



The Dorothy Ley Hospice

# **GUIDELINES FOR FUNDRAISING**

## **THE DOROTHY LEY HOSPICE**

**The Dorothy Ley Hospice  
3 – 170 Sherway Drive  
Toronto, ON M9C 1A6  
416-626-0116  
[www.dlhospice.org](http://www.dlhospice.org)**

February 2007

## **Index**

|  |   |
|--|---|
| Tips for Hosting a Special Event                 | 3 |
| The Role of The Dorothy Ley Hospice              | 5 |
| What The Dorothy Ley Hospice will do to help you |   |
| What The Dorothy Ley Hospice can not do for you  |   |
| Ways to Reduce Your Costs                        | 5 |
| Tax Receipting Guidelines                        | 6 |
| Event Proposal Form                              | 8 |

## Tips for Hosting a Successful Event

We are delighted that you are interested in supporting The Dorothy Ley Hospice. Special events are a wonderful way to raise funds for a worthy cause and at the same time have some fun with friends and colleagues.

Since we rely on 70 per cent of our funding coming from the community, your efforts on our behalf are truly appreciated. Your support enables us to fund our six key programs free of charge to more than 470 clients and their families each year:

- In-Home Care
- Day Program
- Spiritual Care
- Bereavement Support
- Professional and Community Education
- Volunteer Support

Each time you hold an event on behalf of The Dorothy Ley Hospice, you are helping to make a huge difference in the lives of hundreds of people living with a terminal illness in west Toronto. All events, large or small, take a lot of planning and work. The following guide is designed to provide you and your committee with some helpful tips to ensure your success.

**1. Register Your Event:** We ask that you fill out an event proposal form and submit it to our Manager, Resource Development for approval. Please be aware that you must receive our approval before using our name for your event. All proposed events must be in keeping with the integrity, standing and ongoing work of The Dorothy Ley Hospice.

**2. Form a Planning Committee:** Organizing an event is very time consuming and requires a lot of energy and dedication. We recommend you recruit an enthusiastic team to help you plan and organize the event. It is important that you consider the skills that would be helpful and recruit accordingly. For example, if it is a ticketed event, a rule-of-thumb is to recruit at least one volunteer for every 10 tickets you need to sell. Suggested responsibilities are: sponsor solicitations, auctions and raffles, ticket sales, publicity and marketing, venue and catering, volunteers, entertainment, and event agenda/program line-up.

**3. Develop Goals:** Establish a realistic and achievable financial goal for your event. Then establish a budget setting out your costs and the returns you hope to achieve. This will help you plan the event effectively and make sure you achieve a reasonable return for your effort.

**4. Solicit Ideas:** As the saying goes: two heads are better than one. Get your committee members to do some brainstorming at one of your first meetings to come up with fundraising ideas for your event. One of them may come up with something really creative that will make your event stand out.

**5. Choose an Event that Works:** Make sure you choose an event that is reasonable for the size of your group and the expertise of your volunteers. Pay special attention to the size of the event. If it is your first one, start small and grow the size in subsequent years. If you plan to have a raffle, please make sure you obtain the appropriate licence. Please send us a copy for our files. Keep in mind that it takes eight weeks to apply for a licence and no tickets may be sold until you have the licence.

**6. Picking a Date:** Schedule your event for a time that is convenient for the audience you hope to attract. Make sure there aren't other events planned for the same time in your area. Two fundraising events geared to the same audience on the same day will divide support for both events.

**7. Budget:** Identify possible sources of income and all expenses. The goal is to keep your costs down so that you generate a bigger donation. The more money you raise, the more satisfied your volunteers will feel. Please make sure you fill out the budget section in the event proposal. It is essential for event approval. For larger events, you might want to consider opening a bank account (or establishing a separate account or cost centre with your organization) in the name of the event.

**8. Promotion and Publicity:** The Dorothy Ley Hospice logo is a registered trademark. All uses of our name and logo must be approved by the Resource Development Director or Manager. Make sure you get all of your materials, including information for the media, approved before they are printed and disseminated. Publicity and promotion are key elements to making any event a success. Therefore, we encourage you to get out there as early as you can and then promote, promote, promote until the day of the event.

**9. Tax Receipting:** We ask that all funds and documentation for receipting gifts-in-kind be sent to The Dorothy Ley Hospice within 30 days of your event. The Dorothy Ley Hospice will issue tax receipts for gifts of \$20 or greater. Please allow four weeks from that date for tax receipts to be issued. (See Special Event Receipting Guideline on page 7.)

**10. Saying Thank You:** Thanking those who donated, volunteered and participated is the most important part of your event wrap up. Please acknowledge everyone who participated in or supported your activity and let them know how much you appreciated their help. Don't forget to tell them how much money was raised; it makes them feel good and encourages them to support your event again next year!

# The Role of The Dorothy Ley Hospice

## What The Dorothy Ley Hospice will do to help you:

- Offer advice and expertise on event planning.
- Approve the use of our name and logo. Approval must be obtained from the Resource Development Director or Manager for the use of our name and logo for all fundraising and on all materials before they go to print or are posted on a website.
- Provide a letter acknowledging the authenticity of your event and organizers.
- Offer advice for sponsorship packages.
- Include announcements about your event on The Dorothy Ley Hospice website and in its newsletter *Seasons*.
- Arrange for staff or volunteers to attend the event or cheque presentation, where appropriate.
- Acknowledge direct contributions to The Dorothy Ley Hospice.
- Arrange for charitable tax receipts in keeping with Canada Customs and Revenue Agency guidelines. (Approval must be obtained prior to the event.)
- Prepare and mail thank you letters (which we include as the top portion of the tax receipts).

