

THIRD-PARTY FUNDRAISING TOOLKIT

The Bridge Youth & Family Services Society



WELCOME AND THANK YOU.

By putting on a fundraiser for The Bridge Youth & Family Services - whatever the size or scope - you will help transform the lives of people in our community.

Why support The Bridge?

By inviting your friends, family, coworkers and neighbours into the story, you will help further our mission to inspire healthy communities and resilient people. Together, we will strengthen communities, families and people.

How will the funds be used?

You can determine what programs or areas of need your fundraiser will support – or you can leave it open so that we may designate the funds to our current priority projects. Currently, our primary fundraising campaign is for the Phase II Okanagan Youth Recovery House. This \$10 million campaign will build a home away from home where youth can focus on self improvement by way of building connections.

Some other programs and areas of need are listed below:

1. Greatest Need
2. Etcetera Youth Group
3. Beyond the Blues Postpartum Support Group

**WE LOOK
FORWARD TO
WORKING WITH YOU!**

TRANSFORM LIVES. BUILD COMMUNITY.

The Bridge's Third Party Fundraising Toolkit provides you with a step-by-step guide on how to organize a fundraiser that can make a valuable contribution to the vital work we're doing in the community. We're so grateful for people like you who share a vision for a resilient community where everyone thrives.

THANK YOU for hosting a fundraiser on behalf of The Bridge.

Table of Contents

The Youth Recovery House
How Third-Party Fundraising Works
Fundraiser To-Do List
Licenses and Insurance
Tax Receipts
How To Submit Funds Raised
FAQ
SAMPLE Donation Form
SAMPLE Photo Release Form

**THANK YOU
FOR WANTING TO MAKE
A DIFFERENCE IN OUR COMMUNITY!**

Let's Build This House Together



**Our current priority
fundraising campaign is
Phase II Okanagan Youth
Recovery House.**

With more individuals, businesses, and organizations joining us each day, we are rallying the community to take action to generate the resources and funds necessary to create a safe, healing space for our children to receive the individualized care they need without having to leave their home community and family.

Phase II is a purpose-built, nature-based facility that will be a legacy in our community for years to come. It is a 9,500 square foot home built on 1-2 acres of property - large enough to house as many as 16 young people experiencing problematic substance use. This home away from home will

- Create the conditions for residents to embark on a process of change, which will improve their health and well-being, their ability to direct their own lives, and inspire them to reach their potential.
- Employ interventions that reflect the multi-dimensional nature of addiction and will impact the physical, social, environmental, psychological, cultural and spiritual circumstance of participants.
- Enable youth to foster healthy relationships and be reconnected with themselves, the community, with nature, and with those who genuinely care for their well-being.

Our fundraising goal is \$10 million dollars. The funds needed may change and evolve over time, depending on construction costs, donations of property and other support offered by the community.

We already have over \$1.2 million dollars dedicated to the campaign and our Board of Directors has committed the resources necessary to ensure that every dollar raised from donors is committed solely to bricks, mortar, and treatment.

Visit www.youthrecoveryhouse.ca to learn more.

HOW THIRD-PARTY FUNDRAISING WORKS

At The Bridge, Third Party Fundraising is a fundraiser organized and promoted by an external individual, group or company. The organizers act independently, but with The Bridge's knowledge and approval, and in some cases, direct support. Third-party fundraisers are an essential resource for helping raise funds and awareness that help us carry out our work in the community.

1. Come up with your idea. This is the fun part - how do you want to raise money for The Bridge?
2. Fill out and submit the application form. Our team will get back to you within to chat about your fundraiser.
3. Have your fundraisers Have fun, take pics, and share online - show the community how much you care by using the power of social media
4. Report back - tell us how much you raised for The Bridge and be sure to drop off the funds.

WE ASK THAT ALL FUNDRAISERS BEING HELD TO SUPPORT THE BRIDGE ALIGN WITH OUR MISSION, VISION, VALUES.

If you have any questions, please contact:

Kelly Paley, Director of Community Engagement
P: 250 763 0456 ext. 2224
E: kelly.paley@thebridgeservices.ca
#8 - 2604 Enterprise Way
Kelowna, BC V1X 7Y5

A FEW IDEAS:

AUCTION
DINNER PARTY
BATTLE OF THE BANDS
DONATIONS IN LIEU OF GIFTS
BENEFIT DINNER
FACE PAINTING
GARAGE SALE
BOOK SALE
GRAND OPENING
CAR WASH
% OF SALES

BBQ
PET WASH
CARNIVAL/FESTIVAL
ROUNDUP @ CASHIER
SPECIAL PRODUCT
CONCERT/PLAY
RAFFLE
CONCESSION STAND
YARD SALE
CRAFT SALE
SCAVENGER HUNT

THIRD-PARTY FUNDRAISER TO-DO LIST

Planning a fundraiser is easy if you're organized. Use these step-by-step checklists to ensure you don't forget anything that could help make your fundraiser a success.

