



# Third Party Fundraising Toolkit

Thanks for your help!

We are thrilled that you want to host a fundraiser in support of Valley Hospice Foundation!

The hospice programming relies on the generosity and kindness of individuals and organizations who commit to raise funds for the Valley Hospice Foundation. In addition to the money raised third party events can raise the profile of the hospice and create new friends for the work of the Hospice.





## What is a Third Party Event?

Third Party Events are any fundraising/promotional events or activities which are intended to benefit the Foundation but are not managed by the Foundation itself.

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## ABOUT US

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The Valley Hospice Foundation (VHF) has contributed \$4 million toward the establishment of a 10-bedroom hospice residence to be located in a wooded area near Valley Regional Hospital. VHF continues to fundraise, advocate, innovate and support the Valley Hospice and palliative care initiatives in the Valley region.

The Valley Hospice will be a supportive residential option for those who are in the last phases of life due to serious illness or frailty. With the tremendous support of our community, construction is now underway and is expected to open in early 2020. The hospice will be more than a building. It will be a community of care for the dying and the living; where the individual with a life-threatening illness and their loved ones will receive dignified, compassionate and respectful care. Each room, common area and vista is intended to support a comfortable experience.

In addition to providing care for the dying, the Valley Hospice will benefit loved ones and the surrounding community through specialized support and services including (but not limited to) complementary therapies, volunteer visiting, bereavement and education.

This toolkit is designed to help you get started to plan your fundraising event on behalf of Valley Hospice Foundation.

Let's get started. .



# Third Party Fundraiser Event Ideas

Third Party Fundraisers are a great way for individuals and groups to support Valley Hospice Foundation! And there’s no limit to the types of ideas and events that you can host. Engage your team and creative resources to determine what works for you! Here are just a few ideas to consider:

<b>Auction</b>	<b>Amazing Race</b>	<b>Arts and Crafts Sale/Show</b>
<b>Battle of the Bands</b>	<b>Benefit Dinner</b>	<b>Bingo Night</b>
<b>Book Sale</b>	<b>Casino Night</b>	<b>Concert/Play</b>
<b>Dinner Theater</b>	<b>Fashion Show</b>	<b>Flower Sale</b>
<b>Yard Sale</b>	<b>Golf Tournament</b>	<b>Pledged Events</b>
<b>Scavenger Hunt</b>	<b>Trivia Tournament</b>	<b>Garden Party</b>
<b>Work Event</b>	<b>Barbeque</b>	<b>Raffle</b>
<b>Wine tasting</b>	<b>Home tour</b>	<b>Special Occasions (e.g. Birthdays)</b>

Once you have decided on an event review the Third Party Event Policy (see Appendix A), the Third Party Event Proposal Form ( Appendix B) and the Information in the Tool Kit to maximize the success of your fundraising.



## NEXT STEPS

Now that you have an idea simply follow the  
... the NEXT STEPS

**Step 1:** Your idea!

**Step 2:** Contact the Coordinator of the Valley Hospice Foundation to complete an event proposal.

**Step 3:** In consultation with the Coordinator of Valley Hospice Foundation pick a date / time / location for your event. Be sure to pick a back up location / date if necessary.

**Step 4:** Create a team to see the fundraiser through to completion. It is tough to complete a fundraiser on your own and having more people involved makes it more fun too.

**Step 5:** Check into any logistical requirements (insurance, licenses, rental agreements etc.)

**Step 6:** Create a budget. Determine your fundraising goal and ensure that your revenue and expenses will support you meeting this goal.

**Step 7:** Create a workplan and timeline and set deadlines for tasks

**Step 8:** Complete the required tasks and monitor progress

**Step 9:** Promote your event. Make sure to find effective ways to get the word out about your event.

**Step 10:** ENJOY THE EVENT! The day of the event make sure you take time to enjoy all the hard work you have put it. Fundraising begins with FUN!

**Step 11:** Share your success! You've done a great job, so share your news! Make sure to let event attendees, sponsors and supporters know of your success. Arrange for a photo to include in a media release about the event's success. The Coordinator at VHF can help you to craft a media release.





