

# Community Fundraising Guidelines

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# Why Support CASA and Mental Health Care

## CASA Mental Health

CASA is an established non-profit organization delivering holistic, culturally-safe wrap-around mental health services to Albertans aged three to 18 and their families. CASA provides mental health service to the missing middle – mental health treatment for diagnosed children and youth, in between prevention and promotion in primary and community care, and acute treatment in hospital.

70 per cent of people living with a mental illness experienced symptoms before the age of 18.

1.2 million Canadian children and youth are affected by mental illness. By age 25, that number rises to 7.5 million (about one in five Canadians).

8,000 - The number of people we aim to serve annually by 2025.

## How You Can Help

Community support helps CASA continue treating those who need our services. Our services and programs rely on community fundraisers, donors, sponsors and supporters. In this package, you will find tools and resources to help you organize events and activities in support of CASA Mental Health.

**Thank you for raising awareness and funds for children's mental health, and helping Albertan families get the help they need.**

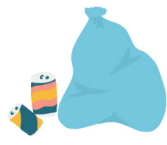


**ACES N SPADES TATTOO NORTH** hosts an annual semicolon tattoo event to raise awareness for mental health, and proceeds support programs and services at CASA.

# Fundraising A-Z



A – Auction



B – Bottle Drive



C – Car Wash



D – Dance-a-thon



E – Endurance challenge



F – Fun Run



G – Garage Sale



H – Hula Hoop Competition



I – Ice Cream Stall



J – Jazz Night



K – Karaoke Contest



L – Lemonade Stand



M – Movie Night



N – Nerf Battle



O – Open Mic Night



P – Pancake Breakfast



Q – Quit a Habit



R – Read-a-thon



S – Scavenger Hunt



T – Trivia Night



U – Used Book Sale



V – Volleyball Competition



W – Wine and Cheese Tasting



X – Xbox Tournament



Y – Yoga with Animals



Z – Zumba-thon

# Planning a Community Fundraiser

## 1. Type of Event

Consider your timeframe, resources and fundraising goals when deciding on your event type. Many of these ideas can be incorporated in the same event to help meet your goals. Here are some ideas to get you started:

\*The Alberta Gaming, Liquor and Cannabis Commission (AGLC) regulates raffles. Visit [aglc.ca](https://aglc.ca) for more information and contact us if you need a licence. We require four weeks' notice to help get you a licence.

## 2. Date and Time

Select the date and time of your event based on your venue, anticipated attendance and type of event. Creating an [Event Timeline](#) will help you stay organized and communicate the schedule to vendors, volunteers and attendees.

## 3. Budget

Use the [Budget Template](#) to help you develop your event budget. Set realistic goals for your expenses, sponsorship and revenue. Remember to include tax in your budget prices.

All expenses are the responsibility of and must be paid for by the event organizers.

## 4. Sponsorship

Sponsors are an effective way to reduce costs and increase revenue on larger events. This [Sponsorship Guide](#) will show you how to approach sponsors and what to offer. You can approach local businesses for cash, in-kind donations (goods or services) or discounts on products. Track your sponsorships using this [Sponsorship Tracker](#). We can provide a letter stating your event will support CASA Mental Health once you have registered with us.

Please note, we are unable to share a list of our sponsors.

## 5. Publicity and Promotion

The event organizer is responsible for publicity and promotion, which is essential if you want to increase attendance at your event. Here are some methods to promote your activity:

- **Social Media** - Facebook, Instagram, LinkedIn, X, Threads, TikTok, influencers.
- **Print Material** - Posters, flyers, brochures.
- **Word of Mouth** - Friends, family, coworkers, intranet or bulletin board at your workplace.
- **Local Media** - Radio stations, news channels, newspapers, websites and blogs.

We will help amplify your promotion efforts by:

- Engaging with tagged posts on social media.
- Sharing your event internally with our staff.
- Sharing your fundraiser on our website under Community Fundraisers.
- Including your fundraisers in our reports to the CASA Board of Directors.

Please provide four (4) weeks' notice if you need a raffle license.



Tag us on social media so we can engage with your posts:

- **Facebook:** [CASA Mental Health](#)
- **Instagram:** [@casa\\_mentalhealth](#)
- **LinkedIn:** [CASA Mental Health](#)

Don't forget to share your promo materials with us when using CASA's name and logo.

Make sure to reference our [Logo Quick Usage Guide](#). Please reach out to us with a copy of your promotional materials before sharing them publicly so we may review the use of CASA's branding.

Refer to this [document](#) for general information about CASA that you can use in your event promotion.

**Event organizers may not speak on behalf of CASA without approval.** With six (6) weeks' notice, we will do our best to arrange a CASA representative to attend your event. See **page 10** for more details.

