



Third-Party

Fundraising TOOLKIT

OKANAGAN COLLEGE FOUNDATION





Help us train the next generation of health care professionals

Our current priority fundraising campaign is **Our Students, Your Health.**

With the public's help, we will open the doors to a \$18.9-million state-of-the-art Health Sciences Centre on the College's Kelowna campus this year, ensuring students are learning in modern facilities and are well prepared to respond to our future health challenges.

Now, more than ever we realize the importance of well-trained health care professionals for ourselves, our loved ones and our community. With critical skills shortages in health care, Okanagan College students are essential to the future health and well-being of the region. A new Centre will help the College attract talent from across the province. Studies show students who do practicums locally are more likely to stay in the community after they graduate.

Many local champions are already stepping up to the plate to support this important cause as strategic investment in the future of health care. [Click here](#) for stories.

We're halfway to reaching our \$5-million fundraising goal to complete construction, provide program support and create new scholarships and bursaries for students entering in-demand careers. Help us train the next generation of health care professionals.

Visit OurStudentsYourHealth.ca to learn more.



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Welcome and thank you

Welcome! Thank you for wanting to learn more about how you can support students and programs at Okanagan College by raising funds for the Okanagan College Foundation. We've designed this helpful toolkit to give you the resources you'll need to make your fundraiser a success.

Why support the Okanagan College Foundation?

Education is transformative and the Okanagan College Foundation's mission is to support the transformative power of education.

Thanks to supporters like you, we can assist a range of students from those just leaving high school to single parents returning to school in their 30s or 40s. What binds all these students is the understanding that they can create a better life for themselves and their families through education.

When you support the Okanagan College Foundation you are helping create world-class learning environments that match the quality of the College's education. You're also helping students excel in their studies as a result of being able to focus on school and work less with student awards.

With the support of donors, Okanagan College has become a renowned educational institution with 70% growth in students since 2005. The College is the second largest trades training institution in B.C. and has a student base of more than 21,000 students.

We encourage you to read our [Annual Report](#) to learn how students are achieving big goals thanks to donors like you.

How will the funds be used?

You can determine what program or area of need your fundraiser will support – or you can leave it open so that we can allocate the funds to current priority projects.

Currently, our main fundraising campaign is the Our Students, Your Health campaign. This \$5-million campaign will help complete a new \$18.9-million Health Sciences Centre and create new scholarships and bursaries for students entering high-demand health care careers. To learn more about the Our Students, Your Health campaign, visit Health Sciences Centre.

You can choose to designate the funds raised through your event to capital improvements, program support or create a student award. You can also give to the area of greatest need, helping us address priority issues.

Some programs and areas of need are listed below.

- Greatest need
- Business
- Trades
- Health Sciences

For a search of all of Okanagan College's program areas, please click [Programs](#).

Section 1: Planning a fundraising event

WHAT IS A THIRD-PARTY EVENT?

A third-party fundraising event is an event organized and promoted by an individual, group or organization. The organizers act independently but with the Okanagan College Foundation's knowledge, approval, and in certain instances, direct support.

THIRD-PARTY TOOLKIT

This Third-Party Toolkit provides you with a step-by-step guide on how to organize an event to support the transformative power of education.

It is organized into three sections; what to think about before, during, and after your event.

It also contains:

- Event Request Form
- Policy Statement
- Pledge Form
- Guidelines for Social Media Use
- Photo Release Form
- Cash Sheet
- Financial Summary

CHOOSING AN EVENT

There are many types of events you can consider when planning your fundraiser. We encourage you to get creative, think about your unique talents and strengths and explore how you can use these to raise funds to support students.

Here are just a few ideas:

- A cocktail or dinner party
- A barbeque, pancake breakfast, bake sale, or pizza lunch
- An 'A-thon' (read, run, walk, swim, dance, sing)
- A sports tournament – golf, bocce, pickle ball, soccer, hockey - the sky is the limit!
- A concert, play, movie screening or fashion show
- A bottle drive or lemonade stand
- A jeans day or ugly sweater day
- An In Memorial event, or gifts in lieu of a birthday or other special anniversary

ADDING A FUNDRAISER

Once you have a general overview for the event, it's time to add a fundraising component.

