



The Hastings and Prince Edward
Learning Foundation

**FOR SCHOOLS,
STUDENT GOVERNMENTS
AND THIRD PARTY FUNDRAISERS
WHEN CHARITABLE RECEIPTS
ARE REQUESTED**

**THE LEARNING FOUNDATION
FUNDRAISING AGREEMENT
AND
FUNDRAISING APPLICATION**

**TO BE USED IN CONJUNCTION WITH ALL
HASTINGS AND PRINCE EDWARD DISTRICT
SCHOOL BOARD POLICIES AND PROCEDURES**

The Hastings and Prince Edward Learning Foundation Fundraising Agreement

Thank you for your interest in supporting Hasting and Prince Edward District School Board students. We want your fundraising activity to be successful and we will do what we can to help you, including:

- Offer advice on your fundraising plan
- Provide a letter of authorization to validate the authenticity of the event
- Assist you in designating your contribution to a specific area
- Provide tax receipts to donors (minimum \$20 donation)

(Please record donations on a Hastings and Prince Edward Learning Foundation (HPELF) donation/pledge form.)

Guidelines

1. The completed application signed by the principals of the fundraising organization must be submitted to the HPELF no less than one month prior to the proposed commencement of the fundraising activity. Foundation approval will be granted on a per program/project/event basis. Each program/project/event must be approved for each year that it continues.
2. The Foundation may deny any application for any fundraising activity that does not comply with the policies, procedures, goals and objectives of the Foundation and the HBEDSB (Board).
3. The Foundation must give its permission in writing for the use of the Foundation's name, logo or any other identifying symbol to be used in conjunction with the program/project/event. Once approval has been given in writing, the Foundation will provide a copy of its logo via E-mail. The Foundation must approve in advance all advertising, marketing and/or publicity that is intended for distribution to the general public. Copies of any external public promotional materials must be submitted to mdesnoo@hpedsb.on.ca or faxed to 613-968-1038 Attn: Maribeth deSnoo prior to publication.
4. Any promotional material or publicity shall not imply or suggest that the program/project/event is sponsored or co-sponsored by the Foundation. The event name must be followed by "in support of" or "proceeds to" or similar wording approved by the Foundation followed by the program/project/event name.
5. The public should be informed as to how the Foundation and the Board will benefit from the program/project/event. If the Foundation will not receive all of the proceeds, the exact percentage of benefits to be received by the Foundation should be stated clearly on all related publicity and promotional material.
6. The Foundation must be informed if another organization will benefit financially from the program/project/event. Only non-profit organizations may receive a licence to conduct a raffle and licences are required for all raffles. As such, any person or organization that is not authorized by the Foundation cannot conduct a raffle on behalf of the Foundation.
7. Neither the Foundation nor the Board or any of its officers, employees or trustees of the Foundation or the Board are responsible for any injury, loss or damage sustained by any volunteer or participant in the program/project/event.
8. The organizers of the program/project/event agree, in consideration of receiving the Foundation's assistance and authorization to use the Foundation's logo, to indemnify and save harmless the Foundation and the Board and their Trustees, officers, directors and employees from any and all claims, loss, or damages that may arise from or as a result of the program/project/event.
9. The organizers of the program/project/event are solely responsible for the planning, promotion and management of the program/project/event. This may include soliciting prizes, organizing publicity and providing goods and services. The Foundation may provide guidance and support when needed.
10. The organizers must ensure that none of their officers, employees, agents, partners, volunteers, contractors or associates represent or hold themselves out as having any authority to act on behalf of the Foundation or the Board. In the event such a representation is made, the organizers agree to indemnify and save harmless the Foundation and the Board and their respective officers, directors, employees and trustees from any loss, claim or damages that may be incurred by the Foundation or the Board arising from or as a result of the representation.
11. All income and expenditure reports for the program/project/event shall be submitted along with a cheque or money order within 28 days of the completion of the program/project/event.
12. All funds raised in the program/project/event shall be spent within twelve (12) months of the completion of the program/project/event.
13. The Foundation reserves the right to withdraw its approval and support for the program/project/event at any time if, in the Foundation's sole opinion, the program/project/event does not comply with any of the policies, procedures, goals or objectives of the Foundation or the Board.

SCHOOL STAFF/SCHOOL COUNCILS/STUDENTS

Please ensure that all donation cheques received are issued directly to the Hastings and Prince Edward Learning Foundation (HPELF) with a note on the bottom of the cheque listing the program and/or project that is being supported.