## 6. Volunteers

Volunteers make the world go round when it comes to charity events. Plan ahead and start recruiting volunteers early in your planning. You will need to plan out volunteer roles and create a schedule. Download this [Volunteer Hours Template](#) to help track your volunteers and their hours. If requested, we are able to provide a letter recognizing volunteers for their hours.

Involvement of CASA Mental Health staff and volunteers will be at the discretion of CASA and will be based on availability, location and the nature of the event. Please note that we cannot provide a list of our volunteers.



When their daughter Emily died by suicide at age 17, **RICK AND STEPHANIE TAYLOR** began their decade-long effort of raising awareness about mental health and supporting CASA House through events like Emily's Memorial Horse Show.

## 7. Sign Up and Registration

There are a variety of tools available to help with tracking sign up and registration for your event. Please connect with us so we can help determine the best solution for your event.

- Ticket sales: we suggest using Eventbrite for ticket sales and registration if a portion will be covering event costs or be split with another organization. If 100 per cent of ticket sales will be donated to CASA, then we can set up your event on our online platform.

- Peer-to-peer fundraising: we can set up your event on our online platform, Raisin, so event participants can raise money via their own personal fundraising page.
- Raffles and 50/50 draws: we can set up your raffle or 50/50 draw on our online platform, Rafflebox.
- Auctions: there are two types of auctions.
  - Traditional auction: Traditional auctions use printed bid sheets and bidding is done in person. Our [Silent Auction Instructions](#) provide some ideas on how to run an effective auction. Download our [Silent Auction Bid Sheet Template](#) and [Silent Auction Item List Template](#) to help your auction stay organized.
  - Online auction: We can set up your auction on our online platform, Ready Set Auction. The event organizer will be given access to the platform and is responsible for adding items and details.

Please note that CASA is unable to share personal information of donors and purchasers who make transactions through our organization, including our online platforms.

## 8. Fund Collection

It is important to be organized when collecting money at events. Funds should be collected and counted based on the source of income (e.g. ticket sales, food and drink, auction, etc.). Two people should be designated as responsible for collecting and securing money.

- Tax Receipts – To be eligible, donors must either complete a [Donor Pledge Card](#) or be included on a [Donor Pledge Form](#). See **page 10** for more information about tax receipts.
- Cash – Use this [Cash Count Sheet](#) to stay organized. It is recommended that two people count all cash. Please do not mail cash.
- Cheques – To be made payable to ‘CASA Mental Health.’
- Credit Cards – Information can be listed on their [Donor Pledge Card](#) and processed by CASA Mental Health in the following business days.

Please refer to section **12. Post Event** later in this package for more information on arrangements for fund collection.

## 9. Insurance

You may require special event liability insurance if your event is being held on public property. Event organizers are responsible for providing their own insurance coverage. Check with your event venue or municipality to ensure that you are covered. If requested, the event organizer must provide proof of insurance.

CASA Mental Health does not provide insurance coverage nor will we assume any legal or financial responsibility relating to the community fundraiser.

## 10. Legal and Safety

### Canadian Revenue Agency Regulations

It is critical that CASA Mental Health and all those raising money for CASA are compliant with Canada Revenue Agency’s regulations. If we do not follow their regulations, CASA risks losing its charitable status and its ability to raise money.

**All non-profit organizations are required to follow CRA regulations.**

## Licences

There can be a variety of licences that are required for an event. Some common licences include:

- [AGLC Liquor Licence](#) - Event organizer must apply at least eight (8) weeks in advance. Many venues will already have a liquor licence.
- Raffle - If your event includes a prize or 50/50 raffle please give us four (4) weeks' notice. Then, complete our [Raffle Licence Form](#) and return it at least two (2) weeks prior to your event so we can apply for the licence on your behalf. Download our [Raffle Count Sheet](#) and view the [AGLC Raffle Terms and Conditions](#) for more information.

## Emergency Response

Make sure you have a safe venue with appropriate security and fire protection. An emergency plan should be established and communicated between all staff and volunteers prior to the event.

The event organizer shall indemnify and save harmless CASA Mental Health and its directors and officers from and against any loss, expense, claim, liability, damage or action which may arise directly or indirectly from the operation of the activity.

## 11. The Event

Post on social media and tag us during your event.

During the event, check in on staff and volunteers to answer questions and help solve problems. Engage with your guests and make sure they feel welcome. Most importantly, have fun!

We encourage you to post and tag us on social media during your event so we can engage with and amplify your fundraising efforts. See section **5. Publicity and Promotion** for CASA's social media handles.

It is important to engage with your sponsors during the event, both in person and on social media. Make sure you complete what was outlined in your sponsorship agreement.

## 12. Post Event

### Give Thanks

After the event, it is important to thank all the people who helped make it a success, especially your sponsors, donors, volunteers and attendees. This can be done through a gift, thank you card or simply an email. The level of thank you should correspond with their involvement and support of the event.

