



Regional
HIV/AIDS
Connection

Regional HIV/AIDS Connection Third Party Event Planning Guide

Third-party fundraising events

From hosting a party, to organizing a tournament, to donating proceeds from a sale, there are countless ways you can raise funds for Regional HIV/AIDS Connection (RHAC). We are open to exploring these and other ideas with you!

What is a third-party fundraising event?

A third-party fundraising event is any activity by a non-affiliated group or individual where Regional HIV/AIDS Connection has no fiduciary responsibility and little or no staff involvement.

- An event coordinated by an organization or person external to RHAC.
- Responsibility of all event elements and surrounding activities reside with the designated third party coordinator.
- Proceeds from the fundraising activity are intended to be donated to RHAC.

If you have an idea or plan for an event that will benefit RHAC, follow these simple guidelines:

- Complete an application and submit a signed Third-Party Fundraising Agreement. All events must be approved by RHAC in advance. This is an important safeguard in preserving the integrity of Regional HIV/AIDS Connection and our commitment to raise the funds necessary to fulfill our mission in a cost-efficient and effective manner.
- We will review your plan and do our best to contact you within approximately 5 days. While we are able to provide guidance for your event, we do not have the personnel to handle the organizational and administrative tasks associated with third-party events. Therefore, you are responsible for all details of the event including: underwriting all related costs, recruiting volunteers to help out at the event, creating flyers to publicize the event, and working at the actual event.
- The event must not be promoted in a manner that makes statements or conveys the appearance that Regional HIV/AIDS Connection endorses a particular product, firm, organization, individual or service.
- Regional HIV/AIDS Connection must approve all promotional materials, including but not

limited to advertising, letters, brochures, flyers and press releases prior to production or distribution. **All promotional materials must clearly state the percentage of proceeds that will benefit RHAC.**

- RHAC should receive a list of targeted sponsors for the event before they are approached to minimize overlap with other RHAC events and/or fundraising campaigns that may be underway.
- RHAC can provide collection canisters and informational materials promoting the organization, its goals and accomplishments. Advance notice is required about the quantities needed for the event.
- Event organizers are responsible for obtaining all permits, especially those for raffles and/or games of chance.
- Event organizers must obtain their own liability insurance to cover the event. Regional HIV/AIDS Connection is not financially liable for the promotion and/or staging of third-party events.
- Under no circumstances should third-party event revenue and expenses flow through Regional HIV/AIDS Connection books. Only the final net proceeds from the event are to be processed by the RHAC. RHAC should receive a complete accounting of all funds collected and expenses related to the event. We reserve the right to inspect all event financial records.

Become an RHAC Fundraising Leader

The funds raised from third-party events **further our mission, raise awareness** and **support free services for those at risk, living with and affected by HIV/AIDS** in London/Middlesex, Perth, Huron, Oxford, Elgin and Lambton.

Please note that anyone interested in planning an event to benefit RHAC must submit a completed and signed Third Party Event Agreement. The following guidelines will provide helpful information for planning a successful fundraising event.

We want to hear from you!

Please contact Zena Currie, Fund Development Coordinator, today to discuss your proposed event! Call 519-434-1601, toll free 1-866-920-1601 ext. 257 or email her at:

zcurrie@hivaidconnection.ca

Thank you for demonstrating your community spirit by expressing interest in planning a fundraising event to benefit RHAC!

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Event Planning Guide

The following template will provide you some useful step-by-step event planning information suitable for any event.

1) What type of event are you interested in? What is involved?

Please review the event categories listed and see what interests you. Organizing any type of event can be a fun and rewarding experience! Read below to find event suggestions, an outline and handy tips.

- **Sales event** involves selling items or services.
- **Tournament event** typically involves an entry fee and perhaps pledge gathering.
- **Ticketed event** charges guests an entry fee or ticket price.
- **Honorariums & Celebrations** offer guests the option to give donations in lieu of gifts to an honoree or to make a donation on someone's behalf.

