

# SOS Community Fundraising



Fun  
with a  
purpose



Society of  
Organized  
Services

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# About SOS

The year was 1968. A small but mighty group of concerned citizens noticed that some needs were going unmet for local school children and their families. They also saw how many adults and seniors were going without basic necessities.

Fueled by the belief that a community cannot be great unless it is great for everyone, the District 69 Society of Organized Services (SOS) was formed to provide resources to help people help themselves.

The founders vision was to establish a multi-faceted organization that would provide a variety of programs and services designed to meet the needs of disadvantaged and low-income individuals who were not already being supported through government agencies, service clubs, or other charitable organizations. SOS would be there to fill in the gaps.

This grassroots movement of care humbly began by seeking residents who were willing to give of their time, talents and financial resources. SOS now offers more than 30 programs, many of which began more than 50 years ago - a powerful testament to the vision and commitment of our founders and those who followed in their footsteps.

“ It has helped my son make new friends, learn new skills, and be an active part of our community. I am so very thankful for this program that betters our children’s lives.” ~Mother of a youth program participant





# Hosting a Fundraiser

**This toolkit will help you generate ideas and plan a successful event to raise funds for SOS programs in your community. You'll find some helpful tips about promoting your event and much more.**

Your event could be a one day family event, or you may want to run a campaign over several months. It's up to you!

### **Once you've reviewed the contents of this toolkit, your next steps are:**

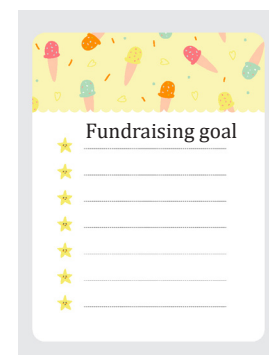
- Read the SOS Community Fundraising event policies and complete the registration form found in the Appendixes. Email or mail your signed form to the addresses indicated on the form so we can review and approve.
- Once we notify you with approval, you're ready to start! Please do not use the SOS name or begin to promote your event until you have approval.
- Set your fundraising goal.
- Review the tips for planning and promotion.
- Ensure your event will adhere to all current guidelines for COVID-19 physical distancing and hygiene measures as well as any legal or insurance policies if applicable.
- Have fun!

### **Here's support SOS can offer:**

- Answer any questions you may have as you plan and implement your event.
- Provide you with printed materials about SOS for your event participants.
- List and acknowledge your event via our social media channels and/or other media.
- Upon request, a staff or Board member may be able to attend your event depending upon availability.
- Issue charitable tax receipt/s where applicable.

### **Here's what we don't offer:**

- Volunteers for your event.
- Donor lists.
- Insurance coverage or liability for your event.
- Reimbursement for your fundraising expenses.





# Event Idea Generator

- Hold an outdoor or virtual event. A children's play, dance, puppet show, musical concert, etc. Charge admission for neighbours to attend or ask for donations if hosting online.
- Craft or art sale. Involve all ages in your creations for sale.
- Lemonade stand. Tried and true!
- Car wash. Work with a local car-wash or do your own in your driveway.
- Bake sale. Who doesn't love a yummy cupcake, muffin or cookie?
- Obstacle course. Make your own sports challenge event.
- Walk-a-thon, bike-a-thon (or any other "a-thon"). Make a theme and wear costumes. Collect pledges.



- Sew novelty face masks with proceeds to SOS.
- Birthday or special occasion. Have guests donate to SOS in lieu of gifts. Post on social media.
- Pet parade. Have guests pay an admission to dress up Fido or Puff for a special themed neighbourhood parade.





## Planning Your Event

Once you have brainstormed ideas and settled on the right one for your event, here are some things to include in your plan:

- **Date and time.** Determine the duration of your event or if it will be an ongoing campaign.
- **Location.** Where will you hold your event? Do you need to arrange parking? Do you need signage?
- **Safety.** If the event is indoors, how will you ensure health measures and physical distancing are in place?
- **Volunteers.** Who will be involved to help plan and implement your event?
- **Participants.** Who and how many participants will be involved?
- **Promotion.** How will you put the word out?
- **Fundraising goal.** Determine how much money you intend to raise for SOS and let your participants know.
- **Licenses, permits and insurance.** Does your event require a license, a permit and insurance?
- **Timeline.** Map out the critical dates for planning, implementing and thanking participants.
- **Budget.** Be realistic about your costs but keep them as low as possible. Make sure you include everything so there will be no surprises. Can you get anything donated? Your expenses should not exceed 20% of the funds raised for SOS.



