St. Joseph’s Hospice
Event Handbook

A toolkit for organizing your own fundraiser to support St. Joseph’s Hospice

St. Joseph’s Hospice
485 Windermere Road, 3rd Floor
London, ON N5X 2T1

Phone: 519-438-2102
Fax: 519-438-9833

www.sjhospicelondon.com
Charitable Registration Number: 83832 6109 RR0001
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ABOUT ST. JOSEPH’S HOSPICE

Comfort, Care and Compassion

At the end of our lives, what do we wish for most? For many people it is to be surrounded by family and friends and treated with love, comfort and dignity.

One of the few universal issues we will all face is death. And how we die is something we can affect. We can’t solve for death but we can design ways to create a graceful, dignified end of life.

Hospice palliative care is a philosophy of care that provides dignity at the end of life by supporting the whole person – body, mind, and spirit. When people come through the doors at Hospice, we embark on a profoundly personal journey with them and their loved ones. We are privy to moments of heartfelt emotion and are both humbled and grateful to play a role in caring for them at one of the most difficult times in their lives.

St. Joseph’s Hospice is a faith-based organization that provides quality of life at the end of life, offering compassionate holistic care and support to people living with a terminal illness. Support is extended to their family members and caregivers, and to those grieving the loss of a loved one. Hospice programs and services are offered at no cost and are available irrespective of age, gender, religion, race, ethnicity or economic status.

Whether in the community, Wellness Centre, or 10-suite residence, St. Joseph’s Hospice provides specialized programs and care with a person-centred approach. Individuals and families are intimately involved in creating their own care plan that best addresses their unique needs. Our Hospice staff and volunteers work together as a team with other community partners to provide full support and quality hospice palliative care.

Hospice palliative care is not funded the same way hospital care is funded. We receive less than half of our operating budget (48%) from the Ministry of Health and Long Term Care and must raise the balance (52%) each year. This amounts to raising more than one million dollars each year to support those we serve.
What is Third Party Fundraising?

Thank you for taking the initiative to be a leader in your community and raise funds for St. Joseph’s Hospice. We are grateful you have decided to partner with us. It is people like you that make our community strong and vibrant.

“Third party fundraising” is an event or activity organized by an individual, company or community organization that is not an official St. Joseph’s Hospice event but benefits the work St. Joseph’s Hospice does.

Acting independently and with St. Joseph Hospice’s approval, third party events are crucial in raising funds for our services and programs for the terminally ill, their caregivers and loved ones. When you organize a third party event, you’re not only raising money to support St. Joseph’s Hospice, you are also raising awareness about us and the important work we do.

Thank you for your commitment and partnership!

ORGANIZING YOUR FUNDRAISER

Getting Started

This Toolkit was created to help you get started with your fundraising efforts. We have filled it with valuable tips to help your event be successful from event ideas and promotional strategies, to steps to securing donations for your event.

We have also included important procedures and guidelines to take into consideration when planning your activity. As we are mandated to adhere to Canada Revenue Agency’s operating and legal standards, we kindly ask you to read this package carefully and contact us with any questions.

Finally, as a third party fundraiser, we ask that you fill out and send us the Third Party Fundraising Application Form in Appendix A.

Questions?

Contact Amanda Hickey, Special Events Coordinator:

Phone: 519-931-3463
Email: amanda.hickey@sjhospicelondon.com
Ideas for a Successful Fundraiser

Want to raise funds for St. Joseph’s Hospice but don’t know how? The following list of easy-to-do activities can help you generate ideas (and money):

**Quick & Easy Ideas**
- 50/50 Draw
- Jar Guesses (Candy, coins, jellybeans, chocolate, etc.)
- Raffles (Please adhere to your city and province’s licensing rules and regulations)
- Bake Sale
- Donations in lieu of birthday, wedding or other celebration gifts
- Auctions (gift baskets, cake, dessert, wine, art, etc.)
- Book Sale
- Car Wash
- Flower or Plant Sale

**Ideas Requiring More Planning**
- Trivia Night
- Music or live entertainment
- Craft Night and Sale
- Movie Night
- Yard Sale
- Bingo or Card Night
- Participation A-thons (running, walking, cycling, bowling, swimming, etc.)
- Sports tournament (hockey, baseball, golf, etc.)
- BBQ Day
- Candy-Grams (Valentine’s Day, Halloween, Christmas)

**Have a Plan**

The success of your fundraising event hinges on having a good plan. The following tips will help you start your planning off on the right foot. Also, take a look at the Sample Action Plan in Appendix B.

