



Third-Party

Fundraising TOOLKIT

OKANAGAN COLLEGE FOUNDATION



With the public's help, we will open the doors to a \$18.9-million state-of-the-art Health Sciences Centre on the College's Kelowna campus this year, ensuring students are learning in modern facilities and are well prepared to respond to our future health challenges.

Now, more than ever we realize the importance of well-trained health care professionals for ourselves, our loved ones and our community. With critical skills shortages in health care, Okanagan College students are essential to the future health and well-being of the region. A new Centre will help the College attract talent from across the province. Studies show students who do practicums locally are more likely to stay in the community after they graduate.

Many local champions are already stepping up to the plate to support this important cause as strategic investment in the future of health care. [Click here](#) for stories.

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Section 1: Planning a fundraising event

WHAT IS A THIRD-PARTY EVENT?

A third-party fundraising event is an event organized and promoted by an individual, group or organization. The organizers act

GET IN TOUCH!

If you have an idea and would like some input on the best way to proceed, please see Appendix A and read our Policy Statement before moving on to Appendix B, the Event Request Form. You can also contact us at foundation@okanagan.bc.ca. Our team is happy to discuss your idea and help you find ways to make it a success.

MAKING A PLAN

Once you have an event overview it's time to create a detailed plan. Please consider the following guideline:

CHOOSING A VENUE

Depending on your event, you may need to rent a space. You can find rental options by visiting sites like [Tourism Kelowna](#) or [Eventective](#).

VOLUNTEERS

Do you need volunteers to help organize and run the event? Decide what needs to be done to achieve success and start recruiting your friends, family and colleagues to fill those positions.

BUDGET AND FUNDRAISING GOAL

One of the most important aspects of a fundraiser is setting a fundraising goal and planning for how you hope to achieve it.

You will also need to factor in any expenses you might incur from the event. The Okanagan College Foundation is not liable for event expenses.

Below are some of the main things you may need to consider:

- Cash Sheet
- Financial Summary

LICENSES AND INSURANCE

Depending on the nature of your event 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. Okanagan College Foundation) that acknowledges the event, 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 Okanagan College Foundation.
- 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, click [Special Event Permit](#)

Other common licenses and permits required for events include Outdoor Event Permits for City-owned properties, Temporary Food Service Permits from Interior Health, and SOCAN Licenses for publicly played music.

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

Okanagan College Foundation's special/sporting event insurance policy does not extend to this event. Third-party organizers are required to arrange for appropriate insurance coverage for the event. The event organizer accepts responsibility for claims that may arise because of the event.

PROMOTE YOUR EVENT

Now that you have a plan, it's time to let your friends, network and community know about it. Okanagan College Foundation has an account with Trellis, which can create an independent fundraising page for you.

You can share this page with your network and ask them to attend or donate to your fundraiser.

To promote your event, you can also consider:

- Sharing your event with the media.
- Posting your event on online community calendars (Castanet, Kelowna Now).
- Putting up posters at coffee shops and other spots in town.

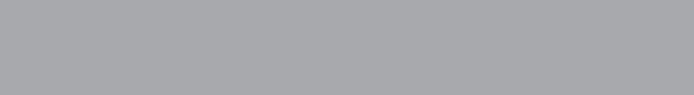
Please read our [Guidelines for Use of Social Media](#) for tips on social media use.

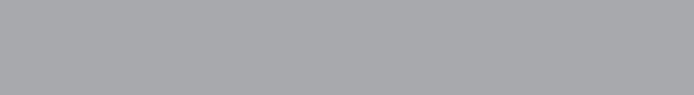
For more information on use of logos and how to download please visit [Logo Downloads](#).

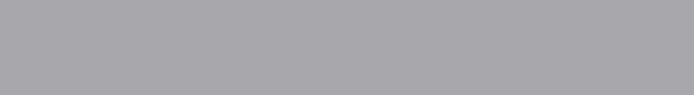
Section 2 - On the day

Below are some other things you will want to consider during your event:

- Assign someone you trust to be responsible for handling the donations.
 - Have a Pledge Form available for donors.
 - During your event, assign volunteers to tasks you feel they are best suited for.
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Event Information:

Name of Event: _____

Type of Event:

One-Time

Annual

Ongoing

Date of Event: _____

Location of Event: _____

Date contribution to the Okanagan College Foundation is expected: _____

Target Market:

Family/Friends

Members

Customers

General Public

Event Details:

Briefly describe the event and how the funds will be raised (if you have done a similar event for the Okanagan College Foundation in the past, it is not necessary to complete this section).