2) How many people will you need to assist you in organizing your event? Will you need a committee?

Once you have decided on your event, one of the first things to do is determine how much help you'll need to carry out the event? Often events will require a committee. If this is the

case, it is important to decide what an ideal size will be for a planning committee. This can best be determined by breaking the event down into project areas (such as publicity, entertainment, sponsorship) and then assigning one (or more) committee members to each area.

3) Create goals and objectives. Brainstorm ideas.

Whether you are working on your own or with a committee you will want to determine early on your goals and objectives. These goals will guide the rest of your planning and help evaluate the event after the fact. Make sure you don't just list your goals—prioritize them, and determine how you will measure their success.

4) What will your event look like?

Now that the structure for your event is in place, you will want to determine the details to create an event outline. Where will your event be held? At what time will it take place? For how long will the event run?

5) Tell us about your event!

Have you filled out the Third-Party Fundraising Agreement yet? Please make sure you do as soon as possible! The proposal form can also help guide you in answering questions to ensure you haven't missed major details. Once Regional HIV/AIDS Connection has received your completed third-party agreement we can better support your event and answer any questions. **Please visit our website to download a copy.** Complete the form and send it via email to zcurre@shivaidconnection.ca, or by fax to 519-434-1843, or mail it to us at: #30-186 King St., London, ON N6A 1C7

6) Create a timeline.

It's important to create a timeline and determine what will be done when. Make sure you also consider which committee member (if you have a committee) will be responsible for completing each task? A task list can be very important to ensure the project is completed as scheduled. Try to complete or prepare for ahead of time as many task items as possible.

7) Budget! Budget! Budget!

Now that you know what your event looks like, you will want to determine what your costs are. To help you with the budgeting process, a supplement is available: **Appendix A – Budget Planning.** Remember, it is always best to overestimate expenses and to be realistic with revenue projections.

One way to help reduce costs is to approach local businesses for either cash sponsorship or for the donation of an item that you would have otherwise purchased. In some cases, companies may also be willing to give you a discount. It's often best to approach a company with a letter explaining what you are asking for. Please refer to **Appendix B – Sponsorship**, for more details.

If you are planning a live or silent auction, a similar letter may be used to solicit items. Make sure to clearly outline how the item or funds will be used, and how the organization's contribution will be recognized. Please refer to **Appendix C – Auction**, for planning details to add this element and raise more funds.

8) Will the event need volunteers? Create a recruitment plan.

A larger scale event will require volunteers other than those on the committee. If your event falls into this category, you may need to consider recruiting volunteers for the event.

Determine how many volunteers will be needed and what their responsibilities will be. Make sure that when asking people to volunteer you go over responsibilities with each person. Once you have determined how many volunteers you will need, and what they will be responsible for, create a recruitment plan. The best way to do this is to contact friends and family who may be interested in supporting your event.

9) How will you promote your event?

A strong promotional strategy is one of the most important elements in the planning process. It will dictate the number of attendees/supporters you attract and therefore the net proceeds of the event, but it is often forgotten or not given the priority attention it requires.

Before determining your promotional plan, review your goals and objectives. Every promotional item should help bring you one step closer to achieving these goals.

- Word of mouth can often be the most powerful form of advertising - tell everyone you know about your event and encourage your committee to do the same.
- It may be helpful to design an e-mail template that you and committee members can send to friends soliciting support and asking them to pass on.
- Evite, www.evite.com is a great, **free** tool for sending out electronic invitations to your event. There are many add-ons and enhancements to customize your invitation.
- Consider creating posters for the local community board and to place in businesses where you have the permission of the owner/manager.
- Social networking: Websites are free, popular tools to connect with numerous people at one time! Facebook and Twitter are great way to promote events!
- Determine whether or not it would be beneficial for your event to be advertised through media – either paid or for free. If so, contact the local news, radio, and TV

stations and find out if you can access public service announcements or if there are community boards available to post events on. They may even be interested in covering your event depending on what it is. We have learned that some of the most creative publicity methods are the most effective—so put your thinking cap on!

