Ontario Disaster Relief Assistance Program

Guidelines for Disaster Relief Committees

Fundraising Toolkit

Ontario

Chapter One: What is Fundraising

Introduction

This toolkit is provided as part of the *Guidelines for Disaster Relief Committees*, a publication of the Ministry of Municipal Affairs and Housing for disaster relief committees. This toolkit should be read in conjunction with the guidelines.

The Fundraising Toolkit has been prepared to assist municipalities and community volunteers charged with the responsibility of raising disaster relief funds as part of the Ontario Disaster Relief Assistance Program (ODRAP). This toolkit contains suggestions for raising money in your community. It provides examples of successful fundraising programs, along with the key elements required to administer fundraising operations of any size.

ODRAP is intended to alleviate hardships suffered by *private homeowners, farmers, small business enterprises and non-profit organizations* whose essential property has been damaged in a sudden and unexpected natural disaster such as a severe windstorm, tornado, flood, forest fire or ice storm.

ODRAP provides funds to those who have sustained heavy losses for essential items such as shelter or other "necessities of life." Municipalities may also receive assistance under ODRAP, although the process is somewhat different.

In the event of a natural disaster, individuals are expected to bear the initial responsibility for their losses. If the losses are so extensive that individuals cannot cope on their own, the municipality and the community at large are expected to provide support through fundraising activities.

The Minister of Municipal of Municipal Affairs and Housing is authorized to declare a "disaster area" for the purposes of the ODRAP program. The municipal council asking for assistance under the ODRAP program must first adopt a resolution outlining the following:

- The municipality's request for a disaster area declaration and
- Whether all or a specified portion of the municipality is to be declared a disaster area.

Once the Minister declares a disaster area, the municipal council of the affected municipality must then appoint a Disaster Relief Committee (DRC) as quickly as possible to deal with private and non-profit losses and damages.

The purpose of the DRC is twofold: to raise funds for the benefit of disaster victims, and to settle the eligible claims of these victims, private and non-profit, as efficiently as possible. The province will contribute up to two dollars for every local dollar raised to an amount necessary to settle all the eligible claims - up to 90 per cent of all eligible claims. Therefore, no surplus funds are created.

All contributions to the fund must be unconditional; that is to say that no contributions to the fund may be earmarked for a particular person, group of persons or geographic area.

The municipal council appoints the DRC members from among its citizens and chooses persons from different backgrounds, excluding members of council. The DRC's work will usually take from six months to one year to complete.

One of the first tasks of the DRC is to appoint a fundraising subcommittee. The fundraising subcommittee will solicit contributions and collect money for the disaster relief fund, organize fundraising events and activities, act as a liaison to media for fundraising purposes and place advertising. Experience demonstrates that timing is critical in any effort to raise funds. Accordingly, the sooner the fundraising subcommittee is established, the greater its chances of meeting its financial goal. In addition, claims cannot be settled until fundraising activities have been concluded, except in extreme hardship cases.

Understanding Fundraising

Many assume that community fundraising is based on special events and "passing the hat," and any group of community minded citizens should be good at it. In reality, successful fundraising appeals take planning, organization and hard work. They also fulfill a community need, and provide those involved with a sense of accomplishment and pride.

Successful fundraising does not just happen. It is based on a number of proven principles, some of which include:

- People give to people, not causes or organizations.

- Organizations or committees have no needs. The community has the needs.

- Fundraising is about identifying existing and potential constituencies of support, and providing the means to encourage their involvement and investment in the cause.

- Effective fundraising programs require resources and support.

- Top calibre community volunteer leaders are essential to provide leadership for the fundraising campaign, to personally give to the campaign, and to urge others to do the same.

- The ability to communicate your story is as important as the story itself.

- People do not give if they are not asked.

- Fundraising requires solid organization and comprehensive planning.

- 80 per cent of the funds raised will come from 20 per cent of the donors.

- You cannot ask someone to give if you are not willing to give yourself.

- Treat every prospective donor as you would like to be treated - with respect, appreciation and acknowledgement.

Why Do People Give?

Understanding what motivates people to make financial donations to assist others involved in a natural disaster will enable you to develop a fundraising plan that is efficient and in sync with donor thinking.

Canada was built upon a rich tradition of philanthropy. Without it, we would not have many of the cultural, educational and health institutions we have today.

Philanthropy is defined as love towards mankind - the disposition to promote the well-being of one's fellowmen. Philanthropy, in one form or another, crosses all cultural and religious groups. That being said, there are five primary reasons why people support charities and community causes. Most human giving is based on one or a combination of several of them.

Religious or Political Conviction

Charity and philanthropy are a key part of most of the world's religions. Many of our top community charities were originally established by religious orders. At the same time, most religions are also charities and are widely supported financially by their followers. People give to their religion to enable it to carry out its charitable and philanthropic works.

People support political organizations, including a host of special interest groups, such as human rights organizations, in the same way. Donations 'will' or 'can' further their political beliefs and provide a "better society" for all.

Social Pressure and Convention

Many people give because it is fashionable to do so. They want to be seen to be supportive of a cause. They give after they see that people they recognize, like certain celebrities, have supported the project or endorsed the cause. Social pressure, social convention, fashion and personality all play a role in motivating donors.

Giving Something Back

People give to ensure that services, facilities and social welfare will be available to them or someone near to them in the future should the quality of their lives change.

Social Responsibility

In earlier times many of our public institutions were funded by philanthropy. As support for many of these institutions is now in decline, their futures are once again dependant upon the generosity of the public. Many people in society have always felt it is part of their responsibility to provide for those less fortunate than themselves. This sense of social responsibility has now spread to a broader population than the handful of rich philanthropists that once led the way.

Emotion

Emotion underpins the support of just about every public charity. Many decisions to support a cause are made for emotional reasons that are then rationalized.

People give from their hearts, not with their heads. Pity is one of the strongest emotions. It is defined as a feeling of tenderness aroused by the misfortune or suffering of another, prompting a desire for relief. Other emotions such as anger, pride and love are also effective tools for opening pocketbooks.

Successful fundraising appeals are designed by keeping what motivates a donor to give front and centre in the planning process. In the case of fundraising in the event of a natural disaster, some aspects mentioned above will help motivate donors.

