

Grandmothers Fundraising Kit

THANK YOU SO MUCH for joining the Stephen Lewis Foundation's Grandmothers to Grandmothers Campaign. As you know, one of the main purposes of the Campaign is to raise funds to support grandmothers in Africa. Whether you are planning a big event, a small event, or doing ongoing fundraising, we hope this Fundraising Kit will be helpful.

Inside the Grandmothers Fundraising Kit, you'll find:

- **Ten Tips for Getting Started.** Here's some great fundraising advice from grandmothers on how to organize events and raise money. (Page 2)
- **Promotional Materials.** Get acquainted with the resources available to help you promote your group's activities, including Stephen Lewis Foundation logos and photos. (Page 3)
- **Tax Receipt Information.** Learn more about what types of donations can or cannot be issued a tax receipt. (Page 4)
- **Charitable Tax Receipt and Event FAQs.** Find answers to common questions about tax receipts and events. (Pages 5-6)
- **Grandmothers Event Registration Form.** Please fill out and send us this one-page form in advance of your event or fundraising activity. You can send it via email, fax or mail. It helps us keep track of events, materials and funds. (Page 7)
- **Submitting Your Funds: A Form for Treasurers.** Please have your treasurer fill out and include this form every time you send us funds. It helps us keep track of your group's totals. We've provided some tips to help on the following pages. (Pages 8-10)

If you have any questions please contact us at:

416-533-9292 or 1-888-203-9990, ext. 230, or campaign@stephenlewisfoundation.org

Please note that this entire kit and all forms are available on our website at:

www.stephenlewisfoundation.org/grandmothers-resources

10 Tips from Grandmothers to Help You Get Started With Fundraising

1. Start Small

Focus your first efforts on smaller fundraisers and pick something you already know how to do. Teas, small dinners, yard and garage sales, plant and book sales, film nights, etc., are a good way to begin. They are not very complicated but some, like yard sales, can be labour-intensive.

2. A Core Group to Organize

No matter how big your group, you will need a smaller committee of 4 to 12 people to organize your event. Make sure everyone in the core group has a role to play so that you develop as a team. This builds capacity for future fundraisers. Involve others when you need them – for expertise or specific tasks.

3. Give the Event a Vision

Early on, the core group needs to develop a common vision of the event – what it will look like, feel like, what people will do, why they will want to come to it, how they will experience it. This provides the core group with a shared understanding and builds excitement and commitment to the African grandmothers.

4. Pick a Leader and Develop a Plan

No matter how simple the event, someone needs to take the lead and make sure the event happens as planned. It doesn't have

to be the chair but should be someone from the group who has a strong commitment to the project. Put together a plan that everyone agrees to – *who does what by when*. Check off finished tasks.

5. Fill out the SLF Fundraising Forms

Read the information about fundraising and publicity and make sure you are clear about what is expected. Send in the Grandmothers Event Registration Form in advance.

6. Communicate, Communicate, Communicate

Review the event plan regularly with the core group. Meet, phone and email as needed to keep everyone in the loop about your progress and any changes to the plan.

7. Keep Track of the Money

Develop a budget and set up a system to track the money from tickets and other sales separately from donations to SLF. Make sure you know what can receive a tax receipt and what can't.

8. Have Fun

Fundraising is hard work, but remember to have fun along the way – otherwise you're missing the joy of working with others for a good cause!

9. After the Event

Fill out the Submitting Your Funds treasurers' form and send money to SLF. With your group members, review what went well and what you would do differently for future events.

10. Celebrate Your Success

Honour the hard work that you've done by celebrating your success. Every dollar raised is a blow to the pandemic. Don't forget to honour your triumph!

Promotional Materials

The Stephen Lewis Foundation has developed a number of materials to help you promote your activities. Please contact us and tell us what you are planning, and we can send you materials, and provide you with access to logos and photos for your posters and presentations. We always love to hear from you and want to be as helpful as we can. Here is a sample of what we have available:

Logos

Please be sure to only use logos from the SLF website. They have been designed and formatted for print (posters, tickets, etc.) and websites. In addition, all the event logos make it clear that the funds raised at your event are donated to the Stephen Lewis Foundation. The following are examples of logos available for your use and can be found on our website at www.stephenlewisfoundation.org/logogallery. You will need to contact us first, to receive the password, which is for one-time use only.



Photos

We have an online photo gallery available for your posters, events and presentations: www.stephenlewisfoundation.org/photogallery. Please note that the photos are intended solely for the use of grandmother groups and event organisers and may not be used commercially. Second, each photo must have the photographer's credit attached. And finally, you will need to contact us first to receive the password.

Print and Video Materials

We have donation envelopes, postcards, flyers, newsletters, DVD messages from Stephen, and video clips from African projects. We are happy to send you what you need for your event, sale, or presentation. Just contact us sufficiently in advance so that we can mail out the materials in time.

Reviewing Your Promotional Materials

Please send us your promotional materials in advance of your event so that we can review them. We do that quickly and try to make constructive suggestions on language and layout. We are usually able to send our comments back to you in a timely manner.