Donation Receipting

Financial Donations

The Hastings and Prince Edward Learning Foundation will issue donation receipts for income tax purposes for any cash, cheque or credit card donation of \$20 or more unless otherwise discussed and agreed upon. If an individual has made a donation, the receipt will be issued in the name of that individual at their home address. If a corporation has made the donation, and if a tax receipt is requested, the receipt will be issued in the company name at their corporate address. An individual or corporation cannot receive a donation receipt for money that was not donated by them (i.e. and individual cannot be designated to receive the donation receipt for monies raised through a casual day event).

Tax receipts cannot be provided if the donor received a benefit in return for the donation, eg. An opportunity to win a prize, or a benefit included in the price of admission such as dinner or golf. In the later example, receipts could be provided for any amount that is over and above the fair market value of the benefits received assuming the value of the benefits does not exceed 80% of the price of admission.

Any individual or business donors requiring tax receipts should have their donor details and donation amount included on The Learning Foundation donor form.

In Kind Donations (i.e. prizes, products, equipment)

A tax receipt can be issued for donations of in-kind equal to the fair market value of the property donated. To process in-kind donations The Hastings and Prince Edward Learning Foundation needs a written invoice or other supporting documents that could ascertain the fair market value of the in-kind donation. Gift Certificates and services are not eligible for tax receipts.

Sponsors

Corporations or businesses that agree to sponsor a program/project/event will receive an invoice or Thank you letter from The Hastings and Prince Edward Learning Foundation enabling them to claim back the full amount of their sponsorship as a marketing expense



FUNDRAISING AGREEMENT

I
(Chair/coordinator of the project/program/event fundraiser)
accept the terms and conditions of the Fundraising Agreement set out in the Fundraising Guidelines.

and:

- 1) agree to conduct my program/project/event accordingly.
- 2) To save and hold harmless the HPELF and all entities from any and all liability.

Signed Date

Thank you for your support. Please complete and return this Fundraising Agreement together with the attached Fundraising Application form to:

Maribeth deSnoo
Executive Director
The Hastings and Prince Edward Learning Foundation
156 Ann Street
Belleville, Ontario
K8N 3L3
Phone: 613-966-1170 ext. 2205
Fax: 613-968-1038

Also refer to Hastings and Prince Edward District School Board Policies and Procedures (hpedsb.on.ca/policiesprocedures) including but not limited to:
560 – Use of Electrical Equipment and Vending Machines in Board Buildings
556 – School Yard Improvement Areas and Playground Equipment



FUNDRAISING APPLICATION FORM

The Hastings and Prince Edward Learning Foundation is grateful for the support of generous people and businesses. To enable The Hastings and Prince Edward Learning Foundation to keep in touch with its supporters and to comply with its legal obligations, The Hastings and Prince Edward Learning Foundation keeps a register of fundraising events in support of The Hastings and Prince Edward Learning Foundation, and the Hastings and Prince Edward District School Board's programs/projects/events. Once this fundraising plan has been approved, a signed copy of the attached agreement form will be forwarded to the applicant.

Please indicate if this is in support of a:

YES NO school based (student/school council) fundraising for a redevelopment project (i.e. track, playground). Please make sure all donor cheques are made payable to the HPELF

YES NO school based fundraising special event (i.e. fun fair, auction etc.) Please make sure all donor cheques are made payable to the HPELF

YES NO a third party fundraiser (A third party fundraiser can be defined as any fundraising initiative brought forward by an individual(s), community groups, service club, or business external to the Hastings and Prince Edward District School Board and The Hastings and Prince Edward Learning Foundation who wish to raise money through a planned activity that is designed, managed and financially resourced by external participants.)

Will tax receipts be required? YES NO MAYBE/UNSURE
(Please contact Maribeth deSnoo @ 613-966-1170 x2205)

Will other charitable organizations benefit from this program/project/event? YES NO

1. Program/Project/Event Information:

Name of individual/group/organization: _____

Contact Information:

Contact person: _____ Title: _____

Email: _____ Website: _____

Company: _____

Address: _____

Work #: _____ Cell#: _____ Home #: _____

2. Event Information:

Program/Project/Event Name: _____

Program/Project/Event Description: _____

Date & Time of Event: _____ Number of guests/attendees: _____
Day/Month/Year

Proposed fundraising timeframe if an ongoing project: _____

Location and Address: _____

Target Market (general public, customers, family/friends):

Is this the first year for your program/project event? YES NO

If no, please specify in what years previous funds were raised. _____

Will proceeds from your event be donated exclusively

a) YES NO through The Hastings and Prince Edward Learning Foundation to benefit
_____program
(i.e. school or playground, track, etc.)

b) YES NO to The Hastings and prince Edward Learning Foundation _____
fund. (i.e. Student Emergency Fund, Food For Learning, Science Fair, etc.)