- We would be happy to provide you with the RHAC logo for your promotional purposes.

****Remember to send a pre-production copy for approval (preferably by e-mail) to RHAC, of any print materials containing the RHAC logo. We request to see any promotional materials pre-production to protect the integrity of our brand and to ensure we are properly and consistently represented.***

10) Be ready to trouble-shoot!

It is normal for things to go slightly wrong, even at the best planned event! Be ready for unexpected changes and issues that arise last minute. Try to stay calm and open-minded—sometimes complicated problems require creative solutions. One way to help minimize these unexpected “issues” is to brainstorm possible scenarios before the event and lay out a contingency plan or a “what if” list.

Some scenarios to consider:

- *Is your event outdoors? If so, what will you do if it rains or dangerous weather arises? Is re-location a possibility?*
- *What will you do if you run out of food?*
- *What if less volunteers show up than you expected?*

Coming up with contingency plans ahead of time and being as organized as possible for complicated scenarios can leave you more prepared for the actual event day.

11) Safety Action Plan

It is paramount to ensure a safety action plan is in place. The plan should include a single person designated to coordinate any emergency as well as a list of emergency telephone numbers. It would be ideal that the first designate be first aid and CPR certified. The safety of event participants and volunteers should take top priority. Be prepared and try to avoid any foreseeable mishaps.

12) Collect the Funds

Make sure you set up a system for collecting funds before, during and after your event. In order to remain organized, we recommend keeping careful track of the funds as they are received and to keep them in a secure area. Make arrangements to have an adequate cash float for making proper change.

13) Tax Receipts

In some situations Regional HIV/AIDS Connection may be able to issue tax receipts to donors/participants. This is entirely dependent on the nature of the event. We can provide you more detailed information about tax receipts after reviewing your **Third Party Fundraising Agreement**.

14) How will you thank your volunteers and participants?

The “Thank You” portion of an event is often overlooked in the planning process. It cannot be stressed enough how important it is to thank your supporters, volunteers and participants. Before the event begins determine how to thank all the people involved at every level. Consider mailing personal hand-written thank you cards to all those who helped make the event a success!

15) Evaluate the event and congratulate yourself and the committee!

Make sure to evaluate the event within a couple of weeks afterward when thoughts and valuable feedback are fresh in the minds of all involved. This analysis will help to determine if you want to organize the event a second time. Documenting feedback from volunteers, committee members and attendees will improve the event in future. Don't forget to take the time to congratulate yourself and your committee!

THANK YOU for your support of Regional HIV/AIDS Connection!

Your efforts will make a difference in the lives of thousands of men, women and youth at risk, affected and living with HIV/AIDS.

Contact us today!

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Appendix A Budget Planning

Tips

- Remember that when budgeting, it is often best to overestimate your expenses, and underestimate your revenues.
- A common budgeting mistake is not including the taxes with each amount--don't forget to include taxes in your calculation.
- The template includes some common budget lines. Feel free to make adjustments to suit your event needs.
- It is helpful to have a separate column for budget projections to compare and track actual costs/revenues. This will help greatly in your evaluation of the event.
- A third column for "notes" can help keep you organized.

To assist you in planning, a sample budget is included below.

Sample Budget:

| Revenues | Budget | Actual | Notes |
|---|---------------------|---------------------|-------|
| Ticket sale revenue | | | |
| Sponsorship revenue | | | |
| Revenue from food sales | | | |
| Revenue from misc. donations | | | |
| Revenue from other event (i.e. auction) | | | |
| Other revenue | | | |
| Total Revenue | total budget | total actual | |
| | | | |
| Expenses | Budget | Actual | Notes |
| 1) Administration Expenses | | | |
| Office supplies | | | |
| Salary costs (if you hire someone) | | | |
| Printing | | | |
| Postage | | | |
| misc admin expenses | | | |
| Total Admin Expenses | total budget | total actual | |

