



# Event *Planning* Kit





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*Innovation* through funding  
*Excellence* with passion  
*Commitment* without question



# *Event Ideas*

A well executed event starts with a great idea and planning. The following is a list of ideas for you to build upon and use.

- ☛ “Thons” - bowl-a-thon, walk-a-thon, read-a-thon
- ☛ Walking / running events
- ☛ Silent auction and dinner
- ☛ Concert / music event
- ☛ “Sales” - yard sale, book sale, bake sale
- ☛ Golf / mini-golf tournament
- ☛ Three-on-three basketball tournament
- ☛ Poker / Euchre tournament
- ☛ Regatta
- ☛ Car wash
- ☛ Jail and bail
- ☛ Toonie drive
- ☛ Stair climb
- ☛ Quiz night
- ☛ Scavenger hunt
- ☛ Art / talent show
- ☛ Fashion show

Baba's High Tea  
May 29, 2016



Durocher Charity Classic  
September 16, 2017



St. Clair Insurance Brokers Curling Bonspiel  
February 28, 2017

# Start Here

Before planning your event, it is important to consider your end goal or goals.

Start by thinking about whether it is more important to raise awareness or funds, and whether you have the resources to reach your goals.

Some events raise money,  
But less awareness

- ☛ More exclusive
- ☛ Fewer individuals in attendance
- ☛ Higher individual cost to attend
- ☛ Lower administrative and advertising expenses
- ☛ More exclusivity for sponsors
- ☛ Attendees typically have greater loyalty to the cause

Some events raise awareness,  
But less money

- ☛ Wider appeal
- ☛ Often require a bigger investment of time, people and money
- ☛ Larger attendance
- ☛ Higher visibility
- ☛ Higher administrative and advertising costs
- ☛ Attendees typically have less loyalty to the cause

What is the purpose of your event?

- To raise money
- To bring attention to the mission or cause
- To increase public awareness
- Some combination of all of the above

What are the goals of the event?

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What will the event's theme be?

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What is your event vision? (Highest expectation from attendees)

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Who is your target audience and what are your attendance goals?

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What does your event offer to your audience and participants?

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Are there speakers or performers available that will generate interest in the event?

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Do you have adequate resources to produce the event (funds and time)?

Yes                       No

Where will the event be hosted?

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# *Event Committee*

Some beginning tips for developing the perfect event planning committee:

- Develop roles and responsibilities for committee members
- Know your target audience, who you choose for your committee can impact your reach
- Include those who have a close connection to the event host, or those who are close to the target audience
- Keep minutes of meetings with action notes for follow-up

## Example Committee Positions

Event Chair: \_\_\_\_\_

- Oversees the event and planning process
- Schedules Tasks and Due Dates
- Recruit Volunteers
- Motivate committee members
- Responsible for Final Decisions
- Establish the event budget
- Ensure communication between members is successful and productive
- Communicate member responsibilities



Director of Fundraising & Community Outreach: \_\_\_\_\_

- ☛ Develop fundraising goal with Chair
- ☛ Create a list of possible donors with up-to-date contact information and donation history
- ☛ Develop an info packet for the event (request letters/protocol, donation forms, and tax receipt guidelines) for members
- ☛ Encourage people to donate

Coordinator of Communications & Promotions: \_\_\_\_\_

- ☛ Oversees all marketing design, printing, and planning for the event
- ☛ Find, and research, all promotional opportunities and create a schedule
- ☛ Find and hire contractors as needed for graphic and web work
- ☛ Oversee design of printed materials, including sponsor recognition
- ☛ Oversee event website content and layout
- ☛ Establish Media Invitation Lists, select take-aways or thank you gifts, and post-event thank you's

Director of Logistics: \_\_\_\_\_

- ☛ Acquire, allocate, and ship event assets and equipment where needed
- ☛ Work with other Coordinators and Directors to balance scheduling
- ☛ Manage secure storage and delivery for event materials
- ☛ Responsible for event set up/ breakdown details, track and update campaign/event deliverables
- ☛ Communicate event budget requirements
- ☛ Responsible for re-ordering and replacement of campaign materials