## What The Dorothy Ley Hospice cannot do for you:

- Offer funding or reimbursement for expenses.
- Share our donor mailing list.
- Prepare and mail thank you letters to anyone who is not receiving a tax receipt.
- Guarantee staff or volunteer attendance at your event. However, we will do our best to have someone attend when invited.
- Support any events that are not in keeping with the mission and integrity of the Hospice. (This includes activities involving tobacco products or graphic sexual materials.)

## Ways to Reduce Your Costs

### *Look for Sponsorships*

One way to reduce your costs and achieve your fundraising target is to solicit sponsorships from local groups and businesses. We recommend you target businesses that are community driven. Include in your sponsorship package:

- What you are raising money for
- Where the event is being held
- When – the date and time
- Who you are
- Why you are requesting a sponsorship
- What steps you will take to acknowledge their support (signage, logo on print materials, and on-stage acknowledgement)

### *Donations*

Another way to reduce costs and increase your revenue is to solicit cash and/or gift-in-kind donations. A good place to start is to approach all of the businesses that your committee members do business with on a regular basis. They know you and may have a hard time saying no.

### *Auction:*

Silent and live auctions can also generate funds for your event. Determine what kind of items you want, ensuring you have a wide variety for people to bid on. Make sure that they are priced and appropriate for your audience. All auction items should be in hand at least one week before the event. Consider how many people you are expecting at the event and gear the number of auction items you want to offer accordingly.

# Tax Receipting Guidelines

The following rules and regulations have been established by the Canada Customs & Revenue Agency (CCRA). We adhere to all CCRA rules and regulations so that we may protect our charitable status and continue our dedication to offering compassionate end-of-life care to our clients and their families, enabling them to live in comfort, with dignity, meaning and hope.

## CCRA Rules & Regulations

The CCRA will use the following guidelines to determine whether there is an “eligible gift” in situations where the donor receives consideration for participation in an event held on behalf of The Dorothy Ley Hospice:

- There must be a clear intent to make a gift.
- There must be a voluntary transfer of property to the organization with a clearly ascertainable value.
- Any advantages the donor receives must be clearly identified and its value ascertainable.
- The amount of the advantage does not exceed 80 per cent of the value of the donation.
- “Eligible Gift” is generally defined as the difference between the value of the property donated to the organization and the value of consideration or advantage received by the donor.

## Tax Receipting Guidelines – Community/Third Party Events

- Event organizers should complete and submit a *Third Party Event Proposal Form* prior to the event.
- Everything that is a benefit to the participants must be included on the Form at fair market value. This includes items and services donated for the event, not just items which are paid for.
- The Dorothy Ley Hospice will review the *Third Party Event Proposal Form* and make a decision on whether official donation receipts will be issued and in addition calculate the “eligible gift.”
- It is the responsibility of the event organizer to communicate decisions surrounding income tax receipting to the participants of the event.
- The minimum official donation receipt that will be issued for all Third Party Events is \$20.00 for the eligible gift. Official donation receipts for under \$20.00 will be issued upon request.

*February 2007*

# Event Proposal Form

Date of proposal: \_\_\_\_\_  
Name of group/company planning the event: \_\_\_\_\_  
Name of individual responsible: \_\_\_\_\_  
Mailing address: \_\_\_\_\_ Suite: \_\_\_\_\_  
City: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Tel. Business: \_\_\_\_\_ Tel. Home: \_\_\_\_\_ Fax: \_\_\_\_\_  
Event Name: \_\_\_\_\_ Event Date: \_\_\_\_\_  
Event Location & Address: \_\_\_\_\_  
\_\_\_\_\_  
Briefly describe the event: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Proposed Budget:** All costs are to come out of the proceeds or be paid directly by the event organizer. Please list all expenses and indicate which ones are being donated. You must complete this section to obtain approval.

## Costs

|  |                               |                                  |
|--|-------------------------------|----------------------------------|
| Location/Venue   | \$ _____                      | Food/Beverage: \$ _____          |
| Printing:(tickets, posters,<br>programs, invites etc.) | \$ _____                      | Advertising: \$ _____            |
| Prizes:  | \$ _____                      | Other: (Please specify) \$ _____ |
| <b>Total Costs: \$ _____</b>                           | <b>Total Income: \$ _____</b> | <b>Revenue to TDLH: \$ _____</b> |

(Total Income – Total Costs)

## Please read the following and sign below to verify that you understand these restrictions:

I agree that prior to holding or publicizing our event, The Dorothy Ley Hospice Resource Development Director or Manager must approve this proposal and all uses of the Hospice name and/or logo. By publicly naming The Dorothy Ley Hospice as the beneficiary of our event, I agree to donate the full amount of the proceeds raised within 30 days following the event.

Signature of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

Name (please print) \_\_\_\_\_

*Acknowledgement of your application will be forwarded to you within 10 days.*