| | | | |
|--|--------------|--------------|--|
| | | | |
| 2) Venue Expenses | | | |
| Venue rental | | | |
| Sound Equipment rental | | | |
| Lighting equipment rental | | | |
| Chair/Table rental | | | |
| Security (if you hire security guards) | | | |
| misc venue expenses | | | |
| Total Venue Expenses | total budget | total actual | |
| | | | |
| 3) Entertainment Expenses | | | |
| Band/Speaker costs | | | |
| Accommodations for Band/Speaker | | | |
| transportation for band/speaker | | | |
| supplies for entertainment | | | |
| other entertainment costs | | | |
| Total Entertainment Expenses | total budget | total actual | |
| | | | |
| 4) Food Expenses | | | |
| Costs of buying food | | | |
| food storage expenses | | | |
| food preparation expenses | | | |
| Total Food Expenses | total budget | total actual | |
| | | | |
| 5) Promotions Expenses | | | |
| Print material costs | | | |
| Ad costs (taking out an ad in a newspaper, radio, etc.,) | | | |
| Web site expense | | | |
| Web and/or graphics designer | | | |
| Total Promotional Expenses | total budget | total actual | |
| | | | |
| Other Expenses | total | total | |

| | | | |
|---------------------------------|-----------------------------------|----------------------------------|--|
| | budget | actual | |
| | | | |
| Total Expenses | total budget | total actual | |
| | | | |
| Profits (Bottom Line | | | |
| (Revenues(R)-Expenses(E) | Budget Rev.- Budget Exp. | Actual Rev- Actual Exp. | |

Scroll down to read Appendix B - Sponsorship

Appendix B

Sponsorship

Sponsorship is an exchange of cash or goods in return for public recognition.

Is it possible to get any of your event costs donated? Item donations and cash sponsorship are a great way to reduce costs and increase your bottom line.

Sponsor Tax Receipts:

Canada Revenue guidelines indicate that because of the nature of a sponsorship transaction, in that a promotional service was offered to the sponsor, a charitable income tax receipt cannot be issued. [Please refer to section 13 - Tax Receipts for more information.](#)

Tips for Writing Sponsorship or Donor Letters

- When approaching a sponsor/donor, make sure you have all the information about the event and an understanding of the programs and services of Regional HIV/AIDS Connection. This way, any questions can be met with enthusiasm and confidence.
- A brief telephone call asking for the sponsor's appropriate contact name and information can ensure the proper person receives your ask.
- Mail a sponsorship package containing your sponsorship letter ask, details about the event and its purpose and why you are personally choosing to support RHAC. Your passion for the cause will demonstrate your commitment to the event and may be more likely to solicit a sponsorship or donation.
- Consider including how many people will be involved in your event or how many people are expected to receive your promotions (this is an important point to include in your letter as it is often the selling feature for a company).
- Follow up with a phone call a week or two after the letter is sent.

Sponsorship Menu

When approaching sponsors asking for various cash/items, it may be helpful to create a separate menu sheet that can be attached to the letter. The menu can differentiate between gold, silver, and bronze donors by outlining what cash or donation value will be required of the sponsor to achieve any of these levels and what recognition benefits will be provided.

If the event only requires minimal sponsorship, then creating a separate sponsorship menu is unnecessary. It would make more sense to just outline recognition opportunities right in the sponsorship letter.

Sponsorship Menu Tips

Common recognition opportunities:

- Display signage provided by the sponsor.
- Place sponsor logo or name in event program.
- Include sponsor logo on website..
- Place sponsor name/logo on various promotional materials
- Opportunity to supply product/promotional items (great for gift bags!).
- Opportunity for booth/display at event venue.
- Naming opportunities of key event areas.
- Special mention during event.
- Recognition in all e-communications.
- Speaking opportunity.
- Lead positioning on promotional materials.