Volunteer Coordinator: \_\_\_\_\_

- ☛ List potential and current volunteers and their respective responsibilities
- ☛ Create a protocol for recognizing volunteers for their assistance
- ☛ Create a meaningful, fun, and fulfilling experience for volunteers
- ☛ Work with the committee to create a volunteer schedule, including replacement help as needed

# SWOT Analysis

The completion of a SWOT analysis will allow you to develop the perfect strategy to reach your target market, while giving you a brief window into what your competition is doing. The points added to this analysis must be specific.

The Strengths and Weaknesses section refers to internal qualities that are within control of your brand. These things can be changed by the company when acted upon.

The Opportunities and Threats sections are external - this can be current consumer perception of your brand, the state of the economy, by-laws that can affect the event, what the competition is doing, and what the state of the current market is. Below is a sample SWOT:

Strengths	Weaknesses
<ul style="list-style-type: none"><li>☛ Strong Financial Position</li><li>☛ Good Reputation</li></ul>	<ul style="list-style-type: none"><li>☛ Physical Location of Company cannot hold events</li></ul>
Opportunities	Threats
<ul style="list-style-type: none"><li>☛ Untapped Markets</li><li>☛ 'New Local Trend'</li></ul>	<ul style="list-style-type: none"><li>☛ Multiple Competitors working toward similar goals through similar events</li></ul>

Once a SWOT analysis is completed, use the notes section to pair STRENGTHS to an OPPORTUNITY or THREAT, and WEAKNESSES to an OPPORTUNITY or THREAT. One of these will shape your event marketing strategy.

## Strengths

- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_

## Weaknesses

- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_

## Opportunities

- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_

## Threats

- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_
- ☛ \_\_\_\_\_

Notes:

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# Creating Your Action Plan

Create a checklist detailing the jobs that need to be done, develop a budget, build both logistics and execution plans, and a post-event wrap up plan.

## Pre-event Planning

Tactic	Timing	Date	Assigned To	Cost
Determine purpose and objective of event	12-16 wks prior			
Develop “wish list” of speakers / presentations	12-16 wks prior			
Envision program (include catering, i.e. lunch/dinner, etc.)	12-16 wks prior			
Determine target audience	12-16 wks prior			
Determine budget	12-16 wks prior			
Determine desired number of audience members	12-16 wks prior			
Determine date and contact and confirm speakers	12-16 wks prior			
Determine roles for members of planning committee	12-16 wks prior			

# Logistics

Tactic	Timing	Date	Assigned To	Cost
Book required facilities	12-16 wks prior			
Develop invitation list	12-16 wks prior			
Design invitation	12 wks prior			
Print invitations	10-12 wks prior			
Ensure availability of volunteers as needed	10 wks prior			
Book additional technology as required (e.g. AV equipment)	10 wks prior			
Confirm speaker(s)	10 wks prior			
Set-up online registration site	8 wks prior			
Mail out invitations	4-5 wks prior			
Track RSVPs	Ongoing			
Book required furnishings (stage, podium, seating, reception table, table skirts, coat racks, etc.)	4 wks prior			
Book catering	4 wks prior			
Book photographer	4 wks prior			
Organize display materials	4 wks prior			
Book music	4 wks prior			
Gifts for speakers/presenters	4 wks prior			
Documentation of event	4 wks prior			
Parking arrangements for guests	4 wks prior			
Detailed event scenario	4 wks prior			
Speaking notes for presenters	4 wks prior			
Order flowers	3 wks prior			
Test AV equipment	2-3 wks prior			
Assign roles for day of event	2-3 wks prior			
Confirm catering numbers	1-2 wks prior			

## Communications

Tactic	Timing	Date	Assigned To	Cost
Update website re: logos and related stories (if relevant)	8-12 wks prior			
Posters and other signage	8-12 wks prior			
Develop event program or other handouts	8-12 wks prior			
Hang signage at site	2 days prior (if possible)			

