligned with the Foundation's goals or is liable to harm or compromise the mission, values, programs, activities, public relations strategies, autonomy, integrity, ethics, or reputation of the Foundation or CHU Sainte-Justine, or if the latter party fails to respect the terms and conditions set forth in this commitment.

15. In all cases, the organizer will be required to transfer to the Foundation all monies raised on behalf of the Foundation, to cease using the Foundation's name, logo, and brand, and to cease all promotion of the activity.
16. As a general rule, the funds raised in connection with the activity will be dedicated to the Foundation's general fund.
17. If the Foundation agrees to designate the sums for a specific purpose, they will be subject to the applicable levies:
 - 5% to priority innovation projects identified by CHU Sainte-Justine and its Research Centre and subsequently approved by the Foundation (not applicable where designated for general research), in accordance with its rules of governance;
 - 10% to increase the Foundation's capacity to collect and distribute funds for CHU Sainte-Justine priorities and to cover some of its own administrative costs;
18. Nevertheless, it is understood that the priorities and needs of the Foundation and CHU Sainte-Justine, which it supports, may change over time, for example, as a result of scientific advances or organizational changes. In such a case, using the amounts collected based on their designation may, in the joint opinion of the Foundation and CHU Sainte-Justine, become inappropriate, unrealistic, impossible, or irrelevant. If the Foundation determines that a revised designation is necessary, it may allocate some or all of the amounts collected for other purposes, provided they reflect, to the best of the Foundation's ability, the substance of the organizer's original intent, as determined by consulting with the organizer where possible.

Rights granted and media relations

1. As part of the activity, the Foundation grants the organizer a limited, non-transferrable, and non-exclusive right to use the Foundation's name, logo, and official mark for all promotions and visuals, and any paper or digital materials in connection with the activity (the "Promotional Material"), in order to indicate that the activity benefits the Foundation.
2. Any use of the CHU Sainte-Justine Foundation's name, logo, and official mark requires the prior written approval of the CHU Sainte-Justine Foundation. The Promotional Material must be submitted to the Foundation for approval at least four (4) business days prior to its planned publication/release.
3. There must be at least five (5) business days between submission of the approval request and the holding of the fundraising activity in question.
4. Any interactions with the press or media relations in connection with the activity must first be approved by the Foundation at least four (4) business days prior to the event.





Sharing of personal information

The personal information of activity donors and participants must be managed in accordance with applicable laws.

The **organizer** is invited to include in their material the following consent clauses (checkboxes), where applicable:

“The CHU Sainte-Justine Foundation has a policy of issuing a tax receipt for eligible donations of \$20 or more. By checking this box, you acknowledge that you would like to receive a tax receipt and thereby consent to sharing all personal information necessary to issue this receipt with the Foundation.”

By registering for activity X, you consent to the disclosure of your personal information to the CHU Sainte-Justine Foundation, which will manage it in accordance with its policy accessible at www.fondationstejustine.org.

The **Foundation** agrees to include the following consent clauses in its materials (checkboxes), if applicable:

(Donation portion) By providing personal information to the Foundation or its authorized representatives, you consent to the Foundation’s collection, use, and disclosure of such information in accordance with applicable law, including for the purposes of and in the manner necessary for carrying out its mission and philanthropic activities. Among other things, you consent to the disclosure of some of your personal information to the organizer of this activity for the purpose of recognizing your contribution. For more information, including details about your access rights, right to rectification, and right to withdrawal of consent, please see the [Foundation’s Privacy and Personal Information Protection Policy](#).

(Registration portion) By providing personal information to the Foundation or its authorized representatives, you consent to the Foundation’s collection, use, and disclosure of such information in accordance with applicable law, including for the purposes of and in the manner necessary for carrying out its mission and philanthropic activities. Among other things, you consent to the disclosure of some of your personal information to the organizer of this activity for the purposes of following up on your registration and recognizing your contribution. For more information, including details about your access rights, right to rectification, and right to withdrawal of consent, please see the [Foundation’s Privacy and Personal Information Protection Policy](#).



How to issue tax receipts

The Foundation adheres to the rules of the Canada Revenue Agency and is solely responsible for tax receipts and their issuance, where applicable, in accordance with its policies.

Tax receipts are issued to those who made the donation or took part in the activity rather than to the organizer.

Where donations are made via an activity fundraising page hosted by the Foundation, donors will automatically receive an electronic tax receipt for their online donation.

For all other donations and activity participations, the organizer must provide the Foundation with a detailed report within 30 days of the activity. This report must be submitted electronically, and for each donation/participation, must include the name of the donor/participant, their full mailing address, the amount of the donation/participation, the method of payment, and, if applicable, the donor's email address and phone number with area code.

With respect to participation costs, the organizer will also be required to indicate the value of any benefits received by the participant (e.g., food and beverages, entertainment, gift bags) and provide proof of same. This amount must be deducted from the cost of participation when determining the amount eligible for a receipt.

Note: For credit card donations, the tax receipt is issued in the name of the cardholder. For a donation by cheque, the tax receipt is issued to the name appearing on the cheque as the holder of the account from which the cheque is drawn.



Sponsors: Tips and best practices

Organizing a fundraising activity often involves expenses. For example, to organize a gala, you'll probably have to rent a venue, find a caterer, and hire musicians or a DJ.

These expenses reduce the funds donated to the Foundation. In many cases, organizers don't know how to curb expenses while still providing a great event for participants.

One way to reduce or even cover your event's expenses is to find sponsors.

Definition

There is a difference between a financial sponsor and a goods and services sponsor. A **financial sponsor** gives a certain amount of money to an event in exchange for the visibility of its product, brand, or service.

In contrast, a **goods and services sponsor** gives a number of products or offers a service at an activity in exchange for the visibility of its product, brand, or service.