Tax Receipt Information

Here are a few common situations that involve tax receipts. We hope this will help you plan and promote your event. It's not a comprehensive list, so please check our website, read the Tax Receipt FAQs in this kit, or call/email us if you have any questions. **We are always happy to hear from you and answer your questions directly!**

Note that the Stephen Lewis Foundation is a registered Canadian charity and must comply with all rules and regulations of the Canada Revenue Agency. The Stephen Lewis Foundation's Charitable Registration Number is 89635 4008 RR0001.

What Can Be Receipted?

- **Individual donations of \$20 or more.** We will issue receipts for cash accompanied by a Donor Card, a cheque (with contact information) made out to the Stephen Lewis Foundation, or an online donation. This cannot be money spent on a service or product.
- **Proceeds from a seller.** Artists or bakers or jewellers, who are selling their work, may send in the proceeds from the sale and will receive a tax receipt. The buyer of the craft or art cannot receive a tax receipt.

What Cannot Be Receipted?

- **Donations on behalf of someone else.** The Foundation cannot issue a tax receipt to someone when the donation has been made by someone else. For example, you cannot make a donation (on behalf of someone's birthday) and ask that the birthday honoree get a tax receipt. Only a donor can get a tax receipt.
- **Fixed ticket sales.** The Foundation cannot issue a tax receipt to a donor who has paid for a ticket to get into the event (such as a concert or dinner), even if 100% of the ticket price is donated to the Foundation. Any additional donation, which is freely given, may receive a tax receipt.
- **Purchase of products or services.** The Foundation cannot issue a tax receipt to a donor who buys a product or service. For example, someone who has bought a handmade tote bag, or won a silent auction bid on a weekend spa. In these kinds of cases, the donor is not eligible for an official tax receipt, even if all the proceeds from the sale or auction are being donated to the Foundation.

Do you have questions or want more details?

Check out the Charitable Event and Tax Receipt FAQ in this kit, or contact us any time at 416-533-9292, ext. 230, or 1-888-203-9990, ext. 230, or campaign@stephenlewisfoundation.org.

Charitable Tax Receipt & Event FAQs

This is an area of some complexity but we'll try to answer your most common questions as simply as possible. If you have any questions, please contact us in advance of your event or check out the FAQ section on our website at www.stephenlewisfoundation.org/faqs.

Q. I am organizing an event. Would it make things simpler for the Foundation if I bought a receipt book and made out receipts on the spot?

A. Under the *Income Tax Act* only the Stephen Lewis Foundation is authorized to provide tax receipts to donors.

Q. People at my event will likely want to donate cash but I don't want to send cash through the mail. How can I get you the money, and donors their tax receipts?

- A. There are several parts to your question, so bear with us:
1. Provide donor forms and envelopes for all your potential donors. That way, they can fill out their own contact information and insert the form with their cash/cheque/credit card number into the envelope. People who donate a small amount, want to donate anonymously, or don't care about a tax receipt, don't have to fill in the donor form.
 2. Collect all the cash and turn it into a money order, or if your group has a bank account, deposit it into your group's account and write us a cheque. That solves the problem of sending cash through the mail.
 3. Along with the cheque, be sure to send us the donor forms of those who made a cash donation of \$20 or more. These forms *must* include all the contact information for those donors, including the amount they donated. We need their name, full address, phone number and, if possible, their e-mail address.
 4. The Stephen Lewis Foundation will issue tax receipts to your donors directly, within 6-8 weeks.

Q. Do you issue tax receipts for all or part of a ticket price?

A. The Stephen Lewis Foundation cannot issue official donation receipts for the cost of a ticket, the partial cost of a ticket, or a suggested minimum donation to an event. According to the *Income Tax Act*, these contributions are not freely given (since they are required in order to attend the event) and are therefore not eligible for official donation receipts.

(Continued on next page)



Q. People are providing catering, audio equipment, the room rental for free, etc. They've asked me for tax receipts for their free services.

A. The *Income Tax Act* does not permit the Foundation to issue tax receipts for services rendered.

Q. We have received many donations for our silent auction from local businesses and artists. Can the Foundation issue tax receipts to those donors? How about the people who buy the auction items?

A. The Stephen Lewis Foundation does not issue official donation receipts for donated items. The Canada Revenue Agency requirements are too onerous. Event organizers have told us that, in their experience, many businesses are happy to deduct the donation as a business expense, without requiring an official donation receipt. They were delighted to know that their contribution would go to a worthy cause.

Q. What about the people who buy the auction items?

Guests who buy auction items are receiving something for their donation and the *Income Tax Act* does not permit the Foundation to issue tax receipts in these circumstances.

Q. I am organizing a lottery/raffle/draw (at my school, church, etc.) to raise funds for SLF. Can people who buy tickets receive tax receipts?