# SOS Community Fundraising Toolkit



“

I know for many of us who are single parents raising our kids, this [TIC TAC program] has been an absolute life-saver.

I have enjoyed the Friday morning crafts for the parents, and I love Family Nights, doing an activity or going on an outing. Just being with others has been great and has given my daughter and I something fun to do together.” ~A TIC TAC and Family Night Program participant.

”



# Promoting your Event

The way you promote your event will likely vary depending on the type of event you are planning. But in all cases, you will want to get the word out early.

**Here are some methods you might want to consider:**

### Word-of-Mouth

This is always one of the best and most cost-effective ways to promote your event. Tell friends, family, and neighbours about your plans and ask them to spread the word through their networks if appropriate. If you're planning a virtual event, then the more the merrier!

### Social Media

Depending on the type of event and the numbers you can safely accommodate, social media can be a great way to spread the word. Facebook, Twitter and Instagram will tell the world what you're doing and might even inspire others to do something for SOS as well!

### Posters/Flyers

Another way to build excitement for your event is by creating posters. If this is a neighbourhood event, you might want to get the kids to make the posters and distribute them around the neighbourhood.

### Local Community Media

If you're planning a larger initiative (that adheres to current distancing guidelines),



then you should alert the local newspaper (The Parksville Qualicum Beach News) and the radio stations (88.5 The Beach and 99.9 The Lounge) about your event. Send a press release which includes “who, what, when, where and why,” along with your name and contact information when alerting the media to your event. You can also invite a reporter to attend your event and take pictures, or offer to take your own and send them afterwards.

# Event Day

**YEAH!** The big day is here. Remember, your efforts will be helping residents of District 69. That's something you can be proud of.

### Here's some things to be mindful of:

- First of all, **HAVE FUN!** Your positive energy will be felt by your volunteers and your event participants.
- Take lots of pictures to share with your friends and with SOS.
- Make sure to keep track of donors' names and contact information on the Event Donation Tracking Form in the Appendixes. This will help you when sending your thank you notes, and for SOS to send donation receipts (see page 10 for details on donation receipts).



## AFTER YOUR EVENT

It's important to thank your donors, volunteers and any sponsors who have provided free goods or services to help your event become a success. Sending them an email or mailing them a thank you card or a letter can go a long way in showing appreciation. It will also give them assurance that their donation will be going to SOS like you promised.

Once your event has concluded, please email SOS at [resource@sosd69.com](mailto:resource@sosd69.com) with a campaign update and share your photos so we can celebrate your event on social media.

Within 14 days of your event, please send your Donation Tracking Form and proceeds to:

### **Society of Organized Services**

Community Fundraising  
245 West Hirst Avenue  
PO Box 898  
Parksville BC V9P 2G9

**IMPORTANT NOTE:** Please do not send cash. For cash donations, please send one cheque made out to Society of Organized Services. After the event, event organizers must not retain any private donor information, including name, address, telephone number, donation amount and payment information. Please send all records to Society of Organized Services.



# Donations & Tax Receipting



SOS will provide donation receipts in keeping with Canada Revenue Agency (CRA) guidelines.

Some events such as galas, dinners or golf tournaments usually don't qualify for donation receipts, so once your event has been approved, we can advise you as to their eligibility.

SOS will issue donation receipts for eligible gifts of \$20 or more. If a donor makes a gift under \$20 and requires a donation receipt, please have them indicate this on the Event Donation Form.

Eligible donations requiring a tax receipt must include the donor's full name, address, phone number, amount donated and the payment type. Funds and donor information must be received by SOS before receipts can be issued.

For donations not requiring a receipt, please collect all funds and write one cheque with payment to Society of Organized Services for the total amount collected. Please do not send cash.

Thank you for the difference you'll be making!





# Thank You!



**Your support means the world to local children, youth and families. We hope you feel full heart happy!**

# SOS Event Policies

*In accordance with Canada Revenue Agency (CRA) guidelines and for the benefit of District 69 Society of Organized Services (SOS) as well as the SOS Community Fundraising Initiative Organizer, SOS has established the following policies and guidelines to assist individuals and groups in raising funds for the benefit of SOS.*

### **Third Party “Community Fundraising Events”**

SOS is pleased to be the recipient of funds raised by individuals, organizations and/or businesses who engage in fundraising activities. Such initiatives are considered Third Party “Community Fundraising” initiatives. This means that initiative organizers are responsible for the organization and promotion of the initiative and SOS is the recipient of funds generated from the initiative.

