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Fundraising Tool Kit



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Team work makes the dream work!

There could not be a truer statement when it comes to achieving the dream of the Sandra Schmirler Foundation: that all babies born too soon, too small or too sick be cared for in a NICU equipped with state-of-the-art life-saving equipment close to their homes, families and friends. With every individual who hosts their own fundraising event in support of our dream, we are one step closer to it becoming a reality. Thank you for joining our team of fundraisers!

Our fundraising toolkit will help you plan your event and provide helpful tips to make your event a success.



“Thank you for fundraising on behalf of the Sandra Schmirler Foundation. Your fundraising event today, will help millions of babies grow up to be champions, just like Sandra.” – Bernadette McIntyre, Chair, The Sandra Schmirler Foundation



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Create Your Event

There are many different types of events that can have a fundraising component. Consider your strengths and decide what you would enjoy organizing.

Some event ideas (I am sure you will have many more!!) are:

Yard/Garage Sale	Concert	Bonspiel
Eating Contest	Scavenger Hunt	Pancake Breakfast
Golf Tournament	Draw to the Button	Jean/Casual Day
Movie Night	Scavenger Hunt	Fantasy Sports
5/10km walk/run	"-a-thon" walk, read, bowl, dance	Board/Card Game Tournament
Murder Mystery Dinner	Scotties Pool or Brier Pool	Fitness Challenge
BINGO	Chilli or Rib Cookoff	Hog line violation fee
Crowd Sweep	Home Party (i.e. Pampered Chef)	Tasting Party (i.e. Wine, Specialty Drinks)

Find Your Team

Consider the various tasks your event will require to operate and reach your goal. If the workload will be too much for one person, find friends and family members or volunteers from your community to form an event committee. Tap into their strengths and assign tasks. Provide your volunteers with an overview of their role and responsibilities and training, if required. Don't forget the Sandra Schmirler Foundation, reach out to us and see what we can do to make your event a success. We are here to help you!

Map out the Details

Pick a venue and a date for your event. When deciding on a venue consider the size, parking, washrooms and convenience for your attendees. If possible, check community events listings/Facebook groups to see if there are other events planned on the date you are considering. The weather can also impact an event so, if needed, have a rain date or indoor location in your plan.

Build an action plan to map out the tasks that will need to be completed to bring your event to fruition. Assign tasks to your committee members with deadlines. There is a sample action plan in **Appendix A** that you can customize for your event.

Create a budget by identifying all sources of revenue and expenses for your event. Revenue sources could be raffle proceeds, entrance fees and silent auctions. Expenses for your event could include decorations, printing, promotion and prizes. Approach local businesses for sponsorships to help cover the cost of these types of expenses. **Appendix B** is a guide to create a sponsorship package that can be used when approaching businesses to sponsor your event.

Register Your Event

Complete our "Event Registration" form located at the end of this document. Our Foundation will review your event and reach out to discuss ways in which we can support your event including supplying logos, promotion and possibly having a representative attend.

Fundraising

Non-donation revenue: This is revenue collected from registration fees, raffles or silent auctions, etc. This revenue is used to cover the expenses of your event and any extra becomes part of the net proceeds of your event.

Receipted revenue: You can collect cash or cheque donations to the Foundation in person before, at or after your event. Please have all cheques made out to “Sandra Schmirler Foundation”. Accurately record all donation amounts and donor information (name, mailing address, phone number, e-mail) and our Foundation will send out thank you letters and tax receipts to all donors. A sample donation form can be found in **Appendix D**.

Our Foundation can provide an online fundraising page for your event. As these funds will go directly to our Foundation, the fundraising page can not be used to collect funds for anything that would be considered non-donation revenue but will still be counted in your event results. Please contact us to have an online fundraising page created.

Our Foundation must follow strict receipting rules from the Canadian Revenue Agency. Please review the Receipting Guidelines section of this toolkit.

Promote Your Event

Promotion will be a key factor in the success of your event. Create a plan to promote your event based on who you see as the attendees/participants for your event. Social media provides a great way to reach a large audience. Consider creating an event on Facebook as a free way to get your event noticed. Post the event in any social media neighbourhood groups. Create posters for community bulletin boards in coffee shops and grocery stores. Submit your event to free online community or news event calendars. A social media guide for you can be found in **Appendix E**.

Enjoy Your Event

Include a “day of” checklist as part of your action plan so you can enjoy your event and not stress about missing anything. Take pictures and provide some live updates on social media. These can be used for future promotions if you plan to hold a similar event in the future.