**Audience**

Who are you trying to attract to your event? When you know your target audience you can customize the details, logistics and promotion of your event to best suit this audience.

**Test Your Idea**

Brainstorm with your potential audience, friends, family and colleagues on your fundraising ideas. Is this something that they would likely attend/or give?
• Don’t Recreate the Wheel
Don’t start with a blank page if you don’t have to. Find resources on the Internet or speak to people who have hosted a similar event in the past. We may be able to connect you with some helpful resources as well. You will gain a wealth of valuable information on what works and what doesn’t to help you run a successful event.

• Build Your Team
Working with a team of people will make life easier. Ask friends, family and colleagues to help plan your event. Make sure everyone knows and understands their role and responsibilities and stay in close communication so everyone is on the same page.

• Set a Goal
Set a realistic fundraising goal to motivate your team and supporters. Having a clear goal gives everyone something exciting to work towards and can encourage supporters to be more generous.

• Keep Your Costs Low
Try to keep expenses to a minimum so you can retain the highest percentage of proceeds for donation. Consider locating in-kind donations; take a look at the section on How to Get Donations and Sponsorships in this toolkit to help you.

• Don’t Overcommit
Build your confidence and experience gradually by hosting a small event at first and working your way up to organizing larger ones. Be sure to give yourself plenty of time to organize and execute your event. Keep in mind as well that events typically do better in their second or third year.

• Timing is Everything
Look into whether there are any competing local events for the date and time you have chosen. You may also increase your event’s appeal by having it coincide with special holidays like St. Patrick’s Day, Family Day, Valentine’s Day, Canada Day, etc.

• Have a Plan B
Make sure you have a contingency plan, especially if your event is dependent on unpredictable factors like the weather.
**Promoting Your Event**

One of the most important keys to the success of your fundraising event is getting the word out. Here are some ideas to create a buzz for your event through word-of-mouth, emails, posters, flyers, online and media activities.

**Advertise well in advance**
Depending on the scale of your event, you need at least two weeks to advertise your event, but two months will yield greater turnout. Letting people know about your event well in advance gives them time to coordinate their schedules and pass the word on to their own networks.

**Posters and Flyers**
When designing your own poster or flyer please send it to us for approval first. Be sure to include all of the important details of your event and the 5 Ws: who, what, where, when and why. Put up your posters where your audience is: at work, sports facilities, community centres, schools, colleges, libraries or stores. Please ask first before you post!

**Online Promotion**
Social media sites like Facebook and Twitter, email and text messaging are free and effective ways to spread the word about your event. Ask your contacts to forward the details of your fundraiser on to their friends and family. Look into local online event calendars such as municipal, community centre and community news websites and ask if they will accept a posting for your event. You may also contact us at St. Joseph’s Hospice and we will help you promote your fundraiser through our various marketing mediums and social networks.

**Word-of-Mouth**
Often a personal connection can make the difference. Tell people about your event in person and have them tell their friends as well.

**Media**
All press releases pertaining to St. Joseph’s Hospice must be sent through St. Joseph’s Hospice.

If the media or a reporter contacts you, give them the details about your event and why you’re organizing it. If the reporter has any questions about St. Joseph’s Hospice, please refer them to St. Joseph’s Hospice directly. Because of the sensitive nature of our organization, it is imperative that correct information is given so as not to compromise our privacy policy.
Creating a Budget

Working with a budget will ensure you keep your expenses in check and fundraising goals on track. It will give you a valuable bird’s eye view of the cash flow of your event and help you identify where you can look into getting supplies or services donated (See the section on How to Get Donations and Sponsorships in this toolkit).

An important note: When holding a fundraising event for St. Joseph’s Hospice, you must submit your budget to us for tax receipting purposes.

Below is a budget template to get you started on outlining your estimated revenue and expenses and track them against funds received and actual costs. The Sample Budget Template is also available for your use in a working Excel spreadsheet. Please feel free to get in touch with us if you have any questions about creating or submitting your budget. We are here to help you maximize your fundraising efforts!

