



# The Hastings and Prince Edward Learning Foundation

Partnering Opportunities for Our Students

**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](mailto: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



The Hastings and Prince Edward  
Learning Foundation

Partnering Opportunities for Our Students

**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](http://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	
			\$ <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	
			\$ <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	
			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	
			\$ <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!**