The sponsor's visual identity is generally shown in the activity's promotional or visibility materials. The sponsor also benefits from the awareness around the activity and its visibility.

How to find sponsors?

Follow these steps to start finding sponsors:

- A. Build a visibility plan (also called a sponsorship plan); you can find examples on the web. You can also contact us, and we'll be happy to share our advice.
- B. Draw up the lists of sponsors who will be solicited for the activity in order to prevent repeat solicitations that could be detrimental to the efforts of both the organizer and the Foundation.
Note: Think of potential sponsors who are in your network or who would benefit from partnering with your activity because your participants are their target audience.
- C. Submit the list to your Foundation representative and wait for approval before reaching out.
- D. Once the Foundation approves your list, you can begin contacting potential sponsors.
- E. Make an agreement with the sponsor; you'll find numerous examples on the web. You can also contact us, and we'll be happy to share our advice.

Note: It's best to mention in your agreement with a financial sponsor that if your activity is cancelled after non-reimbursable expenses have been incurred, you will refund the sponsorship amount less these expenses.



Financial estimate for your event

Please complete this appendix at two times:

- Before your activity: At least four (4) weeks prior to the event to validate your projected budget with you.
- After your activity: Within thirty (30) days following the conclusion of your activity and submit as instructed below along with your payment and official accounting documentation to support your fundraising efforts. Please make checks payable to "Fondation CHU Sainte-Justine."

Important: This appendix also enables Fondation CHU Sainte-Justine to calculate the value of tax receipts for your participants and/or donors.

Gross revenues for your event	Projected	Real
Sponsors		
Ticket sales (total _____ X \$_____)		
Silent or live auction		
Draw or contest		
Other revenue (please specify):		
Total gross revenues		
Event expenses	Projected	Real
Room rental		
Equipment rental		
Security		
Permits		
Food		
Beverages		
Printing		
Graphic design		
Photographer		
Videographer		
Videographer		
Entertainment (e.g., comedian, master of ceremonies)		
Gifts or door prizes during event		
Other expense (please specify):		
Total expenses		
Contributions to your activity	Projected	Real
Individual donations		
Corporate donations		
Net amount raised (Revenues)		
(Total gross revenues – Total expenses + Donations)		



Donor/participant report

This report must be submitted electronically and, for each donation/participation, must include the name of the donor/participant, their full mailing address, the amount of the donation/participation, the method of payment, and, if applicable, the donor's email address and phone number with area code. See below for a sample table that you can fill out and return to us.

Donation or participation	First and last name	Full mailing address	City	Postal code	Email	Phone	Amount	Method of payment	Receipt?

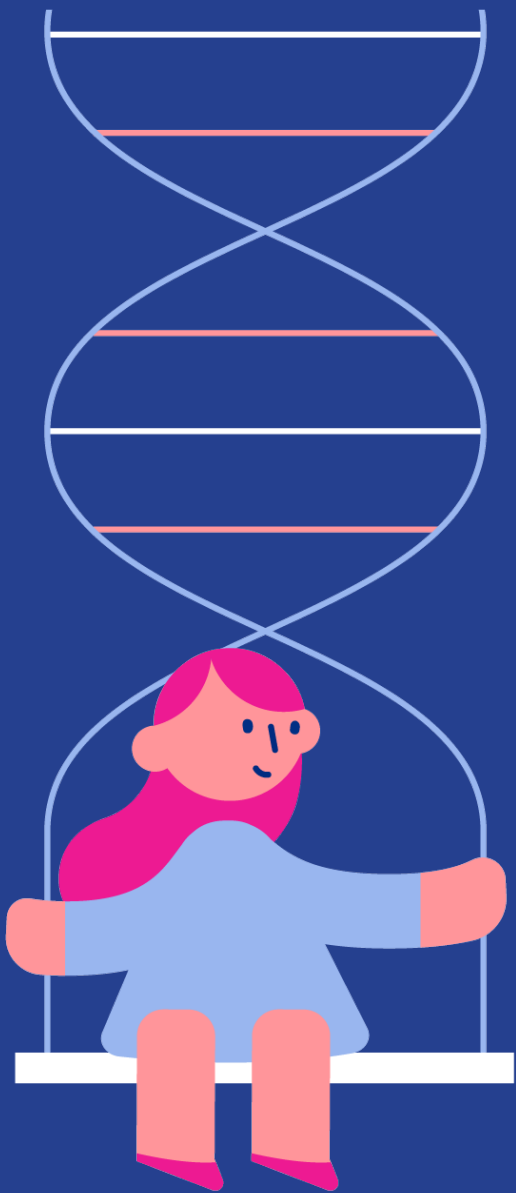


Activity planning checklist

Follow the steps in this checklist as you organize your activity. Note that this is a general plan that you'll need to adjust to reflect the nature of your activity.

Before the activity	
	Choose an event to organize
	Set a financial goal and build a budget
	Choose a date and location for the activity
	Submit the fundraising approval request form
	Await approval by the CHU Sainte-Justine Foundation
	Draw up a schedule
	Find volunteers who will be there on the day of the activity
	Find a team to oversee participant safety (depending on the size of the activity)
	Find sponsors
	Promote the activity on social networks
	Plan for all the material you'll need for the activity
During the activity	
	Inform volunteers about their roles and responsibilities
	Assign someone to manage reception/donations
	Make sure the activity is safe and have a medical team on-site (depending on the size of the activity)
	Have fun!
After the activity	
	Thank everyone who helped make the activity happen (participants, donors, sponsors, volunteers, etc.)
	Fill out the financial summary for the activity and the donor/participant report.
	Email both these documents to evenements-benefice@fondationstejustine.org





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