Resources to Help You Learn More About Fundraising

A number of excellent books, publications and websites are available on the subject of how to be a good or better fundraiser. Some of these are:

Books

Burnett, Ken. Relationship Fundraising: A Donor-Based Approach to the Business of Raising Money. The White Lion Press, Ltd. 1993.

Forfar, Scott. The Gift Planning Workbook: A Practical Guide for Managing a Gift Planning Program. Ontario Community Support Association, 2001.

Greenfield, James M.
Fund-Raising: Evaluating and Managing the Fund Development Process. John Wiley & Sons, Inc. 1991.

Kotler, Philip and Andreason, Alan R.
Strategic Marketing for Nonprofit Organizations. 3rd Edition. Prentice-Hall, Inc., 1987.

Lawson, Douglas M. Ph.D.
Give to Live: How Giving Can Change our Life. ATI Publishing, 1991.

Minton, Frank and Somers, Lorna.
Planned Giving for Canadians: A Guide to Instituting and Managing a Successful Planned Giving Programme, 2nd Edition. Somersmith, 1997.

Mixer, Joseph R. Principles of Professional Fundraising: Useful Foundations For Successful Practice. Jossey-Bass Publishers, 1993.

Panas, Jerold. Mega Gifts: Who gives them, who gets them. Pluribus Press, Inc., 1984.

Pearce, Edward. Ph.D. and Kushner, Rodney S.
Planned Giving: Making It Happen 2 Volumes. Strategic Ink Communications. 1996.

Prince, Russ Alan. The Seven Faces of Philanthropy. Jossey-Bass Publishers, 1994.

Rosso, Henry A. and Associates. Achieving Excellence in Fund Raising. Jossey-Bass Publishers, 1991.

Seymour, Harold J. Designs for Fund-Raising. The Fund-Raising Institute, 1988.

Sharpe, Robert F. Planned Giving Simplified: The Gift, the Giver and the Gift Planner. John Wiley & Sons, Inc. 1999.

Online Resources (The following are not websites of the Province of Ontario. The Ministry of Municipal Affairs and Housing is not responsible for the content of these websites.)

Association of Fundraising Professionals (www.afpnet.org)

Association of Fundraising Professionals Toronto Chapter (www.afptoronto.org)

Association for Healthcare Philanthropy (www.ahp.org)

Additional online resources can be found at the following websites:

Canadian Centre for Philanthropy (www.ccp.ca)

CCRA Charities Division (www.ccra-adrc.gc.ca/tax/charities/)

Charity Law (www.charitylaw.ca)

Charity Village (www.charityvillage.ca)

The Chronicle of Philanthropy (www.philanthropy.com)

Citizens Handbook (www.vcn.bc.ca/citizens-handbook)

The Foundation Centre (www.fdncenter.org)

Gifts In Kind Canada (www.giftsinkindcanada.org)

Gift Planning Resource Centre (www.cam.org/~gprc/)

Strategies for Effective Proposal Writing (www.healthycommunities.on.ca)

Volunteers Online (www.volunteersonline.ca)

These resources will help new fundraisers gain insight into motivating donors, the most effective techniques and increasing the size of gifts for community-based fundraising. Experienced fundraisers can refresh themselves on the principles of good fundraising and learn about new methodologies and ways of increasing the return on fundraising resources. This information should be available to all interested fundraising volunteers, especially those taking a leadership role on the DRC Fundraising Subcommittee.

Chapter Two: Fundraising Subcommittee Structure

Fundraising Subcommittee

The Disaster Relief Committee (DRC) sets up a minimum of two subcommittees namely, fundraising and claims settlement, depending on the number of members on the DRC. The membership of the subcommittees should be no more than five members. The Fundraising Subcommittee is responsible for the planning of the appeal and the implementation of the fundraising plan through a variety of working groups that report to the fundraising subcommittee chair.

The responsibilities include:

- Soliciting contributions and collecting money for disaster relief fund
- Recommending fundraising policies to the Disaster Relief Committee
- Organizing fundraising events and activities
- Preparing presentations and advertisements for press, radio and local displays
- Drafting all solicitation letters for corporations, institutions, community organizations, service clubs, etc.
- Reporting to the Disaster Relief Committee on the status of the fund-raising activities and the funds raised.

The responsibilities of the Fundraising Subcommittee Chair and the various working groups that could be useful in a typical disaster are outlined here.

Fundraising Subcommittee Chair

The Chair of the Fundraising Subcommittee is appointed by the DRC. The Chair is responsible for:

- Recruiting additional volunteers to the Fundraising Subcommittee (Please see the Volunteers section in Chapter Three of this document for more discussion on the special fundraising skills of volunteers.)

- Ensuring that appropriate resources are available for the subcommittee to carry out its responsibilities

- Chairing regular meetings of the Fundraising Subcommittee

- Working with Working Group Leaders, to ensure their tasks are executed in a timely and effective manner

- Ensuring the Finance and Accountability Working Group works closely with the treasurer of the DRC to ensure all financial and accounting practices are followed

- Reporting to the DRC on fundraising activities and progress

- Acting as one of the spokespersons for the appeal.

The Chair of the FSC may give a gift to the appeal and may solicit other DRC members for their own individual donations.

Working Group Leaders

The leader of each working group is responsible for overseeing the daily operation of their particular group. The working groups report to the Fundraising Subcommittee Chair. Specific responsibilities include:

- Recruiting an appropriate number of members to the working group

- Ensuring that appropriate resources are available for the working group to carry out its responsibilities

- Chairing regular meetings of the working group

- Working with working group members to ensure their tasks are executed in a timely and effective manner

- Reporting to the Fundraising Subcommittee on the activities and progress of the working group

- Acting as a spokesperson for the appeal, if required by the subcommittee chair.

The leader of each of the working groups may give a gift to the appeal and may solicit members of each of the working groups for their own individual donations.

Finance and Accountability Working Group

This working group is responsible for designing, implementing and monitoring the process for handling monies collected through fundraising activities. This includes collection, banking and financial reporting, usually done by the municipality for the DRC. One of the key tasks of this group is to ensure transparency and provide assurance to the public that all monies collected can be accounted for and are handled appropriately. This working group would have a close working relationship with the DRC treasurer. The treasurer has direct responsibility for many activities that will involve this working group. (See the duties and responsibilities of the Treasurer of the Disaster Relief Committee under Section Two of the *Guidelines for Disaster Relief Committees*, a publication of the Ministry of Municipal Affairs and Housing.)