## Sponsorship

Tactic	Timing	Date	Assigned To	Cost
Solicit prospects and update sponsorship document, forward letters of intent, process payments and update website as funds are received	16-4 wks prior			
Confirm final logo placement on all print, clothing or digital items	4 wks prior			
Review all final contract or letters of intent to ensure deliverables are/will be met	4 wks prior			
Ensure that all sponsorship funds have been received and receipts / thank you letters have been processed	2 wks prior			
Sponsorship follow-up calls to confirm event details / secure VIP guests / provide name and contact information of liaison	3 days following			

## *Day of the Event*

Tactic	Timing	Assigned To
Last minute RSVPs	A.M.	
Reminder phone calls	A.M.	
Set-up	3 hrs prior	
Sound check	1 hr prior	
Determine photo locations and opportunities	30 min prior	

## *Roles for Day of the Event*

Role	Assigned To
Technician liaison	
Entertainment liaison	
Photography liaison	
Catering liaison	
Media liaison	
Registration	
VIP liaison	
Sponsorship liaison	
Crowd control	

## *Post-Event*

Tactic	Timing	Date	Assigned To	Cost
Debriefing, evaluation, questionnaire	1-5 days after			
Thank you cards	1-5 days after			
Actualize budget	1-5 days after			
Post-event with sponsors - confirm deliverables were met and discuss renewal if appropriate	1-2 wks after			

## Sample Event Budget

Venue	Estimated	Actual
Room/hall rental	\$350	\$200
Staff		
Tables and chairs	\$150	\$100
Equipment	\$100	
Port-a-johns		
<b>Total</b>	<b>\$600</b>	<b>\$300</b>

Program	Estimated	Actual
Performers	\$350	\$300
Speakers		
Travel		
Hotel		
Other		
<b>Total</b>	<b>\$350</b>	<b>\$300</b>

Decorations	Estimated	Actual
Linens	\$500	\$450
Flowers	\$250	\$250
Lighting		
Balloons		
Paper supplies		
<b>Total</b>	<b>\$750</b>	<b>\$700</b>

Prizes	Estimated	Actual
Door/raffle prizes	\$500	\$425
Gifts		
<b>Total</b>	<b>\$500</b>	<b>\$425</b>

Total Expenses	Estimated	Actual
	\$5,210	\$5,010

Advertising	Estimated	Actual
Design	\$500	\$500
Photocopying/Printing	\$100	\$75
Postage	\$50	\$50
<b>Total</b>	<b>\$650</b>	<b>\$625</b>

Miscellaneous	Estimated	Actual
Transportation		
Licensing	\$50	\$50
Raffle tickets	\$10	\$10
<b>Total</b>	<b>\$60</b>	<b>\$60</b>

Refreshments	Estimated	Actual
Food	\$1,200	\$1,350
Drinks	\$1,100	\$1,250
<b>Total</b>	<b>\$2,300</b>	<b>\$2,600</b>



# Blank Event Budget

Venue	Estimated	Actual
Total		

Decorations	Estimated	Actual
Total		

Advertising	Estimated	Actual
Total		

Miscellaneous	Estimated	Actual
Total		

Refreshments	Estimated	Actual
Total		

Program	Estimated	Actual
Total		

Prizes	Estimated	Actual
Total		

Gifts	Estimated	Actual
Total		

Total Expenses	Estimated	Actual



# *Post Event*

## *Recognition*

**Who should be recognized?** *(VIP's, Sponsors, Volunteers, Committee members, et cetera)*

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**How should they be recognized?** *(Formal vs. informal)*

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**Who does the recognition?** *(Head of sponsorship, Committee chair, et cetera)*

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**Is the recognition included in your budget?**

- Yes       No

**When should you do the recognition?**

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# Evaluation

## Feedback Methods:

- Volunteer survey
- Participant survey
- Other: \_\_\_\_\_

## Fiscal

Number of participants:

