



DONOR DIRECTED GIFTS

PHA Canada currently offers two programs into which donations or event revenues may be directed. These are patient scholarships and research.

Any donor wishing to make a Donor Directed Gift, or any event organizer wishing to have the proceeds of an event directed to a specific Association program, must agree to the terms and conditions outlined in PHA Canada's Gift Acceptance Policy.

Event organizers who wish to designate their event's revenue toward a specific program must indicate their intention when first notifying PHA Canada of their fundraising event and must include language to clarify their intention on all event promotional materials. PHA Canada reserves the right to change the Gift Acceptance Policy at its discretion from time to time.

Fundraising campaigns being conducted through PHA Canada's online giving tool must have a concrete amount of time allocated to them for the purposes of collecting money for designation towards a specific initiative. If you wish to set up an online fundraising campaign for a donor directed initiative please contact the PHA Canada office, so that we may set up a page designated specifically for this purpose. These pages must have a firm start and end date and information that donations made to that campaign only during those dates will be designated to a donor directed initiative must be clearly indicated.

Donor directed gifts: Patient Scholarships

Donors may designate up to 100% of donated funds to patient scholarships. In order to designate donations to scholarships a minimum of \$250 must be donated.

These donations are then placed in a general scholarship fund and used at the discretion of PHA Canada's scholarship committee to provide assistance to members of our community in attending PH-related educational events such as conferences and symposia.

Donor directed gifts: Research

Two types of research designations are available:

1. Pulmonary Hypertension Research Scholarships fund (helping to fund students and fellows pursuing PH research)

Donors may designate up to 50% of donated funds towards this program, which provides key scholarship funds to students, fellows and other researchers interested in pursuing a career in PH research. The remaining 50% will be used by PHA Canada* primarily for programs to support the pulmonary hypertension community including but not limited to awareness, education, conferences, and support groups. Donations to this fund will be accumulated on an annual basis (providing a minimum threshold of \$10,000 is met annually, if the threshold is not met, funds will rollover into the subsequent year). Once the minimum has been met, a call for research project submissions will be made. Applications will be reviewed by PHA



Canada's Medical Advisory Committee, based on excellence of the candidate, the supervisor, and the research project and a recommendation for projects to be funded will be submitted to PHA Canada's Board. The decision as to which projects or scholarships/fellowships will be funded will remain at the sole discretion of the PHA Canada Board of Directors under advisement from the Medical Advisory Committee (MAC). PHA Canada reserves the right to designate funds.

2. Large sum donations designated for specific research projects

- a) In the case of large donations (those over \$20,000) made by an individual donor, or through a fundraising effort, the donor may request that a portion these funds be designated immediately to a research project of his/her choice**. The remaining portion will be used by PHA Canada* for programs to support the pulmonary hypertension community including but not limited to awareness, education, conferences, and support groups. A list of current ongoing pulmonary hypertension research projects, updated on a biannual basis is available, or, if the donor is aware of a project or centre towards which he/she would like to designate funds, he or she may request to do so. If a donor does not wish to designate funding to a particular project, the donation amount will be designated into the research scholarship fund.

- b) Donor designated funding will be split between allocation for research and allocation to PHA Canada programs in the following manner. All donations will be split at a rate of 50% up to a maximum of \$20,000 to PHA Canada programs (\$40,000 total donation). Any funds collected beyond this amount (\$40,000) will be designated for use towards PHA Canada programs at 10% of total funds collected, while up to 90% of the funds raised above the \$40,000 threshold can be allocated to approved donor designated projects.

The formula for calculating this will be:

$\$X$ (amount collected) – \$40,000 (this will be split at 50%) = Y (total funds collected to be calculated at the 90/10 split),

$Y \times 10\% + \$20,000$ = amount that will remain with PHA Canada

$Y \times 90\% + \$20,000$ = amount that will be allocated to research.

In practice this would look as follows: a fundraising event designated for research to a specific project raises a total of \$78,000. The split between research funds and funds to support PHA Canada programs will be calculated as follows: $\$78,000 - \$40,000 = \$38,000 \times 10\% = \$3,800$. $\$40,000/2 + \$3,800 = \$23,800$. \$23,800 remains with PHA Canada to be allocated to programs for the PH Community. The other portion ($\$38,000 \times 90\% = \$34,200 + (\$40,000/2) = \$54,200$) will be designated for research.

*No more than 10% of the portion of funds designated to PHA Canada will be used for administrative purposes.

** The request is subject to verification of the validity/merit of such a project by the Medical Advisory Committee and requires final approval of the PHA Canada Board of Directors.