Here are some options:

- A live or silent auction
- Ticket sales
- A percentage of food or beverage sales
- Proceeds from a raffle or 50/50
- Pledges
- Sponsorship
- Peer-to-peer giving

GET IN TOUCH!

If you have an idea and would like some input on the best way to proceed, please see Appendix A and read our Policy Statement before moving on to Appendix B, the Event Request Form. You can also contact us at foundation@okanagan.bc.ca. Our team is happy to discuss your idea and help you find ways to make it a success.

MAKING A PLAN

Once you have an event overview it's time to create a detailed plan. Please consider the following guideline:

CHOOSING A VENUE

Depending on your event, you may need to rent a space. You can find rental options by visiting sites like [Tourism Kelowna](#) or [Eventective](#).

VOLUNTEERS

Do you need volunteers to help organize and run the event? Decide what needs to be done to achieve success and start recruiting your friends, family and colleagues to fill those positions.

BUDGET AND FUNDRAISING GOAL

One of the most important aspects of a fundraiser is setting a fundraising goal and planning for how you hope to achieve it.

You will also need to factor in any expenses you might incur from the event. The Okanagan College Foundation is not liable for event expenses.

Below are some of the main things you may need to consider:

- Cash Sheet
- Financial Summary

LICENSES AND INSURANCE

Depending on the nature of your event and the way you are planning to raise funds, some licenses may be required.

Gaming Activities: Any gaming activities (e.g. ticket raffles, poker, bingo, casinos, etc.) require a license.

- All gaming funds raised by a community fundraising group must be donated to an eligible organization.
- Each application from a community fundraising group (i.e. you) must have an accompanying letter from the eligible recipient organization (i.e. Okanagan College Foundation) that acknowledges the event, agrees to accept the proceeds and agrees to use them for eligible purposes.
- Community fundraising groups may apply for a Class B ticket raffle only (gross revenue of \$20,000 or less).
- All gaming funds must be identified as such in your reporting back to the Okanagan College Foundation.
- For more information or to apply: click [Gaming License](#).

Special Event Permit (SEP):

- If you want to serve or sell liquor in a public space that is not licensed, click [Special Event Permit](#)

Other common licenses and permits required for events include Outdoor Event Permits for City-owned properties, Temporary Food Service Permits from Interior Health, and SOCAN Licenses for publicly played music.

For further details you should check with City, Police, Liquor Control & Licensing Branch and Gaming Policy & Enforcement Branch.

Okanagan College Foundation's special/sporting event insurance policy does not extend to this event. Third-party organizers are required to arrange for appropriate insurance coverage for the event. The event organizer accepts responsibility for claims that may arise because of the event.

OFFERING TAX RECEIPTS

Okanagan College Foundation is a registered charity and can issue official donation receipts to donors for gifts, in line with the Income Tax Act and Canada Revenue Agency (CRA) guidelines.

Donors to your event are only eligible for tax receipts if they donate directly to the Okanagan College Foundation. For example, eligible donations include:

- Any kind of donation that goes directly to the Foundation. This includes cheques made to the Foundation, online donations to the Okanagan College Foundation and cash. For cash donations that require a receipt, please see Appendix C and the Pledge Form.

The following are not eligible for charitable tax receipts under CRA guidelines:

- Payment of an event fee or ticket entry/admission to an event.
- Purchase of a raffle ticket or other chance to win a prize, including amount paid for silent auction prizes.
- Purchase of merchandise, goods or services.
- Donations provided in exchange for advertising/sponsorship.
- Gift certificates donated by the issuer.

For more information please visit [Charities and Giving](#).

Below is a more detailed list of what qualifies for a tax receipt:

Cheques - Donors to your event are only eligible for tax receipts if they donate directly to the Okanagan College Foundation (e.g. cheques written to 'Okanagan College Foundation'). We will make sure these donations are designated to the program or campaign that your fundraising event is supporting.

Cash - can be collected by you, deposited and exchanged for a bank cheque made payable to Okanagan College Foundation. You can drop off or mail the cheque to:

Okanagan College Foundation
1000 KLO Road
Kelowna, BC V1Y 4X8

IMPORTANT: If you are collecting donations by cash or cheque and wish to receive tax receipts for your donors, be sure to record:

- The donor's first and last name.
- Their home address.
- Their method of donation (cash or cheque).
- Please make cheques payable to the Okanagan College Foundation.
- The amount of their donation.