Is there a community donor, staff member or volunteer who helped make a big difference with your event? Let us know and we can help thank them on behalf of CASA!



**PRESCHOOL AND AFTER SCHOOL CARE STUDENTS AT ÉCOLE GABRIELLE-ROY** reached their fundraising goal by making and selling playdough, bracelets and artwork.



Does a community member or donor have a lived experience story or want to share why they support CASA and mental health care? We can get in touch with them to collect their story! With their permission, please send us their name, email and/or phone number.

## Fund Reconciliation

Please reconcile all funds once your fundraiser is complete. Once funds have been received by CASA, we are unable to provide any reimbursement to community donors or fundraisers. The Canada Revenue Agency (CRA) stipulates that a registered charity cannot return a donor's gift. Once the transfer is made, the charity is obliged to use the gift to carry out its charitable purposes.

After counting and recording all funds, get in touch with us to arrange collection of your funds and donor cards.

Funds must be received by CASA within 30 to 90 days of the fundraiser. Do not send cash in the mail. Please write a cheque or money order for the value, or reach out to us to arrange fund collection.

## Review

Create a list of pros and cons about the event as a guideline for future events. Compile useful information such as attendance, attendee demographics and photos which will assist in promoting the event and acquiring sponsors.

Here are some questions to guide your review:

- Did you meet your goal? Why or why not?
- What worked well?
- What was the highlight of the event?
- What did you like least about the event?
- Did you experience any major challenges?
- What are your better ifs?
- Did you receive any positive or negative feedback from participants?
- Would you do it again?

## CASA Support

We love our community fundraisers and want to see your initiative succeed. Upon request and approval from our Philanthropy Officer of Community Fundraising, CASA can provide the following:

- Professional advice on event planning and fundraising.
- Event planning templates.
- Access to online platforms for ticketing, peer-to-peer fundraising and raffles.
- CASA Mental Health promotional materials (e.g. brochures, banners).
- CASA Mental Health logos for promotional materials.
- A support letter verifying that your event is raising funds for CASA Mental Health.
- A letter to volunteers recognizing their hours.
- Guidance and licences for raffles.
- Social media support through engaging with and amplifying posts you tag us in.

CASA  
helps  
recognize  
your donors  
by making  
personal  
thank you  
calls.

## CASA Mental Health Speaker

If you would like a CASA Mental Health representative to speak about CASA or accept a donation, please contact our Philanthropy Officer of Community Fundraising. All requests must be specified six (6) weeks prior to the event. Although CASA will try its best to accommodate such requests, we cannot guarantee that a representative will be available to attend or participate in the event. If that is the case, we can provide information about CASA to share with your event participants and donors.

## Tax Receipts

### RECEIPT ELIGIBILITY

CASA Mental Health is a registered charitable organization and is able to issue official income tax receipts for donations over \$20. In order to receive a tax receipt, we must have the donor information for that payment, including first and last name and full mailing address. For in-kind donations, the donor must provide proof of fair market value. CASA will also provide non-official tax receipts for businesses who sponsor your event.

Please note that we cannot provide a list of our donors.

### NON-ELIGIBLE ITEMS

A tax receipt cannot be issued when the donor receives something in exchange for their purchase, such as tickets for raffles, auction items or gift cards\*.

\*Gift cards purchased by an individual and donated are eligible if proof of value is submitted. Gift cards donated by the issuer (retailer/business that creates the gift card) are not eligible.

CASA  
issues  
charitable tax  
receipts for  
donations  
over \$20.



Mental health care is incredibly important to parent and owner of Navina Yoga, **MEG STEVENSON**, who holds an annual yoga in the park event to support CASA's work.

### PARTIAL RECEIPT

A purchase is eligible for a partial receipt when it includes a donation. For example:

- A dinner event sells tickets for \$100 of which \$30 is food and beverage cost (fair market value). The remaining \$70 is eligible to be tax receipted.
- An auction purchaser is eligible for a tax receipt if an item is sold for more than its appraised value and the appraisal value is less than 80 per cent of the selling cost.

It is the responsibility of the event organizer to determine fair market value, but please let us know if you need assistance. Ensure you are clear with your donors about when they are eligible for a tax receipt. For more information, see our [Tax Receipt Guideline](#).

**CASA Mental Health reserves the right to change or add to these rules as needed. We must adhere to Canada Revenue Agency's operating and legal standards.**

# Contact Information

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Philanthropy Officer, Community Fundraising

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[www.casamentalhealth.org](http://www.casamentalhealth.org)

Charitable number: 13017 8734 RRR0001.

## THANK YOU!

CASA Mental Health is grateful for your support.

Scan the QR code to view this document and related resources online.

