



SCHOOL FUNDRAISING AGREEMENT

PARTICIPATING SCHOOL: _____

This project is a school based fundraising initiative where the proceeds will:

- Be returned to our school

Please describe what funds are being raised for:

- Support The Hastings and Prince Edward Learning Foundation programs

Please note which program this fundraiser will support (for example, Food for Learning, Student Emergency Fund, Nutrition Cupboards, area of greatest need)

1. Contact Information:

Name: _____

Title: _____

Email: _____

Phone Number: _____

2. Event Information:

Project/fundraising event name: _____

Date of event: _____

Location of event (if different than school): _____

- We would like a representative from The Hastings and Prince Edward Learning Foundation to attend our event

Project/fundraising event description:

3. Project/fundraising event Budget

Total Expected Revenue: \$ _____

Please describe how revenue will be collected (for example, sale of items, pledges, etc.)

Total Projected Expenses:

Please list costs:

Description:	Cost:
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Total Estimate Costs \$ _____

I have read, and agree to, the terms and conditions outlined in the attached Fundraising Agreement.

Signature, School Administrator: _____

Signature, Event Organizer: _____

Date signed: _____



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 Requested
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	
			\$ <input type="checkbox"/> cash <input type="checkbox"/> cheque	

A charitable tax receipt will be provided for donations of \$20 or more if requested. To be eligible for a tax receipt, the donor must provide a complete address and a phone number.

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 x62232

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. Please do not list children as donors, the person that actually provided the funds are to be listed as the donor.
- 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).
- To be eligible for a tax receipt, all donors must provide their name, address, phone number and donation amount on The Learning Foundation donor form.

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.

**** Please ensure that all donation cheques received are made out directly to The Hastings and Prince Edward Learning Foundation, with a notation indicating the program/project that is being supported.****

****For cash donations, where a tax receipt is required, the school must provide a spreadsheet which includes donor names, address, phone numbers and donation amount, reconciled to the total amount of cash being forwarded to The Learning Foundation. (sample attached)****

In Kind Donations (i.e. non-cash donations such as prizes, products, equipment)

A tax receipt can be issued for in-kind donations equal to the fair market value of the property donated. To process in-kind donations The Hastings and Prince Edward Learning Foundation needs a receipt, 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 a business receipt (not a charitable tax receipt). These will be forwarded to the participating school to distribute. Please acknowledge these donations with a thank you letter, along with the business receipt.



The Hastings and Prince Edward Learning Foundation Fundraising Agreement

Appendix B

GUIDELINES

1. The completed application signed by the principal must be submitted to The Hastings and Prince Edward Learning Foundation (HPELF) no less than one month prior to the proposed commencement of the fundraising activity. HPELF approval will be granted on a per program/project/event basis. If the program/project/event is an annual initiative, this agreement must also be approved annually.
2. Applications for any program/project/event that does not comply with the policies, procedures, goals and objectives of HPELF may be denied
3. The school will cover the postage costs associated with the provision of charitable tax receipts, as a rate of \$1.00 per tax receipt issued. This amount will be deducted from the total funds returned to the school.
4. HPELF must give its permission in writing for the use of HPELF'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, HPELF will provide a copy of its logo via E-mail. HPELF must approve in advance all advertising, marketing and/or publicity that is intended for distribution to the general public.
5. Any promotional material or publicity shall not imply or suggest that the program/project/event is sponsored or co-sponsored by HPELF. 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.
6. All proceeds of the program/project/event must benefit either HPELF, HPEDSB or the school hosting the activity
7. The public should be informed as to how HPELF, HPEDSB or your school will benefit from the program/project/event. If HPELF will not receive all of the proceeds, the exact percentage of benefits to be received by HPELF should be stated clearly on all related publicity and promotional material.
8. Only non-profit organizations may receive a licence to conduct a raffle and licences are required for all raffles. As such, only those authorized by HPELF can conduct a raffle on behalf of HPELF.
9. Officers, Directors, employees, or volunteers of HPELF will not be held responsible for any injury, loss or damage sustained by any volunteer or participant in the program/project/event.
10. The organizers of the program/project/event agree, in consideration of receiving HPELF's assistance and authorization to use the HPELF logo, to indemnify and save harmless HPELF and its 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.
11. 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. HPELF may provide guidance and support when needed.
12. 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 HPELF. In the event such a representation is made, the organizers agree to indemnify and save harmless HPELF and its respective officers, directors, and employees from any loss, claim or damages that may be incurred by HPELF arising from or as a result of the representation.
13. All funds raised through the program/project/event shall be submitted to HPELF within 28 days of the completion of the program/project/event.
14. HPELF reserves the right to withdraw its approval and support for the program/project/event at any time if, in HPELF's sole opinion, the program/project/event does not comply with any of the policies, procedures, goals or objectives of HPELF.