Donation Processing Working Group

(Receipting, Acknowledgement and Recognition)

This working group is responsible for designing, implementing and monitoring the process for receipting, acknowledging and recognizing all gifts to the campaign. These tasks are usually done by the municipality. While much of the day-to-day activities of this committee may be done by municipal staff, the committee is responsible for ensuring that appropriate procedures and guidelines are established and followed.

Marketing and Public Relations Working Group

This group of volunteers is in charge of developing materials for the fundraising campaign and information. This includes developing a close working relationship with local and provincial media. Suggested methods are included in a later section of this document.

Corporations Working Group

This group of volunteers identifies, cultivates and solicits corporate support for the fundraising campaign. Much of their work involves personal visits with prospective donors.

Community Organizations Working Group

This working group is responsible for the identification, cultivation and solicitation of community organizations such as service clubs, sports organizations, unions, ratepayer groups and faith organizations. Most community organizations use special events and other fundraising methods of their own to generate funds for the campaign. The working group must ensure that appropriate guidelines are in place to enable community organizations to operate freely, but within the framework of the broader appeal. Such guidelines would include third party event policies and gift acceptance, processing, acknowledgement and recognition polices. (For further details, see the administration section of this document.)

Schools Working Group

This working group provides area schools and boards of education with opportunities to participate in their own fundraising activities for the campaign. This type of activity is often welcomed as part of teaching young people social responsibility. Appropriate guidelines will have to be in place to ensure that activities are co-ordinated and monies are collected according to the policies established by the working group.

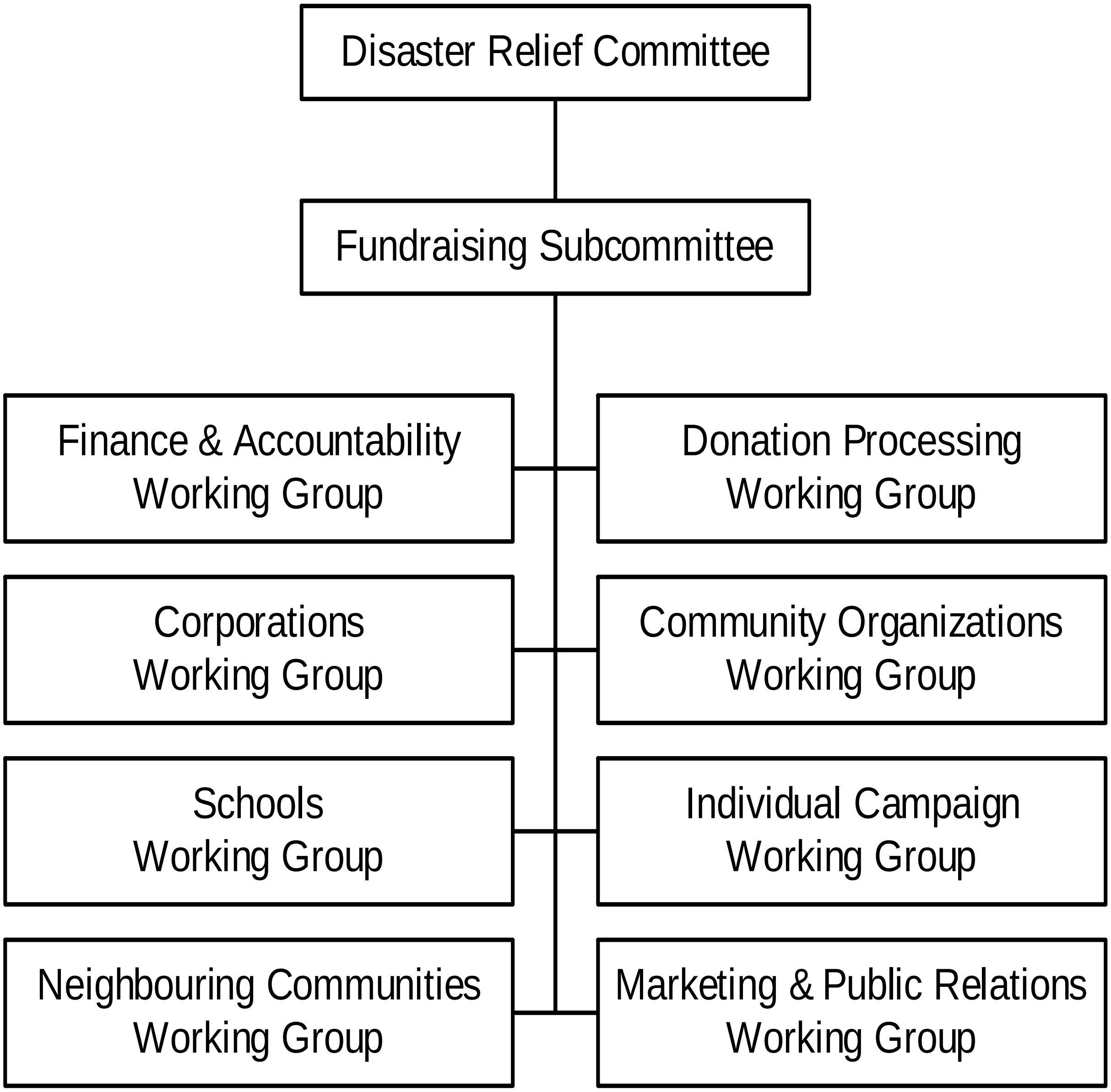
Individual Campaign Working Group

This working group cultivates and solicits individual donors. (A variety of solicitation techniques are described in Chapter Four of this document.)

Neighbouring Communities Working Group

This working group encourages the participation of neighbouring communities not directly affected by the disaster to become donors and participate in fundraising activities of their own for the campaign. This committee works closely with other committees where their expertise may be appropriate for neighbouring communities.

Organization Chart



Chapter Three: Elements Required for Fundraising Success

Volunteers

One of the first tasks of the Fundraising Subcommittee will be to recruit sufficient volunteers to perform the many tasks involved with fundraising.

Volunteers are the backbone of any successful fundraising operation. Early success in this campaign will be determined by the ability to recruit the right volunteer leaders - those with the ability and willingness to exercise influence on other volunteers and prospective donors. These leaders must also be willing to commit both time and financial support to the campaign.