After the Event

Once all the fun is completed, count up all the funds raised and record a gross income in your records. Using the non-receipting funds, pay all your expenses and add any leftover funds to your receipted revenue and record a net income for your event. Send your donation forms and revenue to our Foundation within 60 days of your event. If your event had a committee, hold a wrap up meeting to evaluate the event and thank everyone for their participation. Acknowledging donors is a critical part of fundraising success so, when possible, send thank you letters to those that participated in the event. It lets attendees know you appreciated them and it will also allow you to share the final amount raised for our Foundation. A social media thank-you message is a great final promotion. Our Foundation can work with you to create a thank you message that can be included in any donation receipts as well.

Resources

How WE can support YOUR event

Once your event has been approved, the Sandra Schmirler Foundation can provide some valuable support for you including:

- Sample donation form and sponsorship letters
- QR code that links to an event online donation form
- Foundation logos and graphics
- Customized event posters
- Stand up banners that promote our Foundation
- Foundation information cards
- Foundation pins
- Thank you letters and charitable tax receipts (if applicable)

How YOU can help our Foundation

After your event there are a few things you can do to help us

- When sharing how much money was raised at your event please use the net income (after the expenses), as this will be the proceeds received by our Foundation
- Submit all funds within 60 days of the event
- Abide by the rules of tax receipting (page 9)
- Provide photos from the event so we can use them in acknowledging your event

Our Foundation is unable to

There are a few areas where are Foundation is unable to provide help

- Reimburse any expenses
- Provide any contact information for donors
- Solicit prizes or sponsorships
- Apply for liquor licenses
- Apply for liability insurance
- Manage revenue/expenses

Tax Receipting Information

The Sandra Schmirler Foundation, like all other registered charities, must adhere to the Canada Revenue Agency (CRA) Income Tax Act when issuing charitable donation receipts. Detailed guidelines can be found on CRA's Charities and Giving website: www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/issuing-receipts.html. This is necessary to protect our charitable status. We are only able to issue receipts to events registered with us in advance.

Individual Contributions

As an event coordinator you can collect donors' information and the Foundation will issue tax receipts to directly to the donors.

The Foundation requires the following information to issue an official charitable donation:

- The date the gift was received
- The full name and address of the donor
- The amount of the gift
- An email address and phone number if possible
- The amount and description of any advantage received by the donor (if applicable) - see highlighted example below

The minimum amount required for a charitable income tax receipt for the Foundation is \$20.00, unless otherwise requested.

Receipts for Tickets or Entrance Fees to an Event

Once a person receives a benefit in return for their payment, the amount paid is not considered a gift in the eyes of CRA, therefore an official tax receipt is not issued.

However, an individual may receive a partial receipt for the amount paid as part of the CRA's split receipting rules. Split receipting would be used if the ticket or entrance fee price exceeds the fair market value* of the event. The fair market value is often referred to as an "advantage" received by the donor.

An advantage would include:

- Any product or services provided to the participant
- Entertainment
- Food and drinks
- Any other added benefit

For example: an individual buys an event ticket for \$250. The fair market value of the dinner is \$100 and the ticket to see the performer is \$50. The total advantage received by the donor is \$150. The donor is eligible for a tax receipt in the amount of \$100.

Auction purchases (live or silent) and raffle ticket purchases are not eligible for tax receipts.

In Kind Gifts

Individuals who wish to donate an item instead of cash are eligible for a tax receipt only if a fair market value* can be determined using one of the following:

- Providing an invoice or purchase receipt
- Providing a current list price for the item from a recognized commercial enterprise/business operating independently from the donor
- An appraisal from an independent third party at the expense of the donor (this is required for any item valued over \$1000)

**Fair Market Value - as per the Canada Revenue Agency (CRA) website – "is usually the highest dollar value you can get for your property in an open and unrestricted market between a willing buyer and a willing seller who are knowledgeable, informed, and acting independently of each other".*

Business Contributions

If a business makes a donation over \$20 and does not receive any benefit from their contribution (promotion on a poster, listing in a program) a tax receipt can be issued.

In Kind Gifts from a Business

In general, there is no benefit to a business to obtain a charitable donation receipt for a donation of items from inventory. Such contributions are considered a business expense. The Foundation will provide a letter acknowledging the items donated. However, if a business requires a charitable donation receipt, the Foundation will accommodate the request.

A business that donates inventory can deduct the cost of the inventory as a business expense. If a charitable donation receipt is requested by the business, then they are required to include the fair market value of the donated property as income, which is then offset by the deduction of the charitable donation. As a result, no benefit is obtained from the charitable donation receipt.