**Sample Budget Template**

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<thead>
<tr>
<th>Revenue</th>
<th>Projected</th>
<th>Actual</th>
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</thead>
<tbody>
<tr>
<td>Line 1 (E.g. Sponsorship)</td>
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<td></td>
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<tr>
<td>Line 2 (E.g. General Donations)</td>
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<td></td>
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<tr>
<td>Line 3 (E.g. Ticket Sales)</td>
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<td></td>
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<tr>
<td>Total Revenue (A)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Projected</th>
<th>Actual</th>
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</thead>
<tbody>
<tr>
<td>Expense Item 1 (E.g. Printing)</td>
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<tr>
<td>Expense Item 2 (E.g. Venue)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Item 3 (E.g. License Fees)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Expenses (B)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Projected</th>
<th>Actual</th>
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</thead>
<tbody>
<tr>
<td>Balance</td>
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</tbody>
</table>
How to Get Donations and Sponsorships

A great way to keep your expenses down and boost your fundraising success is to solicit sponsorships or gift in-kind donations of food, prizes, supplies or services from corporations or local businesses.

The first step in securing donations from local businesses is to send them a letter explaining who you are and what you are requesting from them. Plan ahead of time, you want to send the letter out far enough in advance of your event to give potential donors time to respond to your request. Remember, everyone is busy. It is good practice to follow up your request letter with a phone call. To assist you with your donation requests, check out the Sample Solicitation Letter in Appendix C.

It can be beneficial to reach out to prospects that you or someone you know has a personal connection with. These relationships can help you be even more successful in securing donations for your event. Don’t forget to mention your connection in your letter.

Decide if and how you will acknowledge donors or sponsors during your event. This will be important when trying to solicit their support for larger donations or sponsorships. If you secure large donations or sponsorships you want to guarantee your sponsors a certain amount of publicity. Think about including their business name or logo on event posters and printed materials, banners, t-shirts or allow them to host a booth at your event. Please let your contact at St. Joseph’s Hospice know who your sponsors are.
Event Planning “To Do” List

Planning

- Register the third party fundraiser with St. Joseph’s Hospice by filling out and submitting an application form 4-6 weeks prior to my event.
- Enlist a volunteer committee to help with event coordination.
- Identify target audience.
- Finalize event idea.
- Draft an event budget.
- Set a date, time and location for the event.
- Set a fundraising goal for the event.
- Identify any sponsorship needs.
- Develop an event timeline and/or action plan.
- Come up with a promotional strategy.

Pre-Event

- Apply for any necessary licenses, permits and insurance.
- Solicit and secure sponsorships.
- Develop promotional materials and distribute them based on marketing strategy.
- Create an event-specific “to do” list and assign tasks to volunteers.
- Designate who will handle money and how donations will be collected at the event.
- Consult St. Joseph’s Hospice if in need any additional support.

During the Event

- Ensure volunteers have clear directions and are prepared to execute their roles.
- Collect all funds from attendees, donors and sponsors.
- Publicly thank everyone.

Post-Event

- Pay all invoices in full.
- Submit proceeds and Donation Tracking Sheet for tax receipting purposes to St. Joseph’s Hospice within two weeks of your event.
- Hold a post-event committee meeting to evaluate the event. Take note of what worked and what didn’t and learn from mistakes.
- Thank and recognize all sponsors and volunteers.
- Celebrate your hard work – you deserve it!
- Start planning next year’s festivities.
Third Party Event Guidelines

Your contribution makes a direct impact in the lives of those we serve, and we thank you for your consideration in planning an event to benefit St. Joseph’s Hospice.

It is important to note that St. Joseph’s Hospice must ensure that all Third Party Events run on our behalf support our organizational objectives and promote a positive public image, and are consistent with our mission statement and values.

By providing us with a completed Third Party Event Contract, we will be aware of your plans and will know how best we can assist you. Please submit this form no later than 4 weeks prior to your event.