The most prevalent reason why anyone gives to a cause is because they are asked to give by someone they know and respect. Volunteers make appeals with credibility, clout, connections and free labour. Volunteers with passion for the cause and dedication to their community donate not only their time but their affluence and influence. Donors rarely give when asked by paid staff or fundraisers. It takes volunteers who have clout with their peers to get substantial gifts.

Volunteers with special skills and connections are required for the DRC Fundraising Subcommittee and to assist the working groups.

These skills include:

- Connections to local business, provincial and national corporations
- Connections with service clubs, church groups, sports clubs and other community organizations
- Communications and public relations background or connections
- Clerical and administrative skills
- Financial and/or accounting skills
- Communication and presentation skills

- Access to creative and printing services

- Access to meeting and transportation facilities.

Who are Your Prospects

The first step in soliciting gifts is knowing whom you are going to ask. Potential donors must be identified. These include individuals, corporations, community organizations and foundations that are known to be sympathetic to the cause, have a direct/indirect involvement with the disaster, or have a history of giving to similar causes and are motivated and capable of making a gift.

The names of these potential donors can be collected from a variety of sources.

- Municipal offices will have lists of service clubs, community organizations and businesses with local business licenses.

- Chambers of Commerce will have lists of local corporations and unions.

- Volunteer Bureaus will have names of individuals willing to provide help in the community.

- School Boards will have lists of schools in the area.

- Local Ecumenical Councils will have the names of faith groups.

- Phone directories will have names of businesses and local service organizations.

- Fundraising Subcommittee members and elected officials will have names of individuals with a reputation for being community-minded.

- A list of Ontario municipalities is in the Ontario Municipal Directory, which is published by the Association of Municipal Managers, Clerks and Treasurers of Ontario.

Through discussion, research and evaluation, the subcommittee decides which potential donors should become prospects and assigns each prospect to the appropriate working group. Prospects fuel the fundraising machine. The availability of identified, qualified and motivated prospects is essential for any successful fundraising operation.

Developing a Fundraising Plan

Any successful fundraising operation must start with a strategically crafted plan, one that is viable and will produce clear measurable results. This plan will act as a blueprint or roadmap for the Fundraising Subcommittee as it moves toward meeting the financial goals needed to support ODRAP claims.

The Fundraising Subcommittee is responsible for developing the plan and ensuring that it is continually updated and followed stringently. Elements of the plan should include:

- A monetary goal and rationale for the goal based on the projected number of claims and estimated settlement amounts
- The resources required including collaborations with other organizations (as necessary)
- Fundraising methodologies or tools to be used such as special events, direct mail, advertising and public relations, corporate payroll deductions, etc.
- Roles and responsibilities
- Timelines
- Authority and reporting structure
- Recognition opportunities
- Stewardship and gift acknowledgement.

The plan must be vetted by the DRC and must have approval of all those involved in leading the plan's implementation. Elements of the plan are discussed throughout various sections of this document.

Sample Task List and Timeline

Activity	Timeframe	Responsibility
Create DRC	Week 1	Municipality
Create Fundraising Subcommittee (FSC)	Week 1	DRC
Appoint FSC Chair	Week 1	DRC
Appoint Marketing/PR Chair	Week 1	FSC Chair
Appoint other working group leaders	Week 1-2	FSC Chair
Appoint members of working groups	Week 2-4	Working Groups' Leaders
Develop working groups' plans	Week 2-3	Working Groups' Leaders
Develop case for support	Week 2-3	Marketing & PR Working Group
Develop marketing & media tools	Week 2-3	Marketing & PR Working Group
Establish banking arrangements	Week 2-3	Finance/Accountability Working Group
Establish 1-800 service	Week 2-3	Marketing & PR Working Group
Develop fundraising plan	Week 2-3	FSC
Approval of fundraising plans	Week 3	FSC/DRC
Develop prospects list	Week 2-4	All Working Groups
Launch media program	Week 3	Marketing & PR Working Group
Establish gift acceptance and processing procedures	Week 3	Finance/Accountability Working Group.
Develop donor recognition program	Week 3	FSC
Research major prospects	Week 3-4	Corporate, Community Org, Individual Working Groups

Activity	Timeframe	Responsibility
Launch website	Week 3	Marketing & PR Working Group
Develop personal visit program	Week 3-4	Corporate, Community Org Working Group
Volunteer training	Week 4	Corporate, Community Org. Working Group
Launch corporate appeal	Week 4	Corporate Working Group
Launch community organization appeal	Week 4	Community Org. Working Group
Develop direct response program	Week 3-4	Individual Campaign Working Group
Launch neighbouring community appeals	Week 4	Neighbouring Communities Working Group
Launch schools appeal	Week 4	Schools Working Group
Launch individual appeal	Week 5-6	Individual Campaign Working Group
Weekly updates	Week 2 on	Working Groups' Leaders

Major Activity Timelines

	Week								Month			
Activity	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**3**	**4**	**5**	**6+**
Create DRC												
Create Fundraising Subcommittee (FSC)												
Appoint FSC chair												
Appoint Marketing/PR leader												
Appoint other working groups' leaders												
Develop fundraising plan												
Develop case for support												
Develop marketing/media tools												
Launch media program												
Establish gift acceptance process												
Establish banking arrangements												
Establish 1-800 service												
Develop donor recognition program												
Establish alliances												
Develop prospects list												
Research major prospects												
Launch website												
Develop personal visit program												
Volunteer training												
Corporate appeal												
Community organizational appeal												
Develop direct response												
Neighbouring community appeal												
Schools appeal												
Individual appeal												

Weekly updates												

Building Your Case for Support

The case for support is your story. It's who you are, why money is needed and how you will meet that need with the money you raise. The case for support provides the basis for all other published materials. It sets the tone, style and flavour of appeal communications, and speaks consistently through media releases, presentations, brochures, newsletters, donor reports and more.

An effective Case for Support is like an investment prospectus for a business. It is designed to attract donors who are, after all, investors. The case also must move people both intellectually and emotionally.

The right facts and logic must be outlined, but the facts alone will not carry the day. When a case is written for donors, it has to touch them where they live and breathe. They need to feel that investing in the appeal will make life better for them, their children, their neighbours and their friends. In order to move people at this level, it is essential to make the case larger than the immediate need.

The best cases present a vision of the future of the community, one that people find attractive, achievable and worth working for. The case demonstrates how donor participation can make a special contribution to building that future. Prospects must be inspired and challenged to play a part in making it happen. They should feel that the time for action is now.

The case for support should be short, easy to understand and compelling. The case for disaster-related fundraising must address the following elements:

- The reason for need (describe the disaster and the needs that it has created for people)

- How much money is needed

- How the money will be used and who will determine its use

- Who is on the Disaster Relief Committee, their authority and why they are responsible for fundraising

- What guarantees there are that the money will be used for the purpose it was given
- What sort of recognition will be given
- Will receipts be issued for tax purposes, by whom and when
- How long will the appeal last
- What happens if more money is raised than what is required
- Where to go for further information.

Helping victims of the Flood

On October 30th this year, raging waters of the Taylor River forced hundreds of residents to flee their homes, leaving behind thousands of dollars of damage and resulting in the area being declared a disaster area by the provincial government. The devastating waters forced residents to temporary shelters with nothing more than the little they could carry with them. Now that the floodwaters are receding, some families are returning to their homes to find them in ruin. It is estimated that of the 150 homes damaged by the flood, over half are not fit to live in with others requiring weeks of restoration.

Flood victims are discovering that the suffering caused by a disaster can continue long after news of it disappears from the front pages of the newspapers. At a minimum, residents face the chore of cleaning up and repairing damage to their homes. For others, it will be far worse.

At the request of the Town of Taylor, the Ministry of Municipal Affairs and Housing declared the region a "Disaster Area" for the purpose of the Ontario Disaster Relief Assistance Program. This means that the province will work with local disaster relief fundraisers to help residents cover some of the costs associated with getting their lives back to normal. For every dollar raised by the community, the province will contribute up to a ratio of 2:1 for those basic recovery needs not covered by insurance or other agencies. Your financial support will be instrumental in securing this important provincial financial assistance.

A volunteer committee has been appointed by the Town of Taylor to spearhead the local fundraising effort. The disaster relief committee has set a tentative fundraising target of $ amount to provide assistance to homeowners, farmers and small businesses whose essential property has been damaged in this (name the disaster). A tremendous community response will be needed to help those less fortunate who have suffered such losses.

The Disaster Relief Committee is also responsible for appraising losses and settling claims in accordance with the terms of the Ontario Disaster Relief Assistance Program.

How to Help

Public donations will make a world of difference in the lives of those families affected by the Taylor River flood. Donate today by calling 1-800-xxx-xxxx, online at www.taylorriverdisaster.ca, or by visiting any branch of the *bank* in the Taylor River area. Donation of goods should be directed to (name the organizations such as Red Cross, Salvation Army, etc.)

Creating a fundraising event is a powerful way of turning the care and concern of your company or social group into action and assistance. Contact the Disaster Relief Committee for guidelines on fundraising events and corporate donations.

This is an opportunity to help your neighbours devastated by the Taylor River flood. Many families have suffered severe losses. Many of those families do not have insurance to cover losses or provide for their basic needs in the weeks ahead. Some evacuees have been unable to work. As in all disasters, the total impact of the flood will not be known for several months. However, initial estimates place the damage in excess of $XXX,XXX.

For more information contact XXX

Chapter Four: Fundraising Activities

Establish Alliances

The more people and organizations involved in a fundraising program, the easier the task becomes. There are many organizations, corporations and community groups that have the people power and inclination to help their community. Involving these groups in the fundraising effort will save time and increase chances for earlier success.

It is important to work in collaboration with others early in the process and set out in writing the expectations and responsibilities of all parties. This ensures no confusion and prevents potential conflicts, especially over the handling of funds.

Organizations willing to play a role in community fundraising are outlined in this section.

Salvation Army

The Salvation Army's mission in Emergency and Disaster Response is to minister to the emotional, spiritual and physical needs of survivors and emergency management workers. It is capable of all five emergency social services – emergency feeding, emergency clothing, emergency lodging, registration and inquiry, and personal services. It also provides administrative services for the organization of volunteers and management of emergency shelters.

The Salvation Army's policy and its local membership allow it to co-operate with international relief agencies and governments alike.

In the wake of a disaster, whatever money raised by the Salvation Army in any jurisdiction is used for victims in that jurisdiction. Any leftover funds would be used for future needs in that community.

Canadian Red Cross

The Red Cross is the default charity for many Canadians wanting to contribute to help those affected by a disaster. The Red Cross has well-established fundraising techniques and infrastructure enabling it to collect significant sums of money within a relatively short period after a disaster. However, it is essential that an early relationship be established between the DRC Fundraising Subcommittee and the Red Cross to ensure that funds raised can be used for ODRAP purposes. The Red Cross does charge an administrative fee to collect and process funds and will want to use any money not required by ODRAP for Red Cross relief programs in other areas.

Canadian Tire Corporation

The Canadian Tire "Foundation for Families" was established to provide a helping hand to families in crisis by ensuring life's basic needs are met: food, shelter, clothing and essential goods. Canadian Tire encourages its dealers to become involved in community disaster relief; dealers have a local budget to spend on charitable causes according to set criteria. In addition to donating product, they are willing to consider using their stores as donation drop-off points, and encourage their staff to become involved in special events and other activities to help raise money.

Depending on the nature and scale of a disaster, a corporate donation may also be considered. Canadian Tire also directs some of their charitable contributions to established national disaster relief agencies and service organizations.

Tim Hortons

This company supports its franchisees in being active in community disaster relief and fundraising through the donation of product and facilities. Each storeowner has the ability to become involved in fundraising activities, and corporate financial support may also be considered. Communications and public relations staff at their corporate headquarters will also help with fundraising promotion where local stores are involved. Tim Hortons also supports established national disaster relief agencies and service organizations.

Liquor Control Board of Ontario

The LCBO will use its facilities and infrastructure to support local disaster relief and fundraising. They will also consider using part of their extensive advertising and promotion budget to support local fundraising appeals.

Bell Canada

Given that many Bell employees live and work in so many communities across the Province, they are often called upon to provide volunteer assistance during times of crisis. Bell Canada has over 25,000 employees in Ontario. Regional Liaison Managers have responsibility by area code for the province, and are key contact points in the community with the ability to liaise with team Bell, local governments and non-profit groups, and the public. They also have access to volunteer teams that include hundreds of Bell staff.

Bell Canada has an employee fund that provides up to $2,500 to non-profit groups where Bell employees donate 50 hours or more of volunteer time. This is potentially of assistance following an emergency, where community-based fundraising is taking place.

Building Alliances and Working with Collection Agencies

These are only a sample of some of the organizations across the province that may be willing to assist in disaster relief and fundraising. The amount and type of involvement usually depends on the location and nature of the disaster. For more details, contact a representative from these organizations in your local area. There are many other companies, organizations and related charities that would also be willing to lend a hand to assist with ODRAP fundraising and relief efforts. It is important that contact with organizations is made early and arrangements be confirmed in writing.

Some entities are registered charities and, as such, are able to issue receipts for income tax purposes. They can also become collection agencies for the committee. Examples of potential collection agency arrangements would be the Canadian Red Cross, the Salvation Army and most incorporated municipalities. If the committee enters into an arrangement with such an organization, an agreement must be in place before any fundraising is undertaken by the organization. The organization or agency is then able to issue receipts for all funds they receive and would remit them to the committee in lump sums on a regular basis (e.g. weekly). If agency costs are involved as part of the aforementioned agreement, the agency's eligible administration expenses may be treated as administrative expenses of the committee.

If municipalities serve as collection agencies, their respective treasurers can issue official receipts for income tax purposes. When a municipality remits a lump sum for several donations, the committee is required to give a receipt to the municipality for the lump sum only.

Marketing and Public Relations

As previously stated, the faster a fundraising program kicks in after a disaster, the greater the potential for success. This is due in part to the amount of unsolicited media coverage being concentrated on the disaster event. The duration and quality of such coverage is directly related to fundraising success. As soon as media coverage declines, the ability to raise money becomes more difficult and time consuming. Therefore, it is important to establish an early working arrangement with local media and ask for continuing coverage of fundraising related activities after the interest in news related to the disaster fades. This ongoing coverage should be considered as the media's sponsorship support for the community's fundraising efforts.

Local community-based media will be more willing to participate in fundraising support than provincial or national media. However, it is again important to make early contact to ensure maximum participation.

The Ontario Community Newspaper Association has indicated its encouragement for member newspapers to be supportive of ODRAP related fundraising activities (http://www.ocna.org/default.htm). Their support could include donated advertising space, reduced advertising rates, assistance with design and graphics for fundraising promotional materials, and promotional inserts including donation appeal envelopes.

How to Conduct Media Relations

Media relations is different from advertising - your objective is to gain editorial coverage for your cause. Editorial coverage includes news articles or photos in the paper, or stories you hear on the radio or TV that talk about or show your efforts to raise money, such as an article on a fundraising event or a photo of a cheque presentation. These types of editorial coverage and news stories are considered more credible than advertising. There is a process to media relations. Although it is not a complicated process, it is important to follow it.

Step 1: Develop a Media Relations Plan

To begin your media relations efforts, start with communications planning. Communications planning is a process that helps clarify who you are trying to reach, with what message, and why. By using this method, you can increase your chances of getting media exposure and increase the effectiveness of the messages you send out through the media.

A Media Relations Plan has three parts:

1. **A target audience.** Who are you trying to reach? (Donors, community leaders, and community organizations are examples.)
2. **A communications objective.** What is your purpose for accessing the media? (To share information, to offer opportunities for others to help, to communicate an event. You may have more than one objective.)
3. **A message to the media.** What are you trying to convey? (You need more support; you want people to come to your event. You must have a clear idea of what you are trying to share with the public.)

Step 2: Identify Your Media Options

In order to implement a media relations plan, your team needs to identify all media options available locally, provincially and sometimes nationally, depending on the size of the disaster. A media list may be obtained from the Communications Branch of the Ministry of Municipal Affairs and Housing via your Ministry's regional contact.

- **Media Directories.** There is a good chance that a media directory, listing all media options in your local community, is already available at your local library, at municipal offices, through the local newspaper office, or local radio station.
- **Use Your Knowledge & the Yellow Pages.** Use your committee's knowledge of media resources in your community and the yellow pages to list all media resources you have access to. Examples might include daily and weekly newspapers, radio stations, and TV stations.
- **Listing Contacts.** Call the media to find out who your contact would be, what opportunities are available for publicity, and what the requirements or guidelines are for publishing or interviewing. Typically your contact at a daily or weekly paper would be the editor, the assignment/city editor at a radio station, the news editor and assignment editor for TV. However, use existing contacts if you have already established relationships.

Step 3: Approach the Media

Different methods are typically used with different types of media because each outlet may have a different purpose for the material you are trying to present.

Follow these guidelines:

Look for the hook. Each media outlet has a different "hook." The media thinks in terms of broad application, so your committee must think of why the general public would care about what you have to say.
Give them what they want. Provide materials that are appropriate for the medium you want to use.

These include news releases, media advisories, interviews and photos.

- **News Releases (see sample below):**

  Headline. Your headline is the first thing an editor will read. You want to draw the editor in, using your headline as a "hook." Your headline should be informative and inviting, though never sensational or shocking.
  Date. Date your news releases for the day you plan to distribute them. News releases with last week's date on them could mistakenly be perceived as "old news".
  Lead. Your lead is the first sentence of your news release. Like the headline, your lead has to be both catchy and informative.
  Body. Your body paragraphs should answer the questions, What? Why? Who? When? Where? How? For instance, if your news release announces an upcoming event, the body of the release explains why this event is being organized, who's organizing it, and gives details on when and where.
  Contact information. Always include information on how to reach you with any questions - accessibility is crucial for a reporter to follow up. The most basic contact information should be a name and a phone number. You may also choose to include a second number, a fax number, an email address or a web page address.

- **Media Advisories.** An advisory is used to invite or advise media of an event such as a news conference, special event, or cheque presentation. It is a shorter, more concise form of a news release that answers the questions: What? Why? Who? When? Where? How? It is especially useful if a photo or TV appearance opportunity exists.

- **Interviews.** Interviews can be secured through radio, TV, or newspaper outlets. "Experts" recruited by your committee should be appointed to provide information and perspectives on the current issues and events.
- **Photos.** Photos with captions can be used to highlight and add emphasis to your news release, media advisory, or feature story. Newspapers will often run photos that tell a story or show an important event. Inspire yourself by looking at photos in the newspaper.

Check the Timing. Timing is everything. Editors and producers want information that is current, timely and relevant.

Step 4: Keep it Going

In order to make your relationship with the media successful, be helpful – give them information they can use, that meets their requirements, and is within their deadline. Help them do their job of getting information out to the community. Be a resource that media can call on when they need information. Give them names and phone numbers of individual "experts" on your committee and what their areas of expertise are.

Step 5: Give Thanks

Consider the media to be like any other donor when your campaign is wrapping up. Be sure to send a thank you letter to let them know how the coverage helped ensure the success of the committee in achieving its goals.

Sample News Release

Fundraising begins to help victims of disaster
Minister declares Taylor a disaster area

Release: date

Taylor - Municipal Affairs and Housing Minister (name) today declared the Town of Taylor a disaster area, making it eligible for funding under the **Ontario Disaster Relief Assistance Program (ODRAP)**.

On October 30th this year, raging waters of the Taylor River forced hundreds of residents to flee their homes, leaving behind thousands of dollars of damage.

ODRAP is a source of financial aid for losses of essential private property not covered by insurance, suffered by private homeowners, farmers, small businesses and non-profit organizations.

A volunteer committee has been appointed by the Town of Taylor to spearhead the local fundraising effort. The disaster relief committee has set a tentative fundraising target of $ amount to provide assistance to homeowners, farmers and small businesses whose essential property has been damaged in this (name the disaster). The province will contribute up to $2 for every local dollar raised to an amount necessary to settle all eligible claims.

Public donations will make a difference in the lives of those families affected by the Taylor River flood. Residents are urged to donate by calling 1-800-xxx-xxxx, or online at www.taylorriverdisaster.ca, or by visiting any branch of the bank in the Taylor River area. Donation of goods should be directed to (name the organizations such as Red Cross, Salvation Army, etc.)

Contacts:

Make It Easy To Give

The majority of funds raised will come from individuals wanting to help their friends, neighbours and fellow citizens by making a direct gift of money. Accordingly, mechanisms must be set up to enable this generosity an outlet.

Donation Drop-Off Points

The more locations available in the community for people to leave their donation, the more convenient it will be for people to give. Locations such as municipal offices, banks and retail outlets are ideal because of their experience in handling cash. They also provide a sense of confidence for donors that their gifts are secure and will be used appropriately. However, the larger the number of drop-off points, the more difficult and time consuming it will be to get the funds into the ODRAP bank account.

Most chartered banks are willing to assist with cash collection. Arrangements can be made through the Canadian Bankers Association to co-ordinate donation drop-off at a number of their member branches within a community. In the case of smaller disasters, arrangements are best made with local bank managers. Banks often issue temporary receipts for funds they receive on behalf of the DRC, but they are not eligible for tax purposes. Official receipts must be issued by the committee (please see section on "Issuing Receipts" in Chapter Five) when the funds are received from the bank.

Telephone Donations

More and more people feel comfortable making donations over the phone using a credit card. Early arrangements should be made to establish a "1-800" disaster help line. Arrangements will also have to be made with an organization with call centre capacity, such as a volunteer centre, or a retail operation familiar with processing orders. Bell Canada is willing to help with both and can do so in a timely manner. Bell also can establish a "1-900" service where people call a specific number and a predetermined donation amount ($25, $50, $100) is automatically added to the individual's regular phone bill. Bell then remits the amount to the DRC.

Arrangements can also be made with major credit card companies to reduce or eliminate the processing service fee charged on credit card donations.

Online Giving

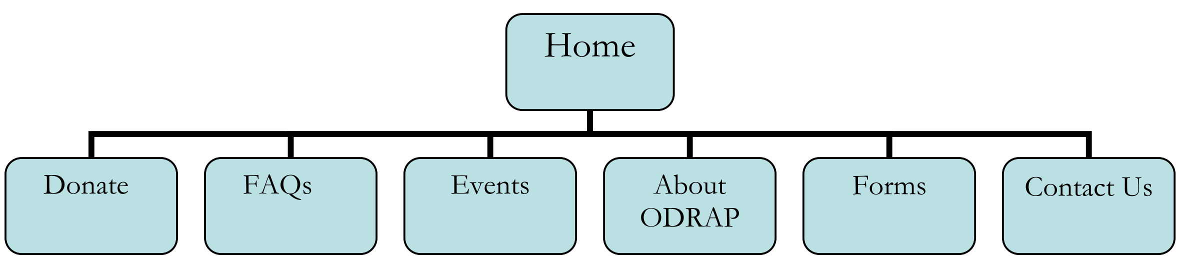
Similar to donations by phone, giving via the Internet is becoming very popular. Canadahelps.org facilitates online giving using electronic fund transfer (EFT) and electronic communication methods. Using EFT, all funds, minus the standard credit card transaction fee, are transferred directly to the charity's bank account. E-mail communication provides the charity with real-time reporting and notification of each donation made on the site. While www.canadahelps.org lists most charities, only those that register can use their services, download donation data, and update their profiles on the portal.

Website

Arrangements can be made with a web design company to design a secure "disaster website" to collect donations and provide news and information about the disaster, ODRAP and fundraising activities. Again, Bell Canada may be willing to help establish and operate such a service.

The following outlines the information architecture of a website developed for the purposes of a disaster relief effort. The general content is listed for each section.

Suggested Website Information Architecture



Suggested Website Content

Home	- Introduction - Essential information on the disaster - List of events
Donate	- Introduction to donation section outlining why the money is needed and where it will be used - List different methods of making a donation - Link to your site on www.canadahelps.org
FAQs	- Frequently asked questions and answers
Events	- List of fundraising events and, perhaps, pictures of past events
About ODRAP	- Essential information on the ODRAP program - Link to Ministry of Municipal Affairs and Housing website www.mah.gov.on.ca/userfiles/HTML/nts_1_3365_1.html
Forms	- Forms for downloading
Contact us	- Essential information to contact the committee, etc.

Donations by Mail

The majority of gifts will come through the mail. Therefore, it is essential that an appropriate official donation address be assigned as soon as possible. Return envelopes and pledge forms should be printed and made widely available through direct mail and newspaper insertion. It is not necessary to use a "postage paid" return envelope. Most donors are very willing to buy a stamp to ensure that as much of their donation as possible is being used to help others.

Information about all of these giving vehicles must be well-publicized early on in all disaster media releases and promotional vehicles used for fundraising.

Asking for Donations

Direct Response

Depending on the scale of the disaster and size of the geographicarea affected, direct response fundraising may be considered a useful tool. Direct response involves sending information about the fundraising appeal including "an ask for support" to people's homes or places of business. The information is usually sent by mail, through a commercial household distribution service, or as an insert in newspapers or other publications. It includes a method by which the individual can respond directly, such as a pledge card and return envelope, or a telephone number and website address where donations can be made by credit card.

Addressed Mail

The most effective form of direct mail involves personalized letters sent directly to individuals. This is also the most expensive form of direct mail, and takes time and effort to produce. However, there are many direct response firms that specialize in producing this type of material and can have a program up and running within a relatively short period of time. The Ministry of Municipal Affairs and Housing cannot recommend any individual direct response firm.

Several Ontario-based direct response firms include:

- Informco (www.informco.com)
- Stephen Thomas ((www.stephenthomas.ca)
- Blakely Epton & Associates (www.blakelyepton.com)
- A&L Mailing Services (www.directpost.com).

The names of other direct response companies can be found at www.charityvillage.ca.

Non-Addressed Mail

An inexpensive method that can be used to distribute a direct response device to every household is non-addressed or bulk mailings. This can be done as a "Dear Neighbour" letter distributed through Canada Post, or as an insert in a local community newspaper.

Experience shows that addressed mail outdraws non-addressed mail by five to one. Regardless of the delivery method, however, response rates should be appreciably higher for a natural disaster community appeal.

Sample Donation Letter

First & last name
Address
Location Prov PC

Salutation,

On October 30th this year, raging waters of the Taylor River forced hundreds of residents to flee their homes, leaving behind thousands of dollars worth of damage and resulting in the area being declared a disaster area by the provincial government. The devastating waters forced residents to temporary shelters with nothing more than the little they could carry with them. Now that the floodwaters are receding, some families are returning to their homes, only to find them in ruin. It is estimated that of the 150 homes damaged by the flood, over half are not fit to live in, with others requiring weeks of restoration. More than twenty local businesses cannot reopen without major renovation and restocking. Some may never reopen at all.

Flood victims are discovering that the suffering caused by a disaster can continue long after news of it disappears from the front pages of the newspapers. At a minimum, residents face the chore of cleaning up and repairing damage to their homes and businesses. For others, it will be far worse.

At the request of the Town of Taylor, the Ministry of Municipal Affairs and Housing, declared the region a “Disaster Area” for the purpose of the Ontario Disaster Relief Assistance Program. This provides an opportunity to help your neighbours devastated by the flood.

A volunteer committee has been set up to spearhead the local fundraising effort. A tentative fundraising target of $XXX has been set to provide assistance to homeowners, farmers and small businesses whose essential property has been damaged in this (name the disaster). A considerable community response is needed to help those less fortunate who have suffered such devastating losses.

Financial support from the community will be instrumental in attracting provincial financial assistance. For every local dollar raised, the province will contribute up to a ratio of 2:1.

You can help and your help will make a huge difference in assisting victims of the flood in regaining their homes, their businesses and their lives. Please make a donation today to the Taylor River Disaster Relief Campaign. Donations can be made at any (branch bank) location and via www.namesite.ca. Charitable receipts will be issued for cash, cheque and VISA/Mastercard donations of $10 or more. If you need additional information, contact (name,#, email).

Our community has vigorously supported many worthwhile causes in the past. The people touched by this disaster need your help now more than ever.

With our sincere thanks,

Name and title

Personal Visits

The most effective method of raising funds is through peer-to-peer solicitation. If you are asking an individual, a corporation or an organization for a substantial gift, you must make the solicitation in person. People respond to people asking for support more than any other form of fundraising. It is easy to ignore a letter or newspaper appeal. It is much more difficult to say no to someone you know and respect. If someone takes the time and effort to visit a donor, it signals the significance of the request for help and causes the donor to seriously think about the request.

In an ideal fundraising world, every donor would be solicited from personally. With a limited number of volunteer solicitors and a large number of prospects, however, a process known as prospect review would be helpful.

Prospect review is the confidential evaluation of prospective donors through thoughtful study, discussion and analysis. It should be undertaken by members of the Corporate, Community Organization and Individual Working Groups.

The role of prospect review is threefold: to qualify, evaluate and determine a pathway to each prospect.

The first task is to qualify each prospect, separating them from potential donors. A qualified prospect must have the financial capability to make a donation. He or she should have some rationale for giving to the cause – a philosophical rationale, if not active interest or involvement with the cause. Finally, the prospect should have some history of giving to other similar causes.

Evaluation, also called rating, is a dollar figure assigned which the committee hopes a prospect may be capable of giving, assuming that the prospect is interested in the case and motivated to give by the solicitor and campaign.

What you ask a particular prospect to give should be based on what he or she could give, if properly motivated and asked by the right solicitor. The key is what the prospect is capable of, not what you think they will do. When meeting with the prospect, the amount suggested in the request is referred to as a "think about" figure. It is a figure that is proportional to what others in similar financial circumstances are being asked to consider.

The final step in the review process is to determine the most appropriate pathway to the prospect. The ranking of a prospect is decreased if a clear path cannot be identified.

Prospect evaluation is a sensitive and time-consuming process, but an essential one. To summarize, the prospect review process:

- Identifies, qualifies and evaluates prospects
- Demonstrates that not every prospect will warrant a personal call; for some, a letter will suffice
- Provides a "think about" figure for each prospect
- Demonstrates that the appeal can be won, "on paper"
- Identifies prospect linkages and pathways
- Identifies new prospects through discussion
- Identifies the best solicitor and strategy to approach the prospect
- Raises the sights and ensures donations are proportionate to the goal
- Identifies lead donors who will be used to inspire others.

Special Events

Special events are the default method of raising funds for many organizations. Concerts, dances, picnics, garage sales, bake sales and the like are the tools that most think of when faced with having to raise funds within a community. While effective at involving people, special events are not the most cost efficient way to raise money. Special events consume large amounts of volunteer time and do not necessarily generate the amount of funds that could be raised using other techniques, as previously discussed. However, special events do raise public awareness for an appeal, build a sense of community participation and often inspire others to become involved in further fundraising activities.

The best kinds of special events are those that are conducted by other organizations on behalf of the Fundraising Subcommittee. In many cases, a special event is all some third-party organizations are willing to undertake or are capable of undertaking.

Service clubs, community groups, corporations, schools and other organizations often enjoy and reap other rewards from supporting local causes.

Every effort should be given to encourage and recruit third-party fundraising activity.

To avoid confusion and misunderstanding, the Fundraising Subