

Lupus Ontario – Third-Party Fund-Raising Event Package

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Thank you for sharing your time and energy to help make a difference in the lives of people living with lupus.

We are pleased that you are considering holding a fundraising event to benefit Lupus Ontario. This package has been designed to provide information to assist you in the planning of the event. Please contact the Fundraising & Marketing Manager with any questions.

Your decision to help will have a positive impact on those living with lupus. Your efforts will help fund:

- 1) Research and clinical studies.
- 2) Support, including personal support and support groups.
- 3) Education regarding lupus (*although we do not provide medical advice*). Assisting with the education of Rheumatologists (the specialist doctors who treat lupus) via the annual Geoff Carr Fellowship.
- 4) Increasing public awareness of lupus.

Thank you again.
We are grateful for your help.
We wish you every success with your fundraising activity.

Lupus Ontario
285 Taunton Road East,
Suite 4438 Oshawa, ON L1G 3V2
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What is a Third-Party Event?

A third-party event is not an official Lupus Ontario event, organized by Lupus Ontario. A third-party event is organized independently (by a volunteer, community group or company) and with Lupus Ontario's approval.

About Lupus and Lupus Ontario

What is Lupus?

Lupus is a debilitating autoimmune disease where the body attacks itself causing inflammation, pain, and possible organ damage. Five million people suffer from lupus globally and there is currently no cure. Nine out of ten lupus patients are women, usually diagnosed between the ages of 15 and 45. Lupus is a condition that takes on average 6 years to diagnose as there are a multitude of possible symptoms/markers.

Lupus Ontario

Lupus Ontario's mission is to provide vital support, education, awareness, advocacy, and research through the fundraising efforts of our staff and volunteer community to help those with lupus live longer, healthier and better lives. As the largest provincial organization, Lupus Ontario has spent the last 46 years focused on improving the lives of lupus patients and their families through advocacy, education, public awareness, support and research.

Lupus Ontario is a member organization of Lupus Canada and our ultimate goal is: **Life without lupus.**

Our Commitment Pillars:

- 1) Support Programs
- 2) Education Programs
- 3) Public Awareness
- 4) Research and Clinic Support
- 5) Volunteering

Event Planning Checklist

Before the Event

- 1) Form a committee, recruit volunteers and brainstorm ideas.
- 2) Establish a fundraising goal and create a budget. 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 and help you determine whether your fundraising goals are realistic and attainable. Remember, the lower your costs, the larger your contribution to Lupus Ontario to help those living with lupus.
- 3) Find the location and schedule an event.
- 4) Submit your Proposal Form to Lupus Ontario.
- 5) Organize and plan your event details.
- 6) Finding sponsors in your local community can help keep your expenses low by offsetting some of the costs of your event. Begin with who you know. Start with your employer and then ask family and friends if they would be comfortable approaching their employers. Ask if employers will match the amount of money their employees donate.
- 7) Check into any safety or legal issues (eg. permits, insurance, alcohol and liquor licenses) and plan accordingly.
- 8) Promote your event, making sure that all material with Lupus Ontario's logo have been approved. Flyers, posters, emails, and social media posts can increase attendance at your event. All marketing material that includes the Lupus Ontario logo must be approved by Lupus Ontario.

During the event

- 1) Ensure your volunteers have clear direction and understand their roles.
- 2) Assign someone to handle donations and ensure donation pledge forms have complete donor and payment information.
- 3) Display and distribute Lupus Ontario swag if available.
- 4) Have FUN!

After the Event:

- 1) Thank your volunteers, sponsors, and donors.
- 2) Collect the funds.
- 3) Complete the Financial Summary Form.
- 4) Send the Financial Summary Form, Donation Pledge Forms, and cash or cheques (made out to "Lupus Ontario") to Lupus Ontario within two weeks of your event.
- 5) Consider making a multi-year commitment to hosting the event – remember, the first year is the hardest and takes the most work.

What Lupus Ontario can and cannot do for your event

What Lupus Ontario can do for your event.