Please read the following guidelines:

1. Complete the Third Party Event Contract and submit to St. Joseph’s Hospice 4-6 weeks prior to your event for review – ALL THIRD PARTY EVENTS NEED TO BE APPROVED BY ST. JOSEPH’S HOSPICE PRIOR TO THE EVENT TAKING PLACE.
2. Once the Third Party Event Contract has been reviewed and approved, St. Joseph’s Hospice will request that this document be signed by both parties.
3. All event proceeds must be received by St. Joseph’s Hospice within 30 days of the event.
4. Full contact information for donors must be sent to St. Joseph’s Hospice within 30 days of the event for tax receipts to be issued.
5. A post event financial summary must be sent to St. Joseph’s Hospice within 30 days of the event – you are responsible for keeping accurate records of the event.
6. St. Joseph’s Hospice will not assume any legal or financial liability associated with the event.

You are responsible for the following:

- Your own mailing list for the special event;
- Obtaining all necessary permits, licenses or insurance*;
- Arranging pickup and delivery of St. Joseph’s Hospice promotional materials (banners, brochures, etc.)
- Obtaining prior approval from St. Joseph’s Hospice before asking a business or company for a donation of goods or services for your event;
- Notifying St. Joseph’s Hospice if the event is cancelled prior to the scheduled event day.

*Third Party Events are not part of St. Joseph’s Hospice operations and as we aren’t running/organizing/controlling them, there is not any coverage under our insurance policy for the group/individual planning the event.
How we can help:

We are very grateful for your support and enthusiasm and are available to assist you in the following ways:

- Provide you with a St. Joseph’s Hospice representative who will act as a liaison between St. Joseph’s Hospice and your event coordinator
- Supply an approved St. Joseph’s Hospice logo to be used on all of your promotional material – no party may use the St. Joseph’s Hospice logos without consent of the Development and Community Relations Department
- St. Joseph’s Hospice must review and approve all promotional material prior to its production and distribution. This includes, but is not limited to, invitations, newspaper or newsletter articles, etc.
- Provide agency-specific support material to be made available at the event (e.g. flyers, brochures, handouts, banners, etc.)
- Prepare and send thank-you letters to all donors who provided contact information
- Issue tax receipts directly to donors
- Recognize your event in the next issue of our newsletter
- Information about St. Joseph’s Hospice can be easily found online at http://www.sjhospicelondon.com, or you can contact us directly if you can’t find what you are looking for on our website
- If you wish to have our brochures or banner at your event, please let us know so we can arrange a time for you to pick them up. Our banners are used at different events throughout the year and we asked that they are returned to us in the same condition as when you received them. Please provide St. Joseph’s Hospice with two weeks’ notice if organizational brochures are required for your event as we only carry a limited supply.

Thank you for your interest in supporting St. Joseph’s Hospice. We couldn’t provide the quality of care that we do at no cost to those who use our services without the support of our generous community.

Questions?

Call Amanda Hickey at 519.931.3463 or email amanda.hickey@sjhospicelondon.com
Tax Receipts:

Tax receipts MUST be issued by St. Joseph’s Hospice. If donors ask for immediate tax receipts, please inform them that—as per Canada Revenue Agency (CRA) guidelines—an official tax receipt will be mailed out by St. Joseph’s Hospice.

Any tax receipts issued without St. Joseph’s Hospice’s knowledge or consent can affect St. Joseph’s Hospice’s creditability as a registered charitable organization. For this reason, it’s imperative that detailed records are kept for each individual donor. These records are then submitted to the CRA for accounting purposes and potential audit.

Only donations of $20 or more are eligible for a charitable tax receipt. Please see APPENDIX E on the last page of this toolkit. Please ensure to properly track each donor as each person is legally entitled to a tax receipt for his or her donation of $20 or more.

The following gifts are NOT eligible for tax receipts:

- Any form of sponsorship
- Donations under $20
APPENDIX A: Third Party Fundraising Application Form

CONTACT INFORMATION

Organization Name:
______________________________________________________________________

Contact Name:
______________________________________________________________________

Address:
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

City: Province: Postal Code:
____________________________________________________________________________

Phone: _______________________Fax:________________________

Email:____________________________

Company Website (if available):
_______________________________________________________________

Please select a category that best describes your group/organization:

□ Corporation         □ School          □ Community Service Club          □ Individual

GENERAL EVENT INFORMATION

Event Name: Event Description:
____________________________________________________________________________

(Append any additional details you feel would help describe your event)

Date(s): ______________

Time: ______________

Location & Address:
____________________________________________________________________________

Is this event open to the public? □ Yes   □ No

Will this be an annual event? □ Yes   □ No
PAST EVENTS

Have you previously organized a third part event for St. Joseph’s Hospice?  □Yes  □No

If yes, briefly describe the event:______________________________________________________________

How much money was raised?  $___________________

Will any other charities receive proceeds from the event?  □Yes  □No

If yes, who?:
____________________________________________________________________

Please note that St. Joseph’s Hospice must approve any and all name and logo usage and have final approval prior to printing.