Gift cards from a business or gifts of service from a business are not eligible for tax receipts. CRA does not view these as an exchange of property but as a promise has been made to provide a service or a product at a later date.

Sponsorship

If a business sponsors a fundraising event, under the CRA rules, the Foundation cannot issue a charitable donation receipt, because the sponsor is receiving a significant promotional benefit. The Foundation will provide a letter of acknowledgment as a receipt for the sponsorship.

However, as sponsorship contributions may be deductible as a business promotional expense. The Foundation can issue a business receipt, upon request.

Use of Logo Guidelines

Once your event is registered with our Foundation, we can provide logos for use on promotional material. They are available in different formats and resolutions.

Logos must not be altered or combined. The logo must be printed in our colours (Pantone 185 Red & Pantone 286 Blue), or in Black and White. When printing in colour, the symbol and the words, FONDATION and FOUNDATION are in Red and the words, SANDRA SCHMIRLER are in Blue.

Please state your event is “In support of”.

For example:

In support of



Licensing and Insurance

Some fundraising activities require special licensing and insurance. Check with local and provincial licensing rules for more information. Please check with your governing offices for information on licenses or permits required for your event.

As a national charity, our Foundation normally cannot apply for any licenses on behalf of your event. However, there are some provinces that will allow our Foundation to apply for gaming licenses for certain type of events. If you need assistance completing any applications, please contact our office.

Our insurance does not cover any events organized by third party fundraisers. Depending on the nature of your event, we suggest you secure your own insurance to cover your activities and volunteers.

Frequently Asked Questions!

1. Will the Foundation cover any expenses?

No, the Foundation will not cover expenses for your event. It is the responsibility of the event organizer to manage the budget so that costs are covered by the revenues. Donations collected at the event cannot be used to cover event expenses, per Canada Revenue Agency regulations.

2. Can tax receipts be issued for attending my event?

Yes and no, depending on what they do at your event. If an attendee donates \$20 or more, a tax receipt will be issued. If an attendee purchased a silent auction item, no tax receipt is issued. The Foundation follows the Canada Revenue Agency regulations as outlined in the Tax Receipting Information (page 9). Please review this section and reach out to us if you have any questions.

3. How do I submit my funds?

Please contact Tanya Martin at 1-866-210-6011 ext 2 or e-mail:

tmartin@sandraschmirler.org to make arrangements to submit your funds. We would love to arrange a cheque presentation with a representative from the Sandra Schmirler Foundation to recognize your support of the Foundation.

4. Will the Foundation provide volunteers for my event?

Due to limited staff and resources the Foundation is unable to guarantee volunteer support at every event, although we wish we could. As a national charity, we have Board members and scholars from across the country who are eager to attend events to help promote the Foundation when possible.

Appendix A: Sample Action Plan

12-6 Months before your event	Person Responsible	Date Completed
Decide on the type of event you would like to organize		
Check for competing events in your area		
Recruit a planning committee		
Register your event with the Sandra Schmirler Foundation		
Figure out all the ways you can generate revenue at your event		
Create a budget with all the expenses and potential revenue		
Set up regular meetings with your committee		
Find your venue		
Order supplies		
Approach businesses for sponsorship or donations		
Create social media presence for your event		
3-6 months before your event	Person Responsible	Date Completed
Create a promotion plan		
Create a list of groups to invite to your event		
Create a list of local celebrities and VIP to invite to your event		
Send out promotional materials for your event		
Send out invitations		
Recruit volunteers for the day of the event		
Create a rain plan (if necessary)		
Create an emergency services plan (first aid kit, trained volunteers)		
Outline logistics (rentals, security, traffic plan, trash, parking etc)		
0-3 months before your event	Person Responsible	Date Completed
Continue to promote your event through social media		
Contact local news agencies/papers with event details for promotion		
Create a day of Action Plan		
Create signage		
Create a volunteer schedule for the event (include contact details)		
Confirm location, set-up details and delivery schedule of any supplies		
Create any scripts for MC or VIPs		

Appendix A: Sample Action Plan

The day of your event	Person Responsible	Date Completed
Arrive early to set-up and handle any last-minute details that arise		
Record all donations and/or ticket sales		
Thank attendees and volunteers as you enjoy your event!		
0-2 months after your event	Person Responsible	Date Completed
Pay all outstanding invoices/expenses		
Send proceeds to the Sandra Schmirler Foundation		
Send donation forms that require a tax receipt to the Foundation		
Send out thank you letters/e-mails to volunteers, sponsors etc.		
Social media announcement with amount raised		
Meet with committee to evaluate your event		
Add any areas for improvement or suggestions to next year's plan		

Appendix B: Sponsorship Package Guide

Your Event Name

Our Story

Why are you putting on this event? What is unique about your event? Why are you raising funds for the Sandra Schmirler Foundation? What is your fundraising goal?