- 1) Provide advice on organizing your event. Give us a call to discuss ideas. We would like to hear from you and talk about how you can make your event a success. We can also answer any questions you have as you fill out the Proposal Form.
- 2) Send a Lupus Ontario representative to attend your event. (However, given the busy schedule of our representatives and the large number of events each year, we cannot always guarantee this.)
- 3) We can provide lupus information brochures and material for your event. Please let us know one month in advance to allow for shipping.
- 4) Issue tax receipts, subject to Canada Revenue Agency guidelines. (*Donations \$20 and up can receive a tax receipt.*)
- 5) Promote your event on our social media.
- 6) Authorize use of the Lupus Ontario name and logo.

What Lupus Ontario cannot do for your event.

- 1) Pay for any expenses or advance funds to cover any expenses.
- 2) Provide you with a list of Lupus Ontario sponsors and donors.
- 3) Solicit people or organizations for sponsorship or donations for any auctions or raffles. The organizer is responsible for any canvassing.
- 4) Find volunteers for your fundraising event.
- 5) Request or obtain any required permits, licenses, approvals, alcohol and liquor licenses or insurance coverage.

Event Proposal Form

Thank you for your interest in supporting Lupus Ontario. Please complete this form and email to abrooks@lupusontario.org at least one month prior to your event date.

Main Contact Information

First Name: _____ Last Name: _____

Email: _____

Street Address: _____

City: _____ Province: _____ Postal Code: _____

Please select the category that describes you best:

- Individual Business Individual Community/Social Group
 Service Club Other _____

Event Information

Event Name: _____

Date and Time: _____

Short description: _____

Venue Name: _____

Street Address: _____

City: _____ Province: _____ Postal Code: _____

Estimated Donation to Lupus Ontario: \$_____

Do you understand and agree to Lupus Ontario's third-party fundraising guidelines?

- Yes No

Do you agree to submit donations from your event to Lupus Ontario within two weeks of your event?

- Yes No

Financial Summary Form

Thank you for your interest in supporting Lupus Ontario. To ensure transparency in all our fundraising activities, please complete the form below and enclose it with the Fundraising Pledge form and the proceeds from your event.

Please forward all documents to Lupus Ontario within two weeks of your fundraising event.

Event Name: _____

Event organizer: _____ Phone: _____

Event revenue summary:

	Amount (\$)	Number donors
Cash ¹ /cheque donations (Receiptable) ²		
Non-receiptable donations (e.g. ticket sales, raffle, auction, etc.)		
Total		

¹ Please do not mail cash to Lupus Ontario. If you receive cash donations, please send an e-transfer to admin@lupusontario.org, write a cheque or money order for the equivalent amount, ensuring to include donor names and contact information on the Lupus Ontario Pledge Form. All cheques should be made payable to "Lupus Ontario".

² Tax receipts will be issued in accordance with Revenue Canada Guidelines and Lupus Ontario's Fundraising Guidelines and Tax Receipt Guidelines. Lupus Ontario will issue tax receipts for \$20.00 or more.

Printed Name: _____

Signature: _____

Date: _____

Fundraising Pledge Form

Information collected must be legible and complete to receive a tax receipt. Tax receipts will be issued for \$20.00 or more, subject to: Revenue Canada Guidelines, Lupus Ontario Fundraising Guidelines and Lupus Ontario Tax Receipt Guidelines.

We respect your privacy; the personal information you share with us will be used to process your donation, provide you with opportunities to help those living with lupus and communicate with you about our work. Your information will not be sold, traded, or rented to any other organization.

Event Name: _____

Event Organizer: _____ Phone: _____

Donor Name	Street Address	Apt/Suite #	City, province	Postal Code	Phone Number and email address	Donation amount
					TOTAL:	

Lupus Ontario
285 Taunton Road East,
Suite 4438 Oshawa, ON L1G 3V2

Appendix 1: Lupus Ontario Fundraising Guidelines

Thank you for your interest in supporting Lupus Ontario. Before you begin planning your event, please review the guidelines below to ensure your event qualifies as a third-party.