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Sponsor revenue:

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Income:

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Expenses:

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Balance budget:  Complete

## Other

Number of guests:

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Number of volunteers:

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Media coverage:

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## *Committee Debrief*

- ☛ Should be done as soon as possible after the event
- ☛ Should be constructive criticism
- ☛ As the event organizer, stay calm and don't take it personally
- ☛ Encourage input from all members
- ☛ Keep notes and action items
- ☛ Follow-up on recommendations

## *Wrap-up Report*

Items to include:

- Background
- Committee list
- Results
  - Sponsorship(s)
  - Numbers of participants, guests, volunteers
  - Revenue sources
- Recommendations
- Closing remarks
- Attachments
  - SWOT analysis
  - Financial reports
  - Templates





# *Special Event*

## *Proposal Form*

Please complete, sign, and return this form to:

Windsor Cancer Centre Foundation  
2220 Kildare Rd., Windsor, ON N8W 2X3  
519-254-5577 Ext. 58506#/58634# info@windsorcancerfoundation.org

### *Contact Information*

Chair/Coordinator: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

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

*On an additional page, please provide the above information for all of your committee members.*

How did you hear about fundraising for WCCF?

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Please provide your reason(s) for coordinating this fundraising event:

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## *Event Details*

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

Proposed Date and Time of Event (Start & End Time):

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*\*The Foundation strongly advises the Event Chair to consult local community calendars for conflicts with your proposed date. (E.g. City of Windsor, Tourism Windsor Essex)*

**Location of Event:** *(Include contact information, address, and phone number)*

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**Description of Event:**

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## Capacity of Event:

**Will your event include any of the following (check all that apply):**

- Raffle    50/50 Draw    Auction(s)    Giveaways    Alcohol\*

*Please be advised that liability insurance coverage up to \$2 million is required for all events which use the name and/or logo of the Foundation. The Foundation will provide this at no additional cost. Please allow two weeks to process.*

**Do you anticipate this becoming an annual event?**

- Yes                       No

**Do you require volunteers from the Foundation to assist with the event?**

*\*Deadline to request volunteers is at least 2 weeks prior to event.*

- Yes                       No

If yes, how many? \_\_\_\_\_ Hours required per volunteer: \_\_\_\_\_

**Do you require a Foundation representative to**

- attend and/or    speak at your event?

*\*Please allow at least two weeks to schedule this request.*

## Financial Details:

*Donor name and mailing address must accompany all cash donations.*

**Will the Foundation be required to issue official tax receipts?**

*(Issued for donations of \$20 or more)*

- Yes                       No

*If yes, all cheques must be made payable to the "Windsor Cancer Centre Foundation". If a cheque(s) are made payable to the event or event coordinator(s), a photocopy of each cheque must be provided to the Foundation for official tax receipting purposes. Please see the Taxation Guide for details about what qualifies for an official tax receipt. The Foundation can only receipt for monies received.*



**Please select where you wish to direct the event proceeds:**

- Where Most Needed
- Radiation
- Seeds4Hope
- Men’s Health
- Systemic (Chemo)
- Patient Assistance Fund
- Women’s Health

**Ticket price to attend event: \$\_\_\_\_\_**

*\*If your event will be collecting pledges on behalf of registered participants, please advise as the Foundation can set-up a customized event page with a Friends Asking Friends component.*

## *Event Promotion*

**How do you plan on promoting the event?** (E.g. posters, flyers, brochures, radio, television, community calendars, etc.) **The Foundation would be pleased to provide guidance with this.**

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## *Foundation Support of Event*

The Foundation will provide the following to approved event partners, as requested or needed:

- ☛ Letter of endorsement
- ☛ WCCF Marketing Materials – including logo, brochure, newsletter, banner
- ☛ **Media support** (I.e. the Foundation will assist with sending out media advisories, press releases, etc. to local media contacts)
- ☛ **Official tax receipt policy**  
\*Please ensure full and complete use of our name: Windsor Cancer Centre Foundation
- ☛ **Tickets/Donations** - WCCF can provide donation and ticket sales by credit card through the website, please advise if this service is required