Any initiative associated with the SOS name must promote and maintain a positive image. Associating the SOS name with your initiative must have the proper approval from SOS.

### **Getting Started: Application Form**

Prior approval is required for all fundraising initiatives done on behalf of SOS. Any individual, business or organization wishing to conduct a fundraising initiative on behalf of SOS must first complete the SOS Community Fundraising Registration Form.

Please hold off on using the SOS name in your promotional materials until you have received approval by SOS in writing.

### **Fundraising Practices**

SOS reserves the right to decline participation in any fundraising application that does not fall within our mandate. In addition, SOS does not obtain third party lottery licenses, third party insurance or special initiative insurance on behalf of organizations fundraising in support of SOS.

SOS will not be responsible for debts incurred by those using the SOS name for fundraising initiatives. SOS will need to be provided with a budget prior to the initiative and an overall financial net gain after the initiative. Don't worry, we can walk you through this!

SOS will not engage in third party initiatives that contain a commission component for compensation. Any compensation of third-party individuals or groups must be clearly outlined in the initiative budget as a part of the application process. Preference will be given to third party initiatives that are volunteer organized.

# SOS Community Fundraising Toolkit

## Publicity & Material Approval

All promotional materials that contain the SOS name or logo, or the name or logo of its affiliates, must first be approved by SOS.

The initiative organizer agrees to send samples of all materials using SOS's name or logo to SOS for approval prior to production. Examples of these can include, but are not limited to, print or online ads, invitations, signage, media advisory, and other media.

SOS will have final, signed approval on all promotional materials. You are welcome to respond to media inquiries regarding your fundraising initiative; however, for all media inquiries regarding SOS, we ask that they be referred directly to SOS.

## Donations and Sponsorships

The initiative organizer will provide SOS with a list of sponsors before approaching them. This information will allow for SOS to better recognize partners within the community and allows for identification of any overlap in solicitation approaches.

SOS will have final approval of the solicitation of all sponsors.

After the initiative organizer secures sponsors, they will provide SOS with a description of the donation and/or sponsorship, plus its retail value, as well as contact information. SOS will not solicit sponsors on behalf of initiative organizers, nor provide contacts for sponsors.

## Guaranteed Minimums

SOS will not be responsible for holding the budget for any third-party initiative.

The initiative organizer will be responsible for any expenses or revenue incurred before, during or after the initiative. SOS understands that it is often challenging to know how much your fundraising initiative will generate, especially if it is a first-time initiative. However, it is important to set a fundraising goal. Therefore, we do ask that you provide us with a realistic estimate of what you expect to raise on behalf of SOS.

We may also ask for a guaranteed minimum if there is a risk that the expenses of your initiative will be so high that very little donation will be made. Guarantees can help ensure that the organization and the donor are both getting maximum benefit.

## Tax Deductions

Official receipts for tax purposes will be issued in accordance with Canada Revenue Agency guidelines.



# SOS Community Fundraising Toolkit

## How SOS can help:

- Providing initiative planning advice.
- Promoting your initiative through SOS's social media channels such as Facebook and Instagram.
- Providing SOS information (brochures etc.)
- Attendance of a representative from SOS, when appropriate, to make a speech or for photo opportunities.
- Providing your organization with recognition through a thank you letter or certificate of recognition, thank you via social media channels or in an online newsletter.

## Unfortunately, SOS is not be able to:

- Reimburse any initiative expenses.
- Guarantee attendance or volunteers at your initiative.
- Share our mailing lists.
- Solicit corporate sponsorships or any other in kind or monetary gifts.
- Assist with applications for gaming licenses or insurance of any kind.
- Hold the budget or make any decisions regarding finances of the initiative.

## Other guidelines:

- It is the initiative organizer's responsibility to communicate to volunteers, sponsors, and participants that SOS is the beneficiary of the initiative and not conducting the initiative.
- All publicity (including media releases, interviews, promotional material, etc.) for the proposed initiative should be distributed to SOS.
- SOS will not assume any financial or legal liability along with any damages that may be incurred prior to, at the initiative or post the initiative.
- The initiative organizer will acquire all essential insurance, permits and licenses.
- The initiative organizer will provide reasonable notice of any third-party initiative cancellation.