Terms and conditions: In order for Lupus Ontario to endorse fundraising events held on its behalf, the organizer needs to agree to the following terms and conditions:

- 1) Prior approval to hold a third-party event is required. Approval is based on the type, theme and financial viability of the event. Lupus Ontario reserves the right to withhold the use of its name and logo from any event it feels is inappropriate.
- 2) All events must be in alignment with the Vision and Mission of Lupus Ontario.
- 3) An event proposal form must be completed and submitted at least one month prior to the date of the event.
- 4) Lupus Ontario must approve all advertising/promotional material. The material must indicate that your event is “in support of” or “proceeds go to” Lupus Ontario. Publicity should not suggest that Lupus Ontario is involved as anything other than the beneficiary.
- 5) Taking commission, for any purpose, on funds raised as part of a third-party event is prohibited.
- 6) Lupus Ontario assumes no legal or financial liability associated with the event. Lupus Ontario is not responsible for any damages to persons or property at an event. Third-party organizers are responsible to obtain any required permits, licenses, alcohol and liquor licenses, and insurance.
- 7) Third-party organizers are required to finance all costs and expenses. Lupus Ontario will not finance any costs. The organizers are responsible for obtaining and paying for any required insurance.
- 8) Official tax receipts will be issued for donations of \$20 or more, in accordance with Canada Revenue Agency guidelines.
- 9) Attendance of Lupus Ontario volunteers and staff will be at the judgement of Lupus Ontario, taking into account the location and nature of the event as well as the availability of volunteers and staff.

Appendix 2: Lupus Ontario Tax Receipt Guidelines

It is important for you to understand the rules about tax receipts before you plan your event. It is your responsibility to communicate with donors regarding tax receipts. All donations must meet the conditions defined by the Canada Revenue Agency.

Lupus Ontario will only issue tax receipts for the amount of the actual donations received by Lupus Ontario. Tax receipts cannot be issued for funds used to cover the costs of the event or administrative costs. Tax receipts cannot be issued for amounts for which the donor receives a tangible item or benefit.

Tax receipts will be issued by Lupus Ontario for third-party events:

- 1) Provided Lupus Ontario receives a statement showing all revenues and expenses from the event.
- 2) Provided that event organizer ensures that the amount of money collected after expenses is sufficient to cover the amount of money for which receipts have been requested.
- 3) For in-kind good or services donated to an event with proof of value provided.

Tax receipts will not be issued for:

- 1) The purpose of admission tickets or green fees.
- 2) Auction of raffle items.
- 3) For in-kind good or services donated to an event that do not have proof of value provided.
- 4) For sponsorship, advertising or promotion which is received by the sponsor/donor in return for the payment.
- 5) Gift certificates donated by the issuer of the certificate.
- 6) The actual cost of a dinner or any other benefit received by the donor. The tax receipt can be provided for the donation, excluding the cost of the dinner or benefit.

Appendix 3: 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				
	Tickets				
Raffle	Tickets				
	50/50				
Beverage sales	Wine				
	Beer				
Donations - Cash	Individual				
	Corporate				
EXPENSES					
Rentals	Hall				
	Dishes				
	Tent				
	Decor				
	Linens				
	Tables/Chairs				
Food	Meals				
Alcohol	Wine/Beer				
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					

Appendix 4: Sample Event Checklist

TASK	RESPONSIBILITY	DATE	COMPANY	STATUS
Event Budget				
Site for the event				
Invitation				
Keynote Speaker				
Menu				
Entertainment				
Audio Visual				
Ticket Sales				
Sponsorship				
Program				
Raffle/Auction items				
Publicity/Promotion				
Decorations				
Licenses/Permits				
Mailing/Courier				
Donations				
Photographer				
Flowers				
Signage				
Volunteers				
Website/Social Media				
Media Release				
Security				
Maintenance				
Thank you letter				
Invoices paid				
Pledge sheets, cheques and financial summary to Lupus Ontario				

Appendix 5: Event Ideas

- 1) Auction (art, service, silent)
- 2) Car Wash
- 3) BBQ
- 4) Trivia Night
- 5) Bake Sale
- 6) Scavenger Hunt
- 7) A-thon (skip, dance, etc)
- 8) Benefit Concert
- 9) 50/50 Draw
- 10) Raffle
- 11) Fashion Show
- 12) Tournament (gold, bowling)
- 13) Movie Night
- 14) Casino Night
- 15) Bottle Drive
- 16) Garage Sale