BEFORE YOUR FUNDRAISER

- Brainstorm fundraising ideas - refer to our fundraising ideas to get started.
- Check into any possible safety or legal issues (raffle license, insurance etc.).
- Determine how many people you will need to help you execute your plan.
- Complete the Third-Party Fundraiser Application and Agreement Forms
- Recruit volunteers – friends, family, colleagues or other motivated people.
- Check & see if your employer has a matching gift program. Many employers sponsor matching gift programs and will match any charitable contributions made by their employees.
- Plan your budget.
- Find a suitable location.
- Schedule your fundraiser.
- Promote your fundraiser.

AT YOUR Fundraiser

- During your fundraiser assign someone you trust to be responsible for handling the donations.
- Have a Donation Collection Sheet available for donations.
- Take pictures (remember to get photo releases)
- Spread the word on social media

See sample forms at the end of the toolkit!

AFTER YOUR Fundraiser

- After your fundraiser collect the funds, thank your donors, volunteers, and supporters.
- Compile all of your donation forms and money collected.
- Drop off at The Bridge within 30 days of the fundraiser.
- Celebrate your success on social media - Make sure to tag us so that we can share the love back.

LICENSES AND INSURANCE

Depending on the nature of your fundraiser 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. The Bridge Youth & Family Services) that acknowledges the fundraiser, 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 Bridge.
- 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, you'll need a [Special Event Permit \(SEP\)](#).

Other Common Licenses and Permits:

- Outdoor Event Permits for City-owned properties.
- Temporary Food Service Permits from Interior Health.
- SOCAN Licenses for publicly played music.

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

The Bridge's special/sporting event insurance policy does not extend to third-party fundraisers. Third-party organizers are required to arrange for appropriate insurance coverage for their fundraiser. The fundraiser organizer accepts responsibility for claims that may arise because of their fundraiser.

TAX RECEIPTS

The Bridge Youth & Family Services 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 fundraiser are only eligible for tax receipts if they donate directly to The Bridge. For example:

- Cheques - Donors to your fundraiser are only eligible for tax receipts if they donate directly to The Bridge (e.g. cheques written to 'The Bridge Youth & Family Services'). We will make sure these donations are designated to the program or campaign that your fundraiser is supporting.
- Cash - can be collected by you, deposited and exchanged for a bank cheque made payable to The Bridge Youth & Family Services. You can drop off or mail the cheque to: The Bridge, #8 - 2604 Enterprise Way, Kelowna, BC V1X 7Y5
- Online - Online donations from your direct fundraising page will automatically receive tax receipts when eligible.

IMPORTANT: If you are collecting donations by cash or cheque and wish to receive tax receipts for your donors, be sure the gift is submitted to our offices within 30 days of the fundraiser and you've recorded:

- The donor's first and last name.
- Their home address.
- Their method of donation (cash or cheque).
- The amount of their donation.
- Please make cheques payable to The Bridge Youth & Family Services.

See sample forms at the end of the toolkit!

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](#).

Donations of less than \$10 will not be receipted.

Fundraiser organizers must submit all donations within 30 days of their fundraiser and cheques must be made payable to The Bridge Youth & Family Services. If you have any questions regarding what does or does not qualify for a charitable tax receipt, or how best to manage your fundraiser finances, please do not hesitate to contact Kelly Paley, Director of Community Engagement at 250 763 0456 ext. 2224 or kelly.paley@thebridgeservices.ca

HOW TO SUBMIT FUNDS RAISED

Online

- Coordinate with us to create a custom online donation form.

Mail

- Cheques can be mailed to The Bridge Youth & Family Services Attn: Director of Community Engagement #8 - 2604 Enterprise Way Kelowna, BC V1X 7Y5.

In-person

- You can drop off donations at our main office, #8 - 2604 Enterprise Way Kelowna, BC V1X 7Y5 between 9:00 am - 4:00 pm Monday to Friday or organize a convenient meeting place to connect.
- Don't forget to tell the staff at the office the name of your fundraiser and that it's a third-party fundraiser,

Please remember that if any of your donors want a tax receipt we need the individual's full legal name, address, contact details, method of donation, and amount of donation.

See sample
forms at the
end of the
toolkit!

Photo Op

- Connect with our Director of Community Engagement, Kelly Paley, at 250 763 0456 ext. 2224 or kelly.paley@thebridgeservices.ca to organize a cheque presentation.
- This is a great photo op for you to share with your community and social media.

THIRD-PARTY FUNDRAISER FAQ'S

WILL THE BRIDGE HELP ORGANIZE FUNDRAISERS?

Our Director of Community Engagement, Kelly Paley, is here to support you. We have created this Third-Party Fundraising Toolkit to guide you through hosting a successful fundraiser.

IS THE BRIDGE ABLE TO SUPPORT ANY THIRD-PARTY FUNDRAISER EXPENSES?

It is the responsibility of the fundraiser organizers to create a budget and manage it accordingly for all expenses. Make sure you keep it simple.

WHAT HAPPENS IF I DON'T RAISE ENOUGH FUNDS TO COVER MY EXPENSES?

We understand fundraisers don't always go the way we hope, so we ask that you reach out to our Director of Community Engagement, Kelly Paley, who will be happy to coordinate a plan with you.

CAN THE BRIDGE PROVIDE VOLUNTEERS FOR A THIRD-PARTY FUNDRAISER?

It is the responsibility of the fundraiser organizers to recruit, train and manage all volunteers. In some circumstances, Bridge volunteers may be available to assist.

DO YOU HAVE FLYERS AND BROCHURES WE CAN HAND OUT?

Yes - We can provide material upon request.

DO YOU HAVE A BANNER WE CAN USE FOR OUR FUNDRAISER?

The Bridge will supply your fundraiser with signage that promotes your fundraiser in support of The Bridge. The signage must be returned after your fundraiser.

WHO IS RESPONSIBLE FOR ALL LIABILITY AND LEGAL RISKS ASSOCIATED WITH MY FUNDRAISER?

The Bridge will not be responsible for any damage or accidents to any persons or property; we will not assume any legal or financial liability caused before, during or after the fundraiser. In acquiring insurance for a fundraiser, it is the responsibility of the organizer to apply and obtain such documents in the name of the individual, organization or business coordinating the fundraiser. It is advisable that you seek guidance and direction from your own insurance broker on this matter.

WILL THE BRIDGE HELP PROMOTE THIRD-PARTY FUNDRAISERS?

Definitely - We will post your fundraiser on the calendar of our website as well as on social media. Any additional promotion is up to the fundraiser organizers.

HOW DO I SEND THE PROCEEDS OF MY FUNDRAISER TO THE BRIDGE?

Funds raised by a third-party fundraiser should be made payable and turned into The Bridge no later than 30 days after the fundraiser. Please review How To Submit Funds Raised for more information.

*If you have any questions, please contact: Kelly Paley, Director of Community Engagement
P: 250 763 0456 ext. 2224 E: kelly.paley@thebridgeservices.ca*

SAMPLE

THIRD-PARTY DONATION FORM

Fundraiser Information

Name of Fundraiser: _____

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 \$10 or greater that qualifies
- Please make cheques payable to The Bridge Youth & Family Services
- Charitable Registration #11922 1661RR0001

First Name: _____ Middle Initial: _____ Last Name: _____

This gift is Personal Corporate/Business Name _____

Address _____ City _____

Prov _____ Postal Code _____

Phone _____ Email _____

First Name: _____ Middle Initial: _____ Last Name: _____

This gift is Personal Corporate/Business Name _____

Address _____ City _____

Prov _____ Postal Code _____

Phone _____ Email _____

First Name: _____ Middle Initial: _____ Last Name: _____

This gift is Personal Corporate/Business Name _____

Address _____ City _____

Prov _____ Postal Code _____

Phone _____ Email _____

SAMPLE

THIRD-PARTY PHOTO RELEASE FORM

Please use a form similar to the one below to collect permission from fundraiser attendees and volunteers before publishing any photos of them:

Name: ----- Fundraiser: ----- Date: -----

NAME	SIGNATURE <small>(parent or guardian if under 19)</small>	PARENT / GUARDIAN NAME <small>(if under 19)</small>	EMAIL OR PHONE NUMBER

I hereby consent to and authorize the use and reproduction by The Bridge of all photographs taken of me at this fundraiser. I understand that The Bridge may use these photos for promotional material, educational activities, and fundraising both in print and in electronic form - for the benefit of the agency's programs.