Profile of the Event

List all the important details of your event; what, when and where. Also provide any key aspects such as “will there be food or entertainment” to help the sponsor understand the scope of your event.

Marketing and Promotion

List how and where you will be marketing and promoting your event to provide the sponsor with an idea of their exposure and the audience that will be reached. Will you use social media? Are you creating a website? Will you print posters and where will you display posters? Will you reach out to local media?

How can you become a Corporate Sponsor?

In this section list different sponsorship opportunities. Make sure it clearly states what you are asking for and what they will receive in return. You can have sponsorship packages, i.e., Gold Level or you can ask for the cost of specific items/activities to be sponsored, i.e., “Lunch Provided by Company”. You could also ask a company to match donations or the funds raised at your event.

Example 1:

Gold Level Sponsor Package - \$5,000

Website linked ad on our corporate sponsor website page

Recognition on all paid advertisements for the event

Logo on all printed event materials

Verbal recognition at the event

Silver Level Sponsor Package - \$2,500

Recognition on all paid advertisements for the event

Logo on all printed event materials

Bronze Level Sponsor Package - \$500

Logo on all printed event material

Example 2:

Lunch Sponsor – cost of the meal or set price \$2,500

Recognition on all paid advertisements for the event

Logo on all printed event materials

Verbal recognition at the event

Appendix C: Sample Thank-you Letter

<Date>

<First Name> <Last Name>

<Address>

<City>, <Province> <Postal Code>

Dear <First Name>

Thank you very much for supporting our event, <NAME>, held on <DATE>
at<LOCATION>.

With your support, we were able to raise \$<XXXX> in support of the Sandra Schmirler
Foundation.

Just think of what that means to babies born too soon, too small, or too sick and their families.
Having life-saving equipment close to home and close to family and friends eases the incredible
stress and anxiety at a very difficult time.

Your support gives every baby the chance to grow up to be a champion, just like Sandra and
keeps her legacy of strength, resilience and compassion alive.

Once again, thank you for participating in this event.

With gratitude,

<Your Name>

Appendix D: Donation Form



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We place great value on your trust and are committed to protecting the privacy of personal information. The information you provide will be used for administration purposes, to acknowledge your gift, and to issue tax receipts.

We never release donor names/information.

Donation Amount: _____

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone: _____ E-mail: _____

Tax receipts are sent electronically. Please help keep mailing costs low by providing an email address.

Sandra Schmirler Foundation
18 Burndale Road, Ottawa, ON K1B 3Y5
Toll Free: 1-866-210-6011 ext 2 / email: tmartin@sandraschmirler.org
Charitable Registration # 87142 0410 RR0001



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Appendix E: Social Media Guide

First and foremost, if you are taking pictures, be sure to post at the entrance or include in any information packages that pictures are being taken or that by attending the event individuals are agreeing to be photographed.

Facebook

Create an event listing on Facebook and invite your friends, family and fans to attend.

Ask them to share your event on their Facebook pages.

By leaving the event list open, it encourages your attendees to invite their friends and family as well.

For large or annual events, you may want to create a Facebook page where you can share updates throughout the year as well as update fans/attendees of event details.

Let our Foundation know about your event listing so that we can like the event. If you tag the Foundation (@Sandraschmirlerfoundation) in your posts we will like your post to help increase engagement.

Twitter

Create an event-specific account on Twitter.

Start following individuals who you think would be a great asset to your event and who may be interested in your event. Watch for people who have a large following and tag them to reach their followers.

Tag our Foundation (@Sandraschmirler) in your tweet and use the hashtag #ChampionsStartSmall to identify your event as an event to support the Foundation. The Foundation will try to retweet if we are tagged.

Instagram

Sign up for a free account for your event.

If you are unable to create an event-specific account, we strongly encourage you to use your own personal social accounts to amplify your event.

Tag our Foundation (@Sandraschmirler) in your post and use the hashtag #ChampionsStartSmall to identify your event as an event to support the Foundation.

Share your event photos with your attendees on Instagram after the event.

LinkedIn

If your event has a corporate component, LinkedIn is another platform where it can be shared from either a corporate or a personal account.