A. You *cannot* organize a lottery or raffle or draw. The *Criminal Code of Canada* prohibits the act of 'selling a ticket with a chance to win a prize' unless a gaming licence has been acquired. In order to acquire a gaming licence, you have to be a charitable or religious organization which uses the funds raised for local organizations. Your grandmother group is not a charitable organization and the money raised is going to Africa. Therefore none of the required conditions can be met. Please note that the *Criminal Code* does not apply to 'door prizes' because door prize tickets are given away for free for attending an event. However, if you have items that you want to use for fundraising, you can always hold a silent or live auction.

Q. The venue where we want to hold our event requires that we have liability insurance. Can the Foundation provide insurance for us?

A. No. Third-party fundraisers, including grandmother groups, are responsible for purchasing their own insurance. We suggest contacting a number of different insurance companies to compare quotes or ask the venue if they can make a recommendation.

Grandmothers Event Registration Form

Fundraising Information	Group Contact Information
Event Name:	Group Name: Group ID#:
Event Date & Time:	Mailing Address: City/Town: Prov./Terr.: Postal Code:
Event Contact Person:	Email (event contact):
Signature (if possible): x _____	Phone (event contact):

What type of event are you organizing? *(Please check all that apply)*

- Dinner/Brunch/Luncheon/Tea Speaking Event Scrabble
 Pledge Event (e.g., Stride walk) Concert/Film Screening Dare/Dare to Dine
 Sale: _____ Other: _____

How will you be raising funds? *(Please check all that apply)*

- Ticket Sales Sales Donations/Collection
 Pledges Auction Other: _____

Would you like SLF to post your event on our website? No Yes

Do you require materials from SLF? No Yes

Will you be creating your own promotional materials? No Yes *(Please send for review)*

Event Description

This form is also available online at www.stephenlewisfoundation.org/grandmothers-resources



Tips for Collecting and Submitting Your Funds

Before filling out the form, ask yourself, "How did we raise the money?" This will help you (and us) figure out who gets tax receipts. If you hold a ticketed event (e.g., a dinner or a

concert), here is an example of the types of donations you might get and how to fill out the form. For more information about tax receipts, please see the FAQs section on page 9.

Event Example: Concert

- All of the money from the ticket sales and silent auction sales is non-receiptable.
- Each cash donation must have a donor form included so that we know the name, address, phone number, e-mail (if possible) and amount donated for a tax receipt (\$20 or more). See the following page for a sample donor form. Donor forms are also available online at www.stephenlewisfoundation.org/grandmothers-resources.
- Each cheque must have contact information in order for us to issue a tax receipt. We are only able to issue tax receipts for contributions of \$20 or more.

Sample Form

Source of Funds	Description	Amount	Tax Receipts?
Ticket Sales	Money from tickets sold	\$325	No
Cash donations	Three donor forms included (the rest is anonymous or less than \$20)	\$100	Yes (3)
Cheques	Eight cheques included	\$200	Yes (8)
Silent Auction	100% of funds from the auction	\$310	No
Ongoing Craft Sales	Knitted dolls sold from July–September	\$250	No
	Total amount enclosed:	\$1185	

Are you Holding a Pledge Event?

What do we mean by a pledge event? A walk-a-thon, a bike-a-thon, a Scrabble game – namely, any event where individuals or teams are sponsored by donors.

- The easiest way to raise money, keep track of donors, and issue tax receipts is to set up a personal online fundraising page at www.stephenlewisfoundation.org/fundraisingpage and invite supporters to donate online. They'll get a tax receipt immediately via email. Not sure how to do this? Give us a call and we can walk you through the process.

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- If you are raising funds in person, use a pledge form that clearly asks for printed or typed names, contact info and amount donated. Call us and we'll send you an easy-to-use form!
- If you're using pledge forms and more than 40 people are donating to your pledge event, please track the information in an Excel spreadsheet to ensure accurate and timely data entry for tax receipts. Contact us and we'll email you a spreadsheet.

The Donation Form

This is a great tool to collect and track cash donations. There are two easy ways to get it:

- Contact us for donation forms (with attached envelopes) and we'll send them by mail as quickly as possible. Let us know how many you'll need.
- Download and print donation forms from our website. They fit three to a page, and can be found at www.stephenlewisfoundation.org/grandmothers-resources.

Sample Donation Form

Donation Form

Group Name: _____ **Event:** _____

Name: _____ Email: _____
First Last

Street Address: _____ Apt./Unit: _____

City: _____ Prov./Terr.: _____ Postal Code: _____ Phone: (_____) _____ - _____

I would like to receive updates from the Foundation by: email lettermail no updates, thank you

You may release my contact details to the event organizer.

Amount: \$ _____ **Cash** **Cheque** **Credit Card:** VISA MasterCard AMEX

One-time donation Monthly donation

Cardholder name: _____

Credit card #: _____ Expiry: ____ / ____
MM YY

Signature: _____



www.stephenlewisfoundation.org

Make cheques payable to:

Stephen Lewis Foundation
 260 Spadina Ave., Suite 501
 Toronto, ON M5T 2E4

Thank you for your support!

Charitable Registration # 89635 4008 RR0001