## Event Wrap-up

The Foundation requires the following information upon the completion of the event:

- ☛ Photocopies of any cheques not made out to WCCF that require tax receipts
- ☛ List of guests/participants, sponsors, donors, prize sponsors

The Foundation encourages event partners to come to the Cancer Centre for a cheque presentation as well as a tour of the Centre in order to thank the event coordinator and committee members personally as well as identify areas where donors have made a difference in the lives of those living with cancer in our community.

By signing this form, you agree to allow the Foundation to release your name and event information to the media, and authorize the Foundation to post your event information on our website, Facebook page, and any other promotion we deem appropriate.

### Signatures of Event Chair and/or Committee Member

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Event Approval by Foundation:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# *Tax Receipting Guide*

## *For Events*

### *Introduction*

Thank you for your interest in hosting a fundraising event for the Windsor Cancer Centre Foundation (WCCF). We are very fortunate to have the support and commitment of our community partners who give of their personal time and contacts to help local cancer patients. The proceeds from your event will benefit a number of areas, including investments in technology and equipment, cancer education and prevention, locally-based research, and patient support. All of these areas serve to enhance the care and treatment for cancer patients in our community.

With your help we can achieve our mission: To reduce the impact of cancer in our community.

The WCCF is committed to following all rules and regulations regarding tax receipts set out by the Canada Revenue Agency (CRA). This is vital to protecting our charitable status. If tax receipts for your participants are a major consideration in the likely success of your event, then please review the tax receipting guidelines before you make any final decisions regarding your event.

#### **Does my event need tax receipts?**

Please ensure that you have discussed your fundraising idea in detail with the WCCF staff and that you are clear about what you can and cannot offer regarding tax receipts. It is your responsibility to communicate decisions surrounding tax receipts to the participants of your event.

#### **Is receiving a tax receipt important to the people participating in my event?**

**If the answer is NO**, you will be saving yourself and the Foundation many hours of work by deciding not to offer tax receipts. The Foundation would be pleased to provide a thank you letter confirming any gift, instead of a tax receipt.

**If the answer is YES**, then be sure to review the following information about tax receipts and talk to the WCCF staff to confirm your plan.

## The Foundation can provide tax receipts only if:

1. The tax receipt is being issued to the person who made the donation **OR** where the person issuing the cumulative cheque to the Foundation has acted as a donation collector, a completed Tax Receipt Log (*see number 3*) has been provided along with that cheque.
2. The eligible amount of the donation is \$20.00 or greater.
3. You provide a complete and legible list of donors on the Tax Receipt Log. Tax receipts will not be issued until the Tax Receipt Log has been submitted.
4. The following information needs to be included:
  - ☛ First and last name
  - ☛ Complete address, including city and postal code
  - ☛ Telephone number
  - ☛ Amount given
  - ☛ Donor signature
  - ☛ List and value of any benefits received for donation  
(provide the Fair Market Value of the benefits NOT the cost)
  - ☛ Tax receipt amount to be issued  
(amount paid, less fair market value of benefits received)
5. You must discuss your event with your staff liaison and complete an Event Financial Summary **BEFORE** you can make any commitments to your donors/suppliers for tax receipts.
6. The donations and a completed Event Financial Summary and Tax Receipt Log are received by the Foundation within 60 days **AFTER** your event.
7. The rules and regulations additionally outlined for your specific type of event are followed.

*Please Note:*

*It is often more financially beneficial for sponsors or other corporate contributors to receive a letter of acknowledgment as proof of payment, as business expenses have a greater tax advantage for a business than a charitable donation.*

## *Types of Giving*

Individuals can give in the following ways:

1. Donations:

If a “cash” donation is given directly to the Foundation, then a charitable receipt can be provided to the person who made the donation. The donation must be \$20.00 or greater to receive a tax receipt.