In order to be issued a charitable tax receipt, the gift must be submitted to the Okanagan College Foundation office within 30 days of your event.

Donations of less than \$20 will not be receipted.

Online - Online donations from your direct fundraising page will automatically receive tax receipts.

Event organizers must submit all donations within 30 days of their event and cheques made payable to the Okanagan College Foundation.

If you have any questions regarding what does or does not qualify for a charitable tax receipt, or how best to manage your event finances, please do not hesitate to ask one of the Okanagan College Foundation staff. Email us at foundation@okanagan.bc.ca.

PROMOTE YOUR EVENT

Now that you have a plan, it's time to let your friends, network and community know about it. Okanagan College Foundation has an account with Trellis, which can create an independent fundraising page for you.

You can share this page with your network and ask them to attend or donate to your fundraiser.

To promote your event, you can also consider:

- Sharing your event with the media.
- Posting your event on online community calendars (Castanet, Kelowna Now).
- Putting up posters at coffee shops and other spots in town.

Please read our [Guidelines for Use of Social Media](#) for tips on social media use.

For more information on use of logos and how to download please visit [Logo Downloads](#)

Section 2 - On the day

Below are some other things you will want to consider during your event:

- Assign someone you trust to be responsible for handling the donations.
- Have a Pledge Form available for donors.
- During your event, assign volunteers to tasks you feel they are best suited for.
- Take pictures - remember to click to get a Photo Release form.

Section 3 - After your event

After the event, make sure to congratulate yourself and your volunteers for hosting an event that benefits local students. Here are some other steps to complete your event:

- Thank the donors - this will make people feel engaged and that what they did made a difference.
- Compile all your donations and forms collected.
- Contact Okanagan College Foundation within a week of the event to let us know how it went and arrange to drop off any funds not raised online.
- Celebrate your success on social media! Make sure to tag us so that we can share the love back.

Resources

- Online Toolkit
- Policy Statement
- Guidelines for Social Media Use
- Cash Sheet
- Financial Summary
- Photo Release Form

Appendices

APPENDIX A – POLICY STATEMENT

- Please read through before completing the Event Request form.

APPENDIX B – EVENT REQUEST

- To be completed for all events prior to promoting the event.

APPENDIX C – PLEDGE FORM

- To be completed when used within 30 days of the event.

Thank you for making a difference in our students lives!
If you have any questions please contact:
foundation@okanagan.bc.ca | 250-862-5630 | 1-888-650-6968

Appendix A

Policy Statement

Third-party events that are related to the Okanagan College Foundation are an important component of Okanagan College's fundraising strategy. These events allow supporters, staff and students of Okanagan College to raise vital funds to support the transformative power of education. These events also help raise the profile of Okanagan College and the Okanagan College Foundation in the community. As such, it is important that the events reflect well on both the College and Foundation's reputations and that all parties are aware of their responsibilities by adhering to the following:

1. Resources

- The event organizer will provide staffing and volunteers associated with the planning and implementation of the event.
- The event organizer agrees to use its own mailing list for the event.
- If the event is cancelled, the event organizer will make every effort the Okanagan College Foundation no less than two weeks prior to the planned event date.

2. Third-party events must be approved by the Okanagan College Foundation in advance

- To conduct a fundraising event, we ask that you contact the Foundation team at foundation@okanagan.bc.ca, discuss the event, and complete a Third-Party Event Request.
- Okanagan College Foundation approval is required prior to hosting a third-party event. This is important as we track all events and donations to ensure you receive the recognition you deserve, as well as issue tax receipts where applicable.

3. Promotion

- All third-party events and must align with Okanagan College Foundation mission and charitable objectives.
- The Okanagan College Foundation logo is a registered trademark; unauthorized use is prohibited.
- The Okanagan College Foundation must approve of all promotional/advertising copy featuring our name and logo.
- All promotional materials must state that the event is "in support" of the Okanagan College Foundation and is not an official Okanagan College Foundation event.
- All photographs or images in promotional materials must be respectful and portray a positive message.
- The third-party organizer agrees to ensure that all materials borrowed are returned promptly and in the same condition they were received.
- Okanagan College Foundation would appreciate written information or photographs from the event which may be included in our publications. Photo release forms should be completed accordingly by event organizers and attendees. A copy of the photo release form is included in the Third-Party Event Package found here.
- Okanagan College Foundation agrees to provide the third-party event organizer with the appropriate recognition.
- Okanagan College Foundation reserves the right to withdraw the use of its name.