Don't be discouraged by a business that says "no", and remember the more businesses you approach the better your chance of getting a "yes". Good luck!

The following structure will ensure all pertinent information is provided to a potential sponsor. See below for a sample of a sponsorship letter.

Sample Sponsorship Letter:

Event Logo (option)

Contact Person
Company
Address
City, Prov Postal

Dear Contact Person,

We would like to invite your company to partner with us in an exciting opportunity - our upcoming fundraising community event:_____. The goal of the _____event is to raise funds and awareness for Regional HIV/AIDS Connection. Regional HIV/AIDS Connection provides free programs and services to people in our community who are at risk, affected by and living with HIV/AIDS.

- HIV/AIDS remains a concern for Canadians.
- Recent estimates reveal **over 65,000** Canadians are living with HIV/AIDS. An estimated 3,000 people in our catchment area are living with the virus and the London area continues to have the **third highest infection rate in the province.**
- **Proceeds will help provide HIV/AIDS programs and services in your community.**

We urge you to join us today and demonstrate your commitment to the community's health!

1. Item donation:

A _____ would help very much in _____ (*explain how it would be used*). In return for your generosity, we would like to offer you the following recognition... Your support will ensure our event's success and assist us in the fight against HIV/AIDS in our community.

2. Cash sponsorship donation:

Please review the attached sponsorship opportunities and see how you can partner with us in the fight against HIV/AIDS.

We will be in touch with you soon to discuss this proposal further. Thank you for your consideration.

Sincerely,

Event Organizer
Contact Information

Appendix C

Auctions

Including an auction in your event is a great way to increase revenue, present local business with an opportunity to become involved and provide guests with another activity. There are two types of auctions: silent and live.

Silent Auction Outline

1. Secure donations of items. See **Appendix B – Sponsorship** for more details.
2. Custom design a bid sheet for each item utilizing the downloadable **sample bid sheet**
3. Place a bid sheet(s) and pen in front of each item to track what guests are willing to pay.
4. Bid increments as well as the value of the item should be noted on bid sheets. If it is a rare item or an experiential opportunity, “priceless” can be noted as the value.
5. Consider grouping auction items together in “themed” packages.
6. Secure a team of volunteers to assist bidders, open/close the auction and process payments.
7. It is beneficial to post auction rules or include them in a program. Be sure to include the opening and closing time for acceptable bids. Payment options are important to highlight.
8. A Master of Ceremonies can make a few announcements to encourage bidding and also to remind attendees when the auction is closing.
9. Completing the auction item receipts in duplicate **prior** to the event expedites efficiency at the close of the auction when everyone wants to pay and exit.
10. Try to avoid line ups and have adequate volunteer help for cash out at the close of the auction. Ensure packing materials are on hand. Your guests will appreciate thoughtful organization and preparedness.

Live auctions are typically for higher priced items, and therefore have the potential to realize greater revenue.

Tips

- Search for **rare or unique items** or **experiences**. This seems to be the hottest trend today and can prove to be an attendance draw! It may be difficult to assess the starting bid for these items, but an auctioneer or an associated professional may be able to help. When planning the types of items you would like to secure for auction, consider the audience you are trying to reach. Try to match their general areas of interest. You can potentially raise more funds by offering a coveted item that spurs on some friendly competitive bidding!

- **Secure a professional auctioneer** if possible. This will ensure your event is run professionally and your guests will appreciate it.
- Provide the auctioneer with a bid number for each item as well as a description. If applicable, include the sponsor here for some added recognition.
- Organize spotters to recognize and point out bids to the auctioneer. Live bidders can be given paddles or bidding numbers at the beginning of the event to maintain organization.
- Promptly deliver or organize the winning bid for each item. Pre-written receipts will expedite the payment process. Ensure receipt of payment from each bidder before they leave with their winnings.
- Try to avoid line ups and have adequate volunteer help for cash out at the close of the auction. Your guests will appreciate thoughtful organization and preparedness.