The full name and address (including postal code) must be submitted.

2. Auction Purchases:

When an auction item is purchased the buyer is receiving something (i.e. the purchased item, as well as the opportunity to participate in the auction) for their money, therefore a tax receipt will not be issued.

3. Purchase of a ticket or entrance fee to an event

The person is receiving something in return for the purchase of their ticket, therefore only a partial tax receipt can be issued based on the fair market value of the event. The difference between the ticket price and the benefit should be a minimum of 20% of the ticket price or \$20 - whichever is higher.

## *Coordinator of a Fundraiser*

It is the CRA's view that where a Coordinator of a Fundraiser collects funds from the general public and pays the amount to a registered charity, the Coordinator is not entitled or eligible to receive a charitable donation receipt. The Coordinator of a Fundraiser appears to be acting as an “Agent” for the persons (donors) from whom the funds are collected. The property transferred to the charity is the property of the persons from whom the gifts were collected on the understanding it would be given to a charity. Those persons are entitled to a charitable receipt within the guidelines of charitable tax receipting rules applicable to events.

## What is the eligible amount for tax receipts?

The amount that may be receipted is the ticket cost/entry fee minus the aggregate fair market value benefit amount. Please note that in all cases, a receipt cannot be issued if the aggregate benefit amount exceeds 80% of the price paid.

Benefits may include but not limited to:

- ☛ Any products or services received by the donor
- ☛ Entertainment
- ☛ Alcohol
- ☛ Food and drinks (*cost that would be charged if it were to be purchased separately*)
- ☛ Any other benefit to the participant.

## What is fair market value?

Fair market value is the highest price, expressed in a dollar amount that the property (item) would bring, in an open and unrestricted market, between a willing buyer and a willing seller who are Knowledgeable, informed, and prudent and who are acting independently of each other. Fair market value does not include taxes, commission, etc. If the fair market value cannot be established, a tax receipt cannot be issued.

Even if a sponsor has paid to cover costs, or has donated or discounted the price of the entertainment, food, etc., the same rule applies and only the price beyond the fair market value would apply for a tax receipt.

For more details regarding fair market value and determining benefits, please review the CRA summary policy at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca)

## *The Event Financial Summary Form*

This Event Financial Summary Form (see next page) must be submitted and approved prior to tax receipts being issued.

Please complete the list of all benefits with fair market value to the participants. Please attach support for fair market values listed in order to facilitate approval for tax receipts to be issued.

# The Event Financial Summary Form

<b>Name of Event</b>		
<b>Name of WCCF staff liaison</b>		
Are you planning on conducting an auction at your event? (Y/N)		
A - Per person entry fee(s)		\$ /person
<i>If multiple ticket prices apply, please complete a form for each ticket price.</i>		
B - Number of participants		participants
Provide the expected number of participants		
C - Expected revenue through participation/ticket sales		
<i>Multiply section A x B</i>		
D - Expected revenue through sponsorship		
<i>Provide the total of confirmed sponsorship to-date</i>		
E - Expected revenue through additional fund raising		
<i>Enter total here and attached a list of expected revenue through day of fund raising such as silent auction, collection boxes, etc.</i>		
<b>Total expected revenue (C + D + E)</b>		

Benefits	Fair market value for all participants	Fair market value total divided by section B
Venue rental or green fees <i>Enter fair market value of venue or green fees</i>	\$	\$ /person
Cart rentals (if applicable) <i>Enter fair market value of rental or green fees</i>	\$	\$ /person
Food and beverage <i>Enter the total food and beverage the participants will receive. If food and beverage is discounted, please list the cost if the food and beverage was purchased external of event.</i>		\$ /person
Entertainment <i>Enter the cost of entertainment if purchased external of event.</i>		\$ /person
Value of gift bag items <i>Enter total here and attach list and value of all items in the gift bag. This should include any items donated.</i>		\$ /person