Do you plan on using St. Joseph’s Hospice’s name and logo in your event promotion?  □Yes  □No

What kind of St. Joseph’s Hospice promotional materials will be required?
□Brochures
□Posters
□Display Screens
□Website
□Other:

FINANCIAL INFORMATION

In an effort to assist you in the preparation of a successful event, please indicate how you will generate revenue for St. Joseph’s Hospice:
□Ticket Sales/Entry Fees
□Raffle Draws
□Live/Silent Auction
□Cash Donations
□Sponsor Merchandise
□Sales
□Other

If generating income through Ticket Sales/Entry Fees, please indicate what percentage will be donated?

Anticipated event revenue: $___________________
ST. JOSEPH’S HOSPICE INVOLVEMENT

Due to staff limitations and the volume and scope of other events organized on behalf of St. Joseph’s Hospice, staff and volunteers cannot provide support to plan and promote events. St. Joseph’s Hospice will do whatever possible to ensure that staff and/or volunteers will be available to attend the event, but requests for such a presence will be handled on a case-by-case basis and cannot be guaranteed.

St. Joseph’s Hospice will advertise your event for 30 days prior to your event date on the St. Joseph’s Hospice agency website – [www.sjhospicelondon.com](http://www.sjhospicelondon.com)

MARKETING AND PROMOTIONS

The marketing and promotion of Third Party Events must be done by the Event organizer. Upon approval of your event, St. Joseph’s Hospice will post it in the Events Section of our website.

Approval must be obtained for the use of the St. Joseph’s Hospice name and logo, and St. Joseph’s Hospice must pre-approve all promotional materials before distribution.

All materials must clearly indicate that the event is in support of St. Joseph’s Hospice. It is important that the St. Joseph’s Hospice name and logo be used correctly and spelled properly. Always refer to the organization as St. Joseph’s Hospice.

**Please submit this form within 4-6 weeks prior to your event**
Please read the following and sign below:
I agree that the St. Joseph’s Hospice name and logo are registered trademarks. Prior to publicizing or holding an event, the Director of Community Engagement & Development of St. Joseph’s Hospice must approve this proposal and use of the name or logo. By publicly naming St. Joseph’s Hospice as the beneficiary of my event I agree to donate the full amount of proceeds raised within 30 days following the event.

X
3rd Party Event Applicant

Date:_____________________________

X
Marisa Kanas, Director
Community Engagement & Development

Date:_____________________________

Acknowledgement of your application will be forwarded to you within 10 business days.

CONTACT INFORMATION

Amanda Hickey, Special Events Coordinator
St. Joseph’s Hospice
485 Windermere Road, London, ON N5X 2T1
T: 519-931.3463
F: 519-438-9833
Amanda.Hickey@sjhospicelondon.com
www.sjhospicelondon.com
APPENDIX B: Sample Action Plan

After brainstorming your event, incorporate your decisions into a list of what needs to be done and when, who is going to it and what resources are needed.

Here’s an example:

<table>
<thead>
<tr>
<th>EVENT</th>
<th>GOAL:</th>
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</thead>
<tbody>
<tr>
<td>EVENT DATE:</td>
<td></td>
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<tr>
<td>TASKS: What will be done?</td>
<td>ROLES: What will do it?</td>
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<tr>
<td>1.</td>
<td>1.</td>
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<tr>
<td>2.</td>
<td>2.</td>
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<td>3.</td>
<td>3.</td>
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<td>4.</td>
<td>4.</td>
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<tr>
<td>5.</td>
<td>5.</td>
</tr>
</tbody>
</table>
Dear ____________,

We are pleased to be able to invite you to **EVENT NAME** on **EVENT DATE** (including day of week) at **EVENT VENUE** in support of St. Joseph’s Hospice.