## Financial Considerations- Permits, Licences and Insurance

Certain fundraising events may require a permit, licence or insurance. The following information will help you to determine what you need and how to get it.

## RAFFLES OR LOTTERIES PERMITS OR LICENSES

All lotteries come under the Alcohol, Gaming, Fuel and Tobacco Division of the NS government.

**What is a raffle or lottery?** Common examples of raffles requiring a permit or license are 50/50 draws or a prize draw

**What is not a lottery or raffle?** If the fundraiser is not based exclusively on chance you do not need a license or permit. For example, the following do not require a lottery permit or licence because skill is involved, rather than a random chance to win: Silent auction, Jellybean counting contest, Hole-in-one putting contest

**Permission to hold a Ticket Lottery** come in two types- one for lotteries or raffles where the prize is worth less than \$4000.00 in which case you need a **permit** and one where the prize is worth \$4000.00 or more in which case you need a **license**. In order to be eligible to hold a lottery you need to be 19 or older and authorized by the charitable, religious or non-profit community organization to apply. If you do not meet the requirements call the Valley Hospice Foundation Coordinator to discuss your options.

### How to apply

- Apply a permit online, by fax or by mail.
- Check the application for details on all required supporting documents.
- Submit your completed application and supporting documents.
- Complete an interview and provide additional information if asked by the Alcohol, Gaming, Fuel and Tobacco Division.

**How long it will take:**

You typically get the permit quickly if you apply online but give yourself 10 days to get the permit just in case more information is needed.

**Cost:**

There is no cost to apply for the permit.

**Applying online for your permit?**

Use this link- <https://ticket-lottery.novascotia.ca/under-4000/en/Criteria/Criteria>

## Games of Chance License

A game of chance is a game where players bet money on a random outcome. Common examples include:

- money games like colour wheel and horse wheel
- merchandise games like darts and ring toss
- casino or Monte Carlo events
- come-and-go bingo games

**Application to Conduct Games of Chance (Charitable) (PDF 86 kB)**

## Liquor License:

If you are serving or selling liquor as part of a fundraiser you will need a Nova Scotia Liquor License. The cost of this license is \$62.30. It will take up to 10 business days to get your license so plan to submit your application at least two weeks before the event. You need this license number when buying the alcohol for the event.

**Special Occasion Liquor Licence Application-** <https://novascotia.ca/sns/pdf/agd-application-for-special-occasion-liquor-licence-fillable.pdf>

## Insurance:

Some events will require special insurance. You may need insurance for the rented venue or to cover an event. Check with the venue to determine whether this will be necessary/advisable. It is easy to purchase the required insurance- you can get coverage through your insurance provider or PAL insurance brokers which specializes in event insurance.

# Developing a Budget

Now that you know some of your logistical costs it's time to develop your budget. A budget is a great planning tool and it will help you to ensure that all your effort will result in a profit. The planning stage during event budgeting is just the starting point. It is difficult to forecast all expenses (and income) so your budget will most likely change during the event planning process. This makes it crucial to review and track your budget throughout the planning process.

A budget does not have to be complicated, but you will need to do some research to determine what your costs will be and how much you hope to make. The template below is a good start if you need help with this process.

INCOME	
Ticket Sales	\$
Sponsors	\$
Donations	\$
Other	\$
Other	\$
<b>Total Gross Income</b>	<b>\$</b>
EXPENSES	
Venue/Location	
Supplies	
Food and Beverages	
Licenses & Permits	
Decorations	
Printing & Advertising	
Giveaways/Promotional Products	
Misc.	
<b>Total Expenses</b>	<b>\$</b>
Subtract total expenses from Total Gross Income	
<b>Net Profits from Fundraiser</b>	<b>\$</b>







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## TAX RECEIPTS

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What will Valley Hospice Foundation provide a tax receipt for? VHF adheres to the Canada Revenue Agency (CRA) Income Tax Act when issuing charitable tax receipts. To learn more about charitable tax receipts, please visit <http://cra-arc.gc.ca> . Issuing inappropriate charitable tax receipts can put our charitable status in jeopardy.