4. Event expenses, revenues and tax receipts

- Event expenses may not be paid from tax-receiptable donations.
- No cost or liability associated with this event shall be incurred by the Okanagan College Foundation.
- The Okanagan College Foundation issues official income tax receipts in accordance with Canada Revenue Agency guideline.
- The final decision to issue official tax receipts rests with the Okanagan College Foundation.
- All donations requiring a tax receipt must be received in full by the Okanagan College Foundation within 30 days of the event.

5. Okanagan College Foundation does not approve the following types of fundraising as part of third-party events:

- Commission based fundraising
- Events which promote the use of tobacco or vaping products
- Vending machine sales
- Soliciting funds door-to-door, through telemarketing, or through non-foundation internet methods

6. Licenses, permits and insurance

- The third-party event organizer is responsible for meeting all municipal/provincial or federal standards and fulfill all legal authorization(s), permit(s), license(s), precaution(s).
- Third-party event organizers are required to arrange for appropriate insurance coverage for the event. By accepting the terms and conditions set forth in this application, the event organizer(s) clearly understand that they are accepting responsibility for claims that may arise as a result of the event.

7. Representatives from the Okanagan College Foundation will receive complimentary tickets or admission when invited to attend and/or speak at a third-party event.

8. Privacy / Ability to Contact Donors and/or Event Attendees

The Okanagan College Foundation may collect information to contact donors and/or attendees to third-party events to provide feedback on events, ensure appropriate gift recognition and sustain ongoing relationships building. Donors/attendees will be provided the opportunity to opt out from communications.

Appendix B

Third-Party Event Request

Thank you for your interest in supporting the Okanagan College Foundation. If you, or your organization, wish to host a special event or program to benefit the Okanagan College Foundation, we request you complete this proposal and submit to the Foundation for approval. Once the event has been officially approved, a signed copy of the attached agreement form will be forwarded to the applicant. If you have any questions concerning this application or the agreement, please contact the Foundation team at foundation@okanagan.bc.ca

NOTE: Application must be approved by the Okanagan College Foundation prior to publicizing or holding event.

Contact Information:

Name of sponsor/sponsor organization planning the event:

Please select the category that best describes you:

Corporation

School

Community

Service Club

Individual

Contact name:

Mailing address:

City: _____ Postal code: _____

Phone (business): _____ Phone (home/cell): _____

Email: _____

Event Information:

Name of Event: _____

Type of Event:

One-Time Annual Ongoing

Date of Event: _____

Location of Event: _____

Date contribution to the Okanagan College Foundation is expected: _____

Target Market:

Family/Friends Members Customers General Public

Event Details:

Briefly describe the event and how the funds will be raised (if you have done a similar event for the Okanagan College Foundation in the past, it is not necessary to complete this section).

Support Provided by the Okanagan College Foundation:

Please indicate if you require any of the following promotional tools from the Foundation.

- Event listed on Okanagan College Foundation website (based on space and lead time)
- Promotion to Okanagan College employees
- Banner (pop-up stand)
- Representation or a speaker at the event
- Social media promotion
- Press Release (assist)

*Please provide a short promotional description - including contact details, event location, dates, and times. For us to fulfill your request for support, a minimum of two weeks' notice prior to the start of your event/campaign is recommended.

Public Relations Information:

Briefly describe the proposed publicity plan for the event/program.

Will the publicity be handled by a professional agency? Yes No

If yes, please name the agency: _____

Will promotional materials, such as flyers and posters, be printed? Yes No

If yes, please indicate the extent of distribution and dates of release: _____

Does your organization plan on using the name of the Okanagan College Foundation in your printed materials and in your publicity? Yes No

Please note: All materials featuring the name of the Okanagan College Foundation must be approved by the Foundation before publication.

Third-party Event Policies

Third-party Events are a very important component of the fundraising activities of the Okanagan College Foundation. Beyond the funds raised, these events create awareness about the College and bring new support to the Foundation.