This event will help provide vital services and programs to people with palliative illness, as well as those in their life circle. Your generosity and participation is deeply meaningful, and we invite you to join us in supporting this important cause.

[[Include all pertinent details about the event in one or two paragraphs. Be sure to build excitement and appeal to the senses.]]

As a leader in our community we hope you will consider supporting our event. St. Joseph’s Hospice relies upon the generosity of our community to fund 52% of its annual operating budget, equivalent to more than $1 million per year. Supporters like you play a pivotal role in providing the funds needed to support people as they journey to the end of life. *Thank you.*

An **EVENT NAME** committee member will be in touch over the next few weeks to further discuss this opportunity. In the meantime, if you have any questions or would like more information, please feel free to me at [[insert phone number here]].

Thank you for considering our invitation. We hope you will join us at **EVENT NAME**.

Sincerely,

**YOUR NAME AND SIGNATURE**
APPENDIX D: Sample Thank You Letter

DATE

ADDRESS

ADDRESS

ADDRESS

Dear ____________,

On behalf of EVENT NAME, I would like to thank you for your generous contribution. Together we raised $0000 for vital services and programs offered at St. Joseph’s Hospice. Thank you for contributing to such a worthwhile cause.

The generous patrons of events such as ours enable St. Joseph’s Hospice to make a meaningful difference in the lives of those with a life-limiting illness, as well as those in their life circle.

[[RECAP HIGHLIGHTS FROM THE EVENT]]

Once again, for the many people that will benefit through the proceeds from EVENT NAME, I thank you.

I hope to see you again next year! [[If the event will occur again]].

Sincerely,

YOUR NAME AND SIGNATURE

Third Party Event Name & Logo
APPENDIX E: Donation Tracking Sheet for Tax Receipting

Event Name:_________________________________________________________________________________

Event Organizer (Name, phone/email): __________________________________________________________

Charitable receipts for income tax purposes will be issued for donations $20 and greater. Tickets, raffles and sponsorship do not qualify. All contact information including name, mailing address, phone number and email must be recorded. Receipts will only be issued for monetary donations. Please drop off this tracking sheet with the proceeds from your event in person to the attention of Amanda Hickey at:

**St. Joseph’s Hospice, 485 Windermere Road, 3rd Floor, London, ON N6A 5M2.**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City/Prov</th>
<th>Postal Code</th>
<th>Phone Number</th>
<th>Email</th>
<th>Donation Amount</th>
<th>Cash/ Cheque/ Online</th>
<th>Tax Receipt Required (Y/N)</th>
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Total

Charitable ID #: 83862 6109 RR0001
APPENDIX F: Sample Social Media Posts

Twitter Update: Join us at EVENT NAME on DATE with proceeds supporting @sjhospicelondon: EVENT URL (Use relevant hashtags if appropriate)

LinkedIn Update: Looking forward to a great evening/day in support of @sjhospicelondon on DATE! EVENT NAME: URL

Or

Simply post the event URL on its own on LinkedIn - this will autofill your status update with copy from the event webpage:

Instructions for posting a LinkedIn update

1. Log into your LinkedIn account, and select the ‘Home’ tab at the top of your screen.
2. In the field where it says ‘Share an update’, enter one of the sample messages provided, or create your own.
3. To add an image (this step is optional), select the image icon in the top-right corner of the ‘Share an update’ field, and upload an image file that you have saved to your desktop, such as the event attached image file.
4. Click ‘Share’.
Done!

Facebook Update: Join us at EVENT NAME on EVENT DATE (including day of week) at EVENT VENUE in support of St. Joseph’s Hospice. It will be an exciting evening/day of [[briefly explain what the event is about]]. This event will help provide vital services and programs to people with terminal illness, as well as those in their life circle. Register today: EVENT URL
APPENDIX G: Sample Invite

EVENT NAME (or horizontal event banner)
in support of St. Joseph’s Hospice

Event Description: One or two sentences to describe the event and engage your audience.

Event Details:
- Date
- Time
- Location
- Cost
- Other logistics

Registration Button or Link
Contact Information (name, phone #, email & web)

Insert event image or graphic here. Include sponsor logos or names if part of sponsorship agreement.