<b>Value of any complimentary items provided to all participants</b> <i>List the total value of the complimentary items or door prizes given.</i> <i>The value of the door prizes and the complimentary item(s) received by the donor will not be viewed as a benefit if it does not exceed the lesser of 10% of the ticket price and \$75. For example, if a \$3,500 trip will be given away as a door prize with 500 guests, list \$3,500 in the first column and \$7 in the second column.</i>		\$ /person
<b>Other benefits received by participant(s) (specify)</b>		\$ /person
<b>F - Total benefit</b> <i>Total all benefits listed above</i>		\$ /person
<b>Eligible tax receipt amount per entry fee - (A - F)</b> <i>Must exceed 20% of entry fee.</i>		Tax receipt \$ /person
<b>Name of event organizer:</b>		
<b>Approved</b> <i>All completed forms will be review and if approved, signed by WCCF</i>		

## Gifts in-kind for events

Generally, gifts-in-kind to be used at events are donated by companies and usually represent a gift from inventory. Income tax receipts will not be issued for these gifts, as it is understood that the business would not benefit by receiving an income tax receipt, as they would also be required to claim the fair market value in its revenues. The WCCF will gladly provide the company with a thank you letter acknowledging the gift.

If an individual donates an item, the item needs to be of value and the fair market value must be established for the item at the time of donation. This can be done by:

- ☛ Getting a purchase invoice or other proof of purchase
- ☛ Having an independent third party appraise and value the item at the donor's cost
- ☛ Obtaining a current price list for the item from a recognized commercial enterprise operating independently of the donor.

If the item was purchased within the last 3 years, then the fair market value is considered to be the lesser of the purchase price and the amount revealed in the appraisal.

*Tax receipts will not be issued for gifts-in-kind below \$100. A tax receipt cannot be issued for personal services, for example legal, entertainment, transportation, or dining services. Approval must be obtained in advance.*

## *Donations of artwork for events*

The following documents are required to issue tax receipts for donations of artwork:

- ☛ Appraisal at donor's expense.
- ☛ The appraisal must be signed by a certified appraiser.
- ☛ One page boiler plate appraisals, e-mailed appraisals, scribbled appraisals, or appraisals written in pencil are not valid.
- ☛ A list of credentials for the appraiser
- ☛ A history of the artist
- ☛ A description, picture and history of the piece of artwork including significant points of reference
- ☛ The methodology used to value the artwork
- ☛ Reference to recent market purchases used to substantiate market value
- ☛ Proof of the date of acquisition of the artwork and a statement that the artwork was not purchased for the purposes of donation.

The WCCF cannot issue official income tax receipts in the following situations:

- ☛ Contributions of services (not considered as property)
- ☛ Gift certificates where the donor was the issuer or the certificate was not purchased outright and then donated.
- ☛ Use of vacation property
- ☛ Corporate contributions

## *Corporations can give in the following ways:*

### 1. Donations:

If the contributor is a corporation, 100 percent of the contribution may be deductible as a business promotional expense. The practice of the Foundation is to issue a letter confirming the value and date of the donation upon payment.

If the corporation receives no benefits (i.e. advertising in a brochure, logo recognition, tickets, etc.) and all other requirements are met, a tax receipt may be issued at the request of the corporation.

### 2. Sponsorships:

By virtue of being a sponsor, the corporation is receiving benefits in the form of recognition and advertising. A business confirmation letter will be issued which will support their contribution as a business expense.

### 3. Business donating inventory:

The Foundation can provide the donor with a gift-in-kind letter stating the value of the gift. We require backup to validate the value of the item(s).

### 4. Gift-in-kind donations:

Businesses can deduct the original cost of the inventory as a business expense and not lose the tax benefit associated with the transfer of property. The Foundation will issue a gift-in-kind letter that can be used to verify the write off of the inventory.

### 5. Donation of Services:

Tax receipts cannot be issued for services provided including: personal, professional, or legal services.

For any additional questions regarding tax receipts for events, please ask your WCCF staff liaison.







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