



UNIVERSITY HOSPITALS
KINGSTON FOUNDATION
Our Hospitals. Our Health. Our Future.

SUPPORTING

Hotel Dieu Hospital
Kingston General Hospital
Providence Care

WELCOME... thank you for wanting to share your time and energy to help make a difference in the life of a patient.

We are pleased that you are considering holding a fundraising event to benefit the University Hospitals Kingston Foundation. This kit has been designed to provide information to assist you in the planning of your event. If you have any questions after reviewing this material, please do not hesitate to contact our office.

Your decision to help will have a positive impact on Kingston's hospitals. Your efforts will help support the purchase of important medical equipment, education, research and clinical studies that enhance patient care and improve quality of life during our residents, clients and patients' hospital stay.

Thank you again.

**We are grateful for your commitment to
University Hospitals Kingston Foundation.**

We wish you every success with your fundraising activity.

366 King Street, Suite 201, Kingston, Ontario K7K 6Y3
Tel: (613) 549-5452 ext. 5915
Fax: (613) 549-5455
Email: lori.faggiani@uhkf.ca

Planning a Successful Event

This kit will provide details you should consider before getting started.

Tell Us About Your Event

Please describe your event in writing on the enclosed application form and fax, mail or email it to the Events Coordinator at our UHKF office.

Establish a Committee

Depending on the size of the event you are organizing you may want to consider forming a committee. Identifying friends or colleagues to fill roles such as Chair, Treasurer, and Secretary may help. As well, recruiting members with special skills or access to resources may also make a difference in the success of your event. Organizing a successful event takes a lot of hard work and planning. Be sure to recruit a team of enthusiastic people to help you.

Event Details

Schedule your event for a day, time and location that provides you with enough time to plan the event and is convenient for those who will be attending.

- ✓ Make a plan - include your timetable, deadlines, meeting dates, day to day details as well as a marketing and promotions plan.

Budgets

Establish an attainable objective, a useful rule of thumb: be conservative when estimating revenue. Before moving forward with the organization of an event it is important to outline what your costs will be. This will help you monitor your expenses. It will also help you determine whether your fundraising goals are realistic and attainable. Remember the lower your costs, the larger your contribution. When an event is to benefit University Hospitals Kingston Foundation, the net donation should represent at least 50% of the total revenue. Event organizers are encouraged to control expenses so that this percentage is attainable.

Drawing up a budget always seems daunting. We hope the following tips will help simplify the process:

- ✓ Base anticipated revenue from ticket sales or admission on the estimated number of participants.
- ✓ Gift-in-kind (goods and services provided free of charge) are also revenue.
- ✓ Include sponsorships and donations as revenue.
- ✓ All expenses should be shown in the budget.

For a large event (proceeds in excess of \$50,000), it is wise to open a new bank account in the name of the event with two signatures required.

Finding Potential Sponsors

- Begin with who you know. Begin by asking your employer and then ask family and friends if they would be comfortable approaching their employers.
- If you have a close working relationship with a company, ask if they would be willing to approach their business contacts and suppliers on your behalf.
- Ask if companies will financially match the number of hours their employees volunteer at the event, or the amount of money they donate.
- Find out as much as possible about a company before you approach them. If they have a website, you may be able to learn more about the company and their services.

- Find out the name of the President or CEO of the company and send your solicitation letter to him/her.
- When approaching a company for event sponsorship you are not asking for a donation but selling them on an advertising opportunity.
- When sending a company a solicitation letter, clearly state in the first paragraph your intentions.
- If possible include examples in your package of material that have been produced for past sponsors.
- Consider having various levels of sponsorship. The more money a company donates the more exposure they should receive.
- One week after mailing out your letter, call the company to confirm that they have received your letter. If the letter was faxed or dropped off in person you should follow-up the next day.
- During your follow-up call, ask when is a good time to call back to follow-up on your request, ask permission to call back in two weeks and set a suitable time to talk to them about your request.
- If you are having difficulties getting through to your contact person ask to speak to their assistant / receptionist to see if there is someone else that can handle the request.
- Once you have a sponsorship secured make sure that you fulfill all agreements. Be sure that the company name is spelt correctly and that their logo appears on all appropriate materials.
- See attached for sample sponsorship request letter.
- When you are asking for a donation, whether for cash or a gift in kind, please remember that there are many other community groups also organizing events for our Foundation and the business that you plan on approaching may have already given. Don't take a "no" personally, keep going and you will get a positive response.

Donations and Tax Receipts

A couple of details:

- We ask that all funds raised be forwarded to us within 30 days of the event.
- In order to issue tax receipts to donors in a timely and accurate manner, we require a type written list of the following information:
 - Name and complete address of donor (including postal code)
 - Amount of donation
 - Telephone number of donor
 - Original, and/or a copy of each donor's cheque
- Tax receipts will be issued for all qualified donations of \$20 and over.
- Gifts In Kind will receive a cash receipt.
- Gifts In Kind must be accompanied by a signed statement of value.
- In order for our office to issue income tax receipts to donors, the money that we receive from the event must be equal to or greater than the total receipts issued.

This list does not encompass every tax receipt scenario, and anything outside of this scope will be reviewed by UHKF on a case by case basis. Should you have questions about Canada Customs and Revenue Agency guidelines, please contact the Event Coordinator at our UHKF office.

Fund Designation

One hundred percent (100%) of the revenues received from special events and fundraisers go to the University Hospitals Kingston Foundation to support the work of Hotel Dieu Hospital, Kingston General Hospital and Providence Care. Our Foundation encourages event organizers to support the work of all three hospitals. Events benefiting programs (e.g. surgery, pediatrics etc.) will be shared by all hospital sites providing the program unless otherwise specified.

Promoting Your Event

We encourage you to promote the event and the cause for which you are raising funds. Understanding who will support and attend your event is critical when creating your promotional and marketing materials. You should design and create materials that will appeal to your target audience in order to generate excitement about your event. University Hospitals Kingston Foundation (UHKF) has a logo and legal name, which must be used properly. The Event Coordinator at the UHKF office can provide you with details regarding this.

What is the Media?

The media refers to radio, newspaper, and television as a means of sending out news or information to various public audiences. Free event promotion and publicity will help to increase public awareness and support of your event resulting in an increase in the money raised.

In order to receive coverage, you must work with the media and promote the characteristics of your event that are of interest to people or unique from other events.

Remember the media is bombarded with faxes, emails and telephone calls with information on what people consider "news." You want your event to be unique so that it is news worthy.

The media want to know:

- What is the reason for the event?
- How is this event different from other events?
- How will the event benefit the community?
- Do you have a special guest, celebrity key note speaker?
- Background on the event or the organization.
- Contact name, date, time and location of the event.
- Is there a photo opportunity?

Contact the media by fax, e-mail or drop off a media advisory one to two weeks before the event. When faxing a news release always send it to a particular person or job title. Locate the journalist who is most likely to cover your event. Call the assignment editor to find out the appropriate contact.

Follow up a fax with a phone call,

- Ask if they received the media advisory or media invite.
- Summarize the event, who, what, where, when, why and how.
- Stress the benefits of why you are doing this.
- Give facts and statistics to support the cause.
- Ask if they are interested in attending the event.
- Ask if they are interested in covering the story.

Make a list of all the media that is attending the event. Call them back a day or two before the event to remind them of the details.

During the event be sure to provide them with what they need. Make it clear why you are hosting this event, who benefits from the event, and where the proceeds go. Provide an opportunity for a television or radio interview with key people.

What to do when the event is over?

Donor Recognition:

You have finished your event. The event has been a great success and thanking those involved will ensure that if your group plans on continuing the event that volunteers and sponsors will be more likely to be involved next year. A simple thank you can speak volumes. Remember to thank your volunteers, sponsors, donors and participants as soon as possible after the event. The longer you take, the less of an effect your actions will have on the individual. A thank you may include, but is not limited to, a special letter of thanks, publication of names in the hospital newsletter and our Annual Report, certificate of recognition, hospital tour and more. As well, send a thank you letter to all media who provided coverage of the event. Keep a list of all the donors on file for further use, as well as create a data base of all the names and addresses of volunteers.

Evaluation

How did it go? It is always good to debrief after the event to discuss what went well and what needs to be approved for the next event.

