



Approved By	Board of Directors
Committee Oversight	Resource Development / Public Relations
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THIRD PARTY FUNDRAISING POLICY

Policy Statement:

The Stratford General Hospital Foundation (Foundation) recognizes the invaluable role of third-party fundraisers (TPF) in supporting our mission. It is imperative that the Foundation partners with the community ensuring the success of a third party fundraiser. We are committed to ensuring that all third party fundraising activities, whether through special events, campaigns, or other initiatives, are conducted in a manner that reflects our values of commitment, integrity, accountability and excellence. All third party fundraising activities must comply with legal and regulatory requirements, including those set out by the Canada Revenue Agency (CRA), and align with the Foundation's purpose. Through clear guidelines and open communication, we seek to foster positive and mutually beneficial relationships with third-party organizers while ensuring the responsible stewardship of all funds raised.

Purpose:

The purpose of this policy is to establish guidelines for the planning, approval, and execution of third-party fundraising activities organized in support of the Foundation. This policy aims to ensure that third party fundraising initiatives are conducted ethically, align with our purpose, and comply with legal and regulatory standards. By setting clear expectations for integrity, accountability, and effective stewardship, the policy ensures that the Foundation's reputation is maintained and that funds raised are used to further our charitable objectives.

POLICY

Guiding Principles for Third Party Fundraising

- **Collaborative Commitment:** The Foundation is committed to collaborating with TPFs who demonstrate a strong commitment to our community and to supporting the Foundation's purpose.

- **Integrity:** All fundraising activities must be conducted in a manner that upholds the integrity of the Foundation, respects our donors, and is transparent in its financial operations.
- **Accountability:** The Foundation must be kept informed of event details, progress, and results. Event organizers are required to submit financial reports, participant numbers, and details of all funds raised.
- **Legal Compliance:** All events must comply with all applicable federal and provincial laws and regulations governing fundraising for charitable organizations, including those related to tax receipts, privacy, and consumer protection.
- **Mission Alignment:** All events clearly support and advance the Foundation's mission, ensuring that the activity does not conflict with the Foundation's reputation or public image.

Definitions

- **Third Party Fundraising:** Any fundraising activity or event conducted by an individual, group, or organization other than the Foundation's staff, board, or the Volunteers of Stratford General Hospital where the Foundation is named as the beneficiary.
- **Fundraising Proposal:** A written request submitted by a TPF to the Foundation, outlining the details of the proposed fundraising activity.
- **Fundraising Agreement:** A written agreement between the Foundation and the TPF, outlining the terms and conditions of the fundraising activity.
- **Third Party Event Toolkit:** A document highlighting best practices in organizing and hosting a successful community fundraising event.

PROCEDURES

Proposal Submission

- To conduct a third party fundraising activity for the benefit of the Foundation the TPF must complete the Fundraising Proposal form provided by the Foundation and submit the application a minimum of six weeks prior to the event
- The Fundraising Proposal must include the following information:
 - Contact information of the Third Party Fundraiser(s).
 - Description of the proposed fundraising activity (e.g., event, campaign).
 - Date, time, and location of the activity.
 - Fundraising goal.
 - Budget for the activity (including estimated expenses and revenue, if applicable).
 - Plan for collecting and remitting funds to the Foundation.
 - Marketing and promotion plans.
 - Any other information deemed relevant by the Foundation.

Proposal Review and Approval

- The Foundation will review the Fundraising Proposal to ensure that it aligns with the Foundation's purpose and fundraising priorities.
- The Foundation reserves the right to approve or reject any Fundraising Proposal at its sole discretion.
- The Foundation will notify the TPF in writing of its decision within 10 business days after submission.

Fundraising Agreement

- If a Fundraising Proposal is approved, the Foundation and the TPF will enter into a Fundraising Agreement.
- The Fundraising Agreement will outline the roles and responsibilities of each party, including:
 - Ethical Fundraising – Roles and Responsibilities
 - Recognition
 - Fundraising & Financial Reporting
 - Insurance and Liability
 - Event Promotion and Branding
 - Event Cancellation or Modification
 - Non-Discrimination and Ethical Standards
 - Confidentiality and Privacy Laws
 - Governing Laws and Dispute Resolution

Conduct of Fundraising Activities

The Foundation can assist in the event by providing:

- An Events Toolkit to aid in the success of the event;
- Advice and expertise on event planning;
- Online resources;
- A limited number of promotional items for the event;
- Subject to availability, staff or volunteers to support the event or represent the Foundation.