When you are conducting a fundraiser, VHF can generally issue tax receipts for:

- Cash donations of more than \$20.00
- In-kind donations by individuals where fair market value is easily determined.
- A portion of the ticket price for specific pre-approved events.
- Submitted pledges to event participants

Please note that if tax receipts are to be issued the Coordinator of Valley Hospice Foundation will discuss in advance the procedures which must be followed and the documentation which must be submitted.

Valley Hospice Foundation cannot issue receipts for the following:

- Gifts of promises (for example, gift certificates)
- A donation that represents a group effort (proceeds from a bottle collection for example)
- Payment of basic fee for an event
- Donations of services (time, skills, or efforts)
- A gift directed to a specific person or family without discussion with the Coordinator of VHF
- Rent-free space
- Donations of items for auction (unless pre- approved)
- Sponsorships and/or advertising







## Volunteers

One of the factors that will contribute to the success of your fundraiser is having a great team to help you plan and execute it. Where might you find volunteers to help you?

- Consider asking people who would be impacted by the cause for which you are raising funds.
- Ask friends and family to help as this is clearly you are passionate about and they will likely want you to have a successful event.
- Companies are realizing that a key ingredient in their recipe for success these days is giving back. Find a company with this mindset and approach them with the following benefits:
  - It could help build a company's profile
  - Philanthropy has been shown to boost employee morale
  - It benefits the local community
- Approach Service Clubs- many organizations have members who would be happy to help with something that is short term and which someone else is planning.
- Contact a school class who might be studying the cause or who might see this as an opportunity for a Service-Learning project. Depending on your project you might consider High School students, or students at NSCC or Acadia.
- Post your request on Volunteer NS- <https://www.volunteerns.ca/>

Remember volunteers are motivated by:

- Knowing that their time will make a difference
- Having a clear idea of their role (consider a written description)
- Having an opportunity to socialize while volunteering
- Being thanked!

# Checklist

The checklist below will not apply to all fundraising initiatives but use the portions that you think apply. Remember, if you have questions in the planning process check in with the Coordinator of Valley Hospice Foundation for ideas, connections or tips for success.

## Planning

- Create a list of all the items, support and assistance you will need for your event. This includes equipment, volunteers as well as signage and decorations. Create your budget. Find a location / venue and confirm availability for your date (if an outdoor event, prepare a 'rain date' or alternate venue if need be). Create a timeline for your event. It is good to work 'backwards' from your event date.
- If your event includes a schedule of activities for the day of, make sure and draft a timeline (hour by hour) for that day as well.
- Be sure to include marketing and advertising items in your timeline
- Develop and order any posters / tickets / marketing materials - confirm print deadlines. Develop a marketing and promotion strategy including Facebook event page, mail out, e-mail blast, on-line fundraising page, poster and/or ticket distribution.
- Recruit volunteers and assign them specific tasks they will be responsible for (if need be hold a special 'training' night for them to be briefed on their duties).
- Secure any licences and permits required.
- Secure all bookings (venue / catering / music / decorations) with a deposit – confirm deadlines for final details.
- Hold regular meetings with those with designated responsibilities for updates and communication.



## Checklist Cont'

### Day of and During Event

- Ensure all volunteers know their jobs and task.
- Ensure that someone is designated as the person to deal with any questions or problems if they arise.
- If there is money on site (floats etc.) make sure that someone is designated to count and watch all funds in a secure place.
- Make an announcement thanking everyone for attending and announcing your projected donation amount (if known).

### After the Event

- Do a final accounting of all proceeds, finalizing a Net Donation Amount.
- Announce your donation amount to all attendees and supporters (e-mail blast, Facebook post, mail out).
- Send a thank you to volunteers, sponsors and supporters
- Arrange for a donation photo with Valley Hospice Foundation
- Complete and submit the Third Party Post-Event Report ( Appendix C)