To ensure third-party events have a positive impact on the College's public image, the following policies need to be followed:

1. The Okanagan College Foundation logo is a registered trademark; unauthorized use is prohibited.
2. Official tax receipts will only be used in accordance with the Canada Revenue Agency guidelines. The final decision to issue official tax receipts rests with the Okanagan College Foundation.
3. Event expenses may not be paid from tax-receiptable donations. All donations requiring a tax receipt must be received in full by the Okanagan College Foundation.
4. Whenever possible, the Foundation would appreciate written information or photographs which may be included in our publications.
5. The Okanagan College Foundation does not approve the following types of fundraising:
 - a. Programs that involve a professional fundraiser, telemarketing and/or an agreement to raise funds on a commission, bonus or percentage basis (except for cause-related marketing programs developed with corporate partners).
 - b. Events which promote the use of tobacco or vaping products.
 - c. Vending machine sales.
 - d. Soliciting funds door-to-door, through telemarketing, or through non-foundation internet methods.
6. Representatives from the Okanagan College Foundation will receive complimentary tickets or admission when invited to attend and/or speak at a third-party event.
7. Terms and conditions with respect to insurance coverage:
 - e. The Okanagan College Foundation's special/sporting event insurance policy does not extend to third-party events. Third-party event organizers are required to arrange for appropriate insurance coverage for the event. By accepting the terms and conditions set forth in this application, the event organizer(s) clearly understand that they are accepting responsibility for claims that may arise because of the event.

AGREEMENT for Special Event or Program benefiting the Okanagan College Foundation, the **SPONSORING ORGANIZATION**, agrees to organize and implement a special event/program, to benefit the Okanagan College Foundation. The special event/program shall be described and referred to publicly as follows:

- The SPONSOR agrees to use only the authorized name of the Okanagan College Foundation in any media and printed materials related to the special event (if name is to be used).
- No cost or liability associated with this event shall be incurred by the Okanagan College Foundation.
- The Okanagan College Foundation agrees to provide the SPONSOR with the appropriate recognition.
- The SPONSOR agrees to handle any monetary transactions and to present the proceeds to the Okanagan College Foundation within 30 days following the event.
- The SPONSOR will provide staffing and volunteers for the special event.
- The SPONSOR agrees to use its own mailing list for the special event.
- The SPONSOR will obtain all necessary permits, licenses or insurance.
- The SPONSOR agrees to follow the Okanagan College Foundation's receipting policies that adhere to the Canada Revenue Agency.
- The Okanagan College Foundation reserves at any time the right to withdraw the use of its name.
- If the event is cancelled, the sponsor will notify the Okanagan College Foundation two weeks prior to the original event day.

I have read and will adhere to Okanagan College Foundation Third-Party Policy Statement at Appendix A of this form.

Signed: _____ Date: _____
Sponsor

Signed: _____ Date: _____
Okanagan College Foundation

Please return the completed form to:

Okanagan College Foundation
1000 KLO Road
Kelowna, BC V1Y 4X8
Email: foundation@okanagan.bc.ca

Privacy Statement:

The Okanagan College Foundation is committed to protecting the privacy of personal information in our possession; the information collected on this form will be used by Foundation staff strictly to contact you about this event. If you have any questions about our privacy statement, please contact us at foundation@okanagan.bc.ca

Appendix C

Pledge Form

Fundraiser Information

Name of Fundraising Event

Date: _____

Contact: _____

Donor Information

- Donor's name and address must be complete to receive a tax receipt
- Charitable tax receipts will be issued for any gift of \$20 or greater
- Please make cheques payable to Okanagan College Foundation
- Charitable Registration #

First Name _____ Last Name _____ This gift is <input type="checkbox"/> Personal <input type="checkbox"/> Corporate _____ Business Name _____ Address _____ City _____ Prov _____ PC _____ Phone _____ Email _____ <input type="checkbox"/> Cash <input type="checkbox"/> Cheque <input type="checkbox"/> Credit Card # _____ Exp ____/____ Cardholder Name _____ Signature _____	Donation Amount (\$)
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First Name _____ Last Name _____ This gift is <input type="checkbox"/> Personal <input type="checkbox"/> Corporate _____ Business Name _____ Address _____ City _____ Prov _____ PC _____ Phone _____ Email _____ <input type="checkbox"/> Cash <input type="checkbox"/> Cheque <input type="checkbox"/> Credit Card # _____ Exp ____/____ Cardholder Name _____ Signature _____	Donation Amount (\$)
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