The TPF is responsible for:

- The planning and execution of their fundraising activities.
- Conducting all activities in a professional and ethical manner, in accordance with all applicable laws and regulations.
- Ensuring not to engage in any activities that could damage the Foundation's reputation.

Event Promotion & Branding

The Foundation will, upon request:

- Provide a letter of support to be used to validate the authenticity of the event and its organizers, if applicable.
- Provide informative materials about the Foundation such as newsletters, case statements and brochures.
- Help promote the event on the Foundation's social media channels, newsletters and website.
- Assist with press release announcing and/or promoting the event when possible.

Note: the Foundation will not provide donor mailing lists for the event.

The TPF will:

- Represent themselves as a TPF, rather than a direct arm of the Foundation.
- Use the Foundation's name and logo only when prior consent has been provided by the Foundation either in the Fundraising Agreement or through written correspondence.
- Will ensure the Foundation's name and logo will not be altered without prior permission from the Foundation.
- Not use the Foundation's name or logo in any way that implies endorsement of any product, service, or political party.
- Share all promotional and marketing materials for the fundraising activities prior to the event for review and approval by the Foundation.
- Ensure that all materials accurately represent the Foundation and the purpose of the fundraising activity.

Fund Collection and Remittance

- All funds raised must be remitted to the Foundation within 30 days or as specified in the Fundraising Agreement.
- It must be stated whether all, or a portion of, the event proceeds are supporting the Foundation in all public communications about the event.
- The TPF must provide a detailed accounting of all funds raised and expenses incurred.
- When deemed appropriate by the Foundation, the issuing of official donation receipts in accordance with Canada Revenue Agency (CRA) guidelines, and only for eligible donations made directly to the Foundation, can be considered.
- The Foundation is solely responsible for issuing tax receipts. The TPF cannot issue tax receipts.

Financial Responsibility

- The Foundation is not responsible for any financial losses or liabilities incurred in connection with the TPF's fundraising activities.
- The TPF are responsible for all expenses associated with their fundraising activities, unless otherwise agreed upon in writing with the Foundation.

Event Liability

The Foundation assumes no liability for third party events including but not limited to:

- Insurance and applicable licensing requirements.
- Sponsorship obligations/fulfillment.
- Expenses incurred due to event cancellation/postponement/underperformance.

The TPFs will ensure:

- The event has appropriate insurance coverage, including liability.
- The event adheres to health and safety regulations, including crowd control, accessibility considerations, and emergency response protocols. The Foundation encourages organizers to consider environmental sustainability practices where possible.

Acknowledgement and Recognition

- The Foundation will acknowledge and recognize the contributions of TPF as outlined in the Fundraising Agreement.
- The level of recognition will be determined based on the nature and extent of the fundraising activity and in accordance with the Foundation's recognition policies.

Confidentiality and Privacy

- TPFs must maintain the confidentiality of all donor information and comply with all applicable privacy laws, including the Personal Information Protection and Electronic Documents Act (PIPEDA).
- TPF must not use donor information for any purpose other than that specified in the Fundraising Agreement.

Termination

- The Foundation may terminate the Fundraising Agreement at any time if the TPF fails to comply with the terms and conditions of this policy or the Fundraising Agreement, or if the Foundation determines that the fundraising activity is not in its best interest.
- The TPF may terminate the Fundraising Agreement with reasonable written notice to the Foundation.

Conflict Resolution

- In the event of a dispute or issue regarding the third party event, the Foundation will work with the organizers to resolve the matter in a fair and timely manner. If necessary, an impartial third party may be consulted to help mediate the resolution.

REVIEW

This policy will be reviewed every two years by the Resource Development/Public Relations Committee to ensure that the Foundation continues to comply with charitable laws, regulations, guidelines, and best practices.

In the interim, this policy may be revised or rescinded if the Strategic Planning/Nominating Committee deems fit.

RELATED POLICIES

Donor Recognition Policy
Ethical Fundraising Practices Policy
Gift Acceptance Policy
Privacy Policy