



UNIVERSITY OF OTTAWA
HEART INSTITUTE
INSTITUT DE CARDIOLOGIE
DE L'UNIVERSITÉ D'OTTAWA

FOUNDATION
FONDATION

EVENT PROPOSAL FORM

CONTACT INFORMATION

Individual or Organizing planning this event _____

Contact Name(s) _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Home Phone _____ Business Phone _____ Mobile Phone _____

Email address _____

EVENT DESCRIPTION

Name of the proposed event _____

Brief description of the proposed event _____

What was the inspiration for the proposed event? _____

Event Date _____ Event time _____

Event location & address _____

Will this be an annual event? Yes No

Has this event taken place before? Yes No

How many people do you anticipate will attend the event? _____

How will funds be raised e.g. ticket sales, raffles, pledges, etc.? _____

Would you like the funds raised to be used for the Heart Institutes highest priorities or designated to a specific program or area within the Heart Institute?



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EVENT PROMOTION, LICENSES & TAX RECEIPTS

The University of Ottawa Heart Institute Foundation receives many inquiries about charitable receipts and receipting. It is essential that all matters pertaining to charitable receipting are handled correctly and, most important, legally, following all Canada Customs and Revenue Agency guidelines

Will your event require tax receipts? Yes No

How do you plan on promoting the event?

- | | | |
|---|--------------------------------------|--|
| <input type="checkbox"/> Brochures/Flyers | <input type="checkbox"/> Newsletters | <input type="checkbox"/> Personal Network |
| <input type="checkbox"/> Print Ads | <input type="checkbox"/> Radio Ads | <input type="checkbox"/> Social Media (Facebook/Twitter) |
| <input type="checkbox"/> TV Ads | <input type="checkbox"/> Other: | <input type="checkbox"/> Please specify _____ |

Do you require an electronic copy of our logo? Yes No

Does your event require a gaming license? Yes No

(Please note that the Gaming Services Act regulates events such as Bingos, Raffles, Monte Carlos/Casinos and 50/50 draws. Community Event organizer(s) must apply for the license through the Heart Institute Foundation as stated in the Gaming Services Act. Please allow six weeks to process applications)

EVENTS FOR THE HEART INSTITUTE POLICY & AGREEMENT

The University of Ottawa Heart Institute Foundation lends support to advance the patient care, teaching and research initiatives of the Heart Institute. The Heart Institute Foundation invites and welcomes special events organized by the community on its behalf.

Policies

The organization/individual(s) organizing the event agree to:

1. Submit the event proposal form which includes a detailed description of the event plans, budget and resources required.
2. Maintain a positive and professional image at all stages of the event process and give the Heart Institute Foundation positive exposure and increased awareness.
3. Proceed in a proper manner as proposed and agreed upon in the initial approved concept and event plan.
4. Ensure benefits are directed to The Heart Institute Foundation.
5. Provide the approved event's overall agenda to the Heart Institute Foundation, which will include the evening/day event itinerary. The approved overall agenda submission must include a copy of the final and confirmed overall event budget breakdown, as well as:
 - a) Expected event expenses
 - b) Financial projections
 - c) Charity amount expected to be raised and donated
6. Use its own mailing list for the event



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The Heart Institute Foundation reserves the right to:

1. Refuse participation in any third-party fundraiser/event that it may find
 - a) Inappropriate in its cardiovascular mission and direction
 - b) Conflicts with other planned future events or current events under way
 - c) Unable to provide required resources or personnel
2. Present the proposed community event plan to the Heart Institute's Foundation board for final approval.
3. Withdraw agreement by giving a 24 hour notice with no financial and/or collateral obligations that may result from such cancellation
4. Determine the use of its logo on all event promotional material, including such things as flyers, posters, promotion on websites, T-Shirts and so on.
5. Audit the records of any event if necessary to ensure compliance with Revenue Canada Regulations.

The Heart Institute Foundation agrees to:

1. Provide community event organizers with appropriate promotion on its website and within the social media program (if available).
2. Where applicable, the Heart Institute will make every effort to provide a spokesperson to attend the third-party event. Please note there may be some circumstances due to scheduling conflicts, where a representative will not be available to attend.

GUIDELINES

Accountability

- The Heart Institute foundation will not assume any legal and/or financial liability associated with your event
- The Heart Institute foundation will not be named in, or sign contracts on behalf of the event organizer(s) nor will a contract be signed or obligations be made on behalf of the Foundation without the Foundation's approval and written consent. All contracts should be viewed by the Foundation before being signed.
- Event's organizer(s) will submit net proceeds from the event together with all related financial reports including complete list of event expenses and revenues within 60 days of the event. The Heart Institute Foundation retains the right to verify the financial reports
- Event organizer(s) will provide the Heart Institute Foundation with a week's notice if the event is cancelled
- Any sporting events require all participants to sign a waiver form waving any physical, personal, and or financial liability
- Event Organizers must preserve and ensure patients rights to privacy. Any information/inquiries regarding any Heart Institute patient or staff member must be directed to the Heart Institute Foundation. The Foundation will work with the Heart Institute's department of communications to coordinate patient, staff or facility photographs, and patient or staff interviews and so on.

Use of Logo & Name

- Please ask permission for any use of the logo and the Heart Institute's name



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Insurance

- The Heart Institute Foundation will not cover insurance for events held on behalf of the Heart Institute

Licenses and Fees

Any events held for the Heart Institute involving licenses and fees will conform to government regulations. The Heart Institute Foundation will not fill out applications for license/permits the event may require but will assist in the coordination. Organizer(s) are required to provide copies of licenses and/or permits upon request.

Name of applicant _____ Date _____

Signature _____

Please complete, sign and return the event proposal form to the address below. Acknowledgment of your application will be forwarded to you within 10 business days.

University of Ottawa Heart Institute Foundation

Attention: Lindsay Firestone

2408-40 Ruskin St.

Ottawa, ON K1Y 4W7

T 613.696.7261

F 613.696.7174

lfirestone@ottawaheart.ca

For Foundation Use Only

Date Approved _____ Approved by _____

Thank you for your support!

Charitable Registration No. 140813452RR0001