Things to consider during the evaluation:

- Did the event go as planned?
- Did we achieve the goals that we set out to accomplish?
- Did we have enough time to plan and organize the event?
- Did enough people attend the event to make it profitable?
- Is there any potential to increase attendance for the event next year?
- Did we have enough volunteers? Were they suitable for the event?
- Were we able to find donors/sponsors?
- What worked for us this time?
- What can we do differently in the future?
- Are there other ways to increase revenue and to keep our expenses down?

Next Event

Putting on an event takes an incredible amount of energy and resources to make it successful. The first year is always the hardest and takes the greatest amount of work. We hope you will consider making a three year commitment to your event and benefit our hospitals for multiple years. If you begin with a three year commitment, you will see the momentum, energy, excitement and revenue grow each year. If you have any questions about making this transition, we would be pleased to share our knowledge and experience with you.

Approval

In approving third party events, the following guidelines will be considered:

- A. Organizers community profile: this should not, by association, have the potential, outright or through association, to adversely affect the hospitals' images.
- B. Organizer's business mission: It does not conflict with the hospitals' missions and goals, which promote a healthy community.
- C. Nature and Activities of Event: The activity/activities will not compromise the hospitals' reputations and good names.
- D. Success: The event being considered should have a reasonable chance for success.
- E. Long Term Plans: The event does not compromise or have the potential to adversely affect the hospitals' annual or long-range plans for fundraising and development.

THIRD PARTY EVENT PROPOSAL FORM

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

University Hospitals Kingston Foundation
Attention: Lori Faggiani, Events Coordinator
366 King St East, Suite 201, Kingston, ON K7K 6Y3
Tel: 613-549-5452 ext 5915 Fax: 613-549-5455 E-Mail: lori.faggiani@uhkf.ca

Contact Information

Contact Name: _____ Home Phone: _____

Work Phone: _____ Fax: _____

Mailing Address: _____

City: _____ Prov: _____ Postal Code: _____

E-mail: _____

How did you hear about fundraising for University Hospitals? _____

Event Details

Name of event: _____

Proposed date of event: _____

Location of event: _____

Description of event: _____

Will this be a multi year event to benefit the UHKF Yes _____ No _____

Financial Details:

Who do you expect to attend the event? _____

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

Cost to attend per person? _____

Are you seeking sponsorship? Yes_____ No_____

If yes, whom are you seeking sponsorship from? (Attach list, if needed)

Estimated revenue from event: _____ Estimated expenses: _____

Estimated donation to University Hospitals Kingston Foundation: _____

Proceeds designated to: _____

Charitable gift tax receipts will be required. Yes_____ No_____

In order for the UHKF to process required receipts, please fill out and return the attached pledge form with your cheque once the event is completed.

Logistics:

How do you plan on promoting the event?

- | | | |
|------------------|-------------|------------------------------|
| Brochures/flyers | Newsletters | TV ads |
| Publicity | Print ads | Personal network |
| Coupons | Radio ads | Other, please specify: _____ |

Will you require the use of the UHKF logo. Yes_____ No_____

If so how do you plan to use it? _____

We would be pleased to provide you with guidance around the logistics of your event.
Request for resources:

- Letter of endorsement Information on Kingston Hospitals Media contact list

May we promote your event on our website? Yes_____ No_____

Can we release your name and contact info to the media if asked about your event? Yes___ No___

Contact name and number to be used on website? _____

Do you require a Hospital representative to speak at your event? Yes _____ No _____

Will you be having a cheque presentation after the event? Yes _____ No _____

Please provide details: _____

**Third Party
Letter of Agreement:**

1. I acknowledge that the University Hospitals Kingston Foundation (UHKF) auditors may request verification of revenue from events being run on its behalf.
2. UHKF authorizes the Third Party to use its name in communications distributed to the media upon obtaining the prior written approval of UHKF.
3. Hotel Dieu Hospital (HDH), Kingston General Hospital (KGH), Providence Care, or University Hospitals Kingston Foundation and their foundations shall incur no legal or financial liability whatsoever associated with this event.
4. I agree to provide staffing and volunteers for this event.
5. Proceeds will be directed to the highest priority at HDH, KGH or Providence Care, or to a specific area at one of the designated Hospitals as agreed upon by the Third Party and UHKF.
6. Net Proceeds from the Third Party Event together with all related financial reports will be remitted to UHKF within 30 days of the Third Party Event.
7. I agree to use my own mailing list for this event.
8. HDH, KGH, Providence Care or UHKF is not responsible for any accidents or damage to person or property that may occur during the course of the event and the Third Party will arrange that suitable insurance be in place prior to staging the Third Party Event.
9. I acknowledge and agree to comply with all requirements of the Income Tax Act and Canada Customs and Revenue Agency with respect to the provision of donation receipts related to this event and to abide by the municipal, provincial and federal laws for the execution of this event.
10. I understand and acknowledge that HDH, KGH, Providence Care or UHKF reserve the right, at any time, to withdraw the use of their names and logos.
11. If UHKF has serious concerns about the way that the project is being implemented and such concerns are not immediately addressed, UHKF can cancel this agreement by giving the Third Party 24 hours notice. UHKF is not responsible for financial or other damages that may result from such cancellation.
12. Any sporting events require all participants to sign waiver forms, which UHKF will provide.

Signed: _____ **Date:** _____

Please print your name and title:

Signed on behalf of (*name of organization*):

For UHKF office use only

Approved by University Hospitals Kingston Foundation this _____ day

of _____, 200 per: _____

Name: _____

Title: _____

Sample budget Sheet – Dinner / Dance

INCOME		#	\$	ESTIMATED	ACTUAL
Ticket sales	Full price				
	Discounted				
	Freebies				
Sponsorships	Title				
	Auction				
	Food				
	Wine				
	Music				
	Entertainment				
	Venue				
Auction	Silent				
	Live				
Raffle	tickets				
	50/50				
Beverage sales	Wine				
	Beer				
Cash donations	Individual				
	Corporate				
EXPENSES					
Rentals	Hall				
	Dishes				
	Tent				
	Décor				
	Linens				
	Table/chairs				
Food	Meals				
Liquor	Beverage				
Entertainment	Music				
	Sound System				
	Lighting				
Auction	Items				
Printing	Program				
	Bid Sheets				
Signage					
Marketing	Advertising				
	Door Prizes				
Insurance					
Licensing	Liquor				
	Raffle				
Total Income				\$	\$
Total Expenses				\$	\$
Net income				\$	\$

Sample Budget – Golf Tournament

INCOME		#	\$	ESTIMATED	ACTUAL
Participants	Fee				
	Discounted				
	Freebies				
Sponsorships	Title				
	Greens Fees				
	Driving Range				
	Wine				
	Lunch				
	Dinner				
Hole Sponsorship					
Auction	Silent				
	Live				
Raffle	tickets				
	50/50				
Beverage sales	Wine				
	Beer				
Cash donations	Individual				
	Corporate				
EXPENSES					
Golf Course	Greens Fee				
	Lunch				
	Dinner				
	Carts				
Liquor	Beverage				
Signage					
Incentives					
Photographer					
Marketing	Advertising				
	Door Prizes				
Insurance					
Licensing	Liquor				
	Raffle				
Total Income				\$	\$
Total Expenses				\$	\$
Net income				\$	\$

Sample – Sponsorship Letter

Date

Name

Title

Company Name

Address

City, ON Postal Code

Dear **(Name)**,

I am writing to invite **(Company)** to be involved in an exciting community event for a great cause.

The **(Third Party Company)** is busy planning our exciting new event, **(Name of Event)**, with the proceeds going to **(designate which hospital and which area of the hospital you would like)**. This year's event will be held on **(date)** at **(location)** in **(city)**. It promises to be a first class event and an excellent opportunity for local businesses to associate themselves with a worthwhile cause.

We would like to ask for your support of this event through the donation of **(sponsorship)** or **(donation)** for the **(live auction) (silent auction) (prize table)**. Your contribution will be greatly appreciated.

University Hospitals Kingston Foundation is the fundraising arm for Hotel Dieu Hospital, Kingston General Hospital and Providence Care. Created in 2005, the Foundation raises money for programs, equipment, education and research that benefit the 500,000 people in Kingston and Southeastern Ontario served by the three teaching hospitals. To find out more about giving opportunities or to make a donation call 613-549-5452 or toll – free 866-549-5452 or go online to www.kingstonhospitalsfoundation.ca

I would be happy to speak with you about how you can help make this year's event a success. I can be reach at **(contact info)**.

Sincerely,

Name

Contact Information