Please make sure all donor cheques are made payable to the HPELF.

How will the program/project/event be publicized?

How will funds be raised? (*check all that are applicable*)

_____ Cash Donations _____ Event Sponsorship _____ Live/Silent Auction
_____ Merchandise Sales _____ Pledges _____ Raffle
_____ Ticket Sales _____ Other Sources of Revenue _____

How will the proceeds be sent to The Hastings and Prince Edward Learning Foundation?

_____ Cash _____ Individual Cheques _____ School Cheques (third party)
_____ Visa/Mastercard _____ Organization Cheque

1. Program/Project/Event Details:

Total Projected budget: \$ _____

Financial Fundraising Information:

Total projected gross revenue (before expenses) \$ _____

Total projected Expenses: & _____ Insurance: \$ _____

Printing: \$ _____ Licenses: \$ _____

Rentals: \$ _____ Prizes: \$ _____

Other: (please list): _____

Estimated Date of Donation to the Hastings and Prince Edward Learning Foundation: _____

2. **Grant applications:** (please list eg. Hydro One, Stark Family Fund, etc.)

Amount to be requested.

\$ _____	_____
\$ _____	_____
\$ _____	_____
\$ _____	_____
\$ _____	_____

All grant funds received must be spent within the year.

Chair/Coordinator Signature

HPELF Signature

Date

Income and Expenditure Report
(to be completed at the end of the campaign/project/event)

1. **Event Information:**

Program/Project/Event Name: _____

2. **Program/Project/Event Information:**

Name of individual/group/organization: _____

Contact Information:

Contact person: _____ Title: _____

Email: _____ Website: _____

Company: _____

Address: _____

Work #: _____ Cell#: _____ Home #: _____

Date of Project/Program/Event: _____

How were funds raised? (*check all that are applicable*)

_____ Cash Donations	_____ Event Sponsorship	_____ Live/Silent Auction
_____ Merchandise Sales	_____ Pledges	_____ Raffle
_____ Ticket Sales	_____ Other Sources of Revenue	_____

Have funds for individuals/organizations/businesses requiring charitable receipts been forwarded to The Learning Foundation: Yes No

How were the proceeds sent to The Learning Foundation?

_____ Cash	_____ Individual Cheques	_____ School Cheques (third party)
_____ Visa/Mastercard	_____ Organization Cheque	

Total Projected budget: \$ _____

Total Projected gross revenue: \$ _____

Total Projected expenses: \$ _____

Actual Financial Fundraising Information:

Gross revenue (before expenses) \$ _____

Expenses: \$ _____

Insurance: \$ _____

Printing: \$ _____

Licenses: \$ _____

Rentals: \$ _____

Prizes: \$ _____

Other Expenses incurred, please list and the expense amounts:

_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____

* (Individual expenses should equal your total expenses)

Grant applications submitted and funds received: (please list eg. Hydro One, Stark Family Fund, etc.)

Amount Received	Donor
\$ _____	_____
\$ _____	_____
\$ _____	_____
\$ _____	_____
\$ _____	_____

* (All funds raised must be spent within the year.)

Chair/Coordinator Signature

HPELF Signature

Date Submitted: _____

Date Received: _____

Date Reviewed: _____

THE HASTINGS AND PRINCE EDWARD LEARNING FOUNDATION DONOR TRACKING FORM



This form belongs to: _____

Name of Donor	Phone #	Mailing Address With Postal Code	Donation Amount	Receipt Required
John Smith	613-555-1234	123 Any Street Belleville, Ontario K8N 1N9	\$ 20.00 <input checked="" type="checkbox"/> cash <input type="checkbox"/> cheque	✓
			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	
			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	
			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	
			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	
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			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	

A charitable tax receipt will be provided for donations of \$20 or more if requested.

Please make cheques payable to The Hastings and Prince Edward Learning Foundation with a notation at the bottom of the cheque, noting the program you are supporting.

If you wish to donate by credit card, you may do so by calling:
The Hastings and Prince Edward Learning Foundation at 613-966-1170 x2205
 Please indicate the program which you are supporting.

THANK YOU FOR YOUR DONATION!