**Thank you for considering Society of Organized Services for proceeds from your community fundraising initiative. Please know that your efforts will make a big difference to residents of District 69!**

# SOS Community Fundraising Registration Form

Thank you for your interest in raising funds to help SOS deliver programs and services for District 69 residents of all ages in need of assistance. SOS was built by community to serve community and we are grateful for your support. Thank you!

SOS needs to review and approve your community fundraiser before you start planning the event itself. To make sure we understand your event and how we can help, please complete this form and either email or mail it to the addresses below. When your application is officially approved, you will be notified.

You can send this form by:

Email: [resource@sosd69.com](mailto:resource@sosd69.com)

or Mail:

Society of Organized Services

245 West Hirst Avenue

PO Box 898

Parksville BC V9P 2G9

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## CONTACT INFORMATION

Name of Organizer: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone (Home/Cell): \_\_\_\_\_ (work): \_\_\_\_\_

Email: \_\_\_\_\_

Are you under the age of 18? ☐ Yes ☐ No

If yes, please provide name of your parent or guardian: \_\_\_\_\_

# SOS Community Fundraising Toolkit

## EVENT INFORMATION

Event Name: \_\_\_\_\_

Purpose of Event: \_\_\_\_\_

Type of Event: ☐ One-Time ☐ Ongoing

Event Date(s): \_\_\_\_\_

Event Location: \_\_\_\_\_

Please describe your event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Target Audience: ☐ Family/Friends ☐ General Public ☐ Other \_\_\_\_\_

Anticipated number of participants/attendees: \_\_\_\_\_

Will this be an exclusive fundraiser for SOS, or will there be other organizations benefiting and if so which ones? \_\_\_\_\_

How do you plan to promote your event? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What motivated you to hold this event? \_\_\_\_\_

\_\_\_\_\_

Do you require any SOS literature at your event? ☐ Yes ☐ No

Do you require a representative from SOS at your event? ☐ Yes ☐ No

If yes, please explain role of representative: \_\_\_\_\_



# SOS Community Fundraising Toolkit

## FINANCIAL INFORMATION

How will you raise the funds (ticket sales, general donations, etc.)?

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What price will you charge for each activity (i.e. cost of tickets etc.)?

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Please provide your best estimate of the following budget information:

- |    |  |         |
|----|--|---------|
| A. | Total Expected Income (donations, ticket sales, food etc.) | \$_____ |
| B. | Expenses (i.e. promotion, food, rentals, etc.)             | \$_____ |
| C. | Anticipated Net Donation to SOS (A - B = C)                | \$_____ |

Note: Costs should not exceed 20% of funds raised. SOS will not accept responsibility for any event costs.

Will you be engaging in any gaming activities? If so, please provide details on type of gaming along with your provincial government gaming permit number: \_\_\_\_\_

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Will you be securing sponsors for your event? ☐ Yes ☐ No

If yes, please list the prospective sponsors you would like to involve, prior to approaching: \_\_\_\_\_

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Please read and sign below.

I/we have read and agree to SOS event policies and acknowledge that Society of Organized Services will not assume any legal or financial liability for the event as outlined in this registration form. Furthermore, I/we understand that Society of Organized Services must approve, prior to any printing and distribution, any use of its name or logo.

**Submitted by:**

\_\_\_\_\_  
(Event Organizer Signature)

\_\_\_\_\_  
Date

**Approved by** (for internal use):

\_\_\_\_\_  
(SOS Representative Signature)

\_\_\_\_\_  
Date

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# SOS Community Fundraising Toolkit

## SOS COMMUNITY FUNDRAISING Donation Tracking Form

Event Name: \_\_\_\_\_

Event Organizer (name, phone, email): \_\_\_\_\_

Donation receipts for income tax purposes will be used for monetary donations of \$20 or more. All contact information as indicated below, must be recorded to be eligible for a receipt. Please submit this form with event proceeds within 14 days of your event to: Society of Organized Services, 245 West Hirst Avenue, PO Box 898, Parksville BC V9P 2G9. Charity Business # 107021537 RR0001

Name	Address	City/ Prov	Postal Code	Phone	Email	Donation Amount	Cash/ Cheque	Tax Receipt required? Y/N

Copy out this sheet for additional donations

Page # \_\_\_\_\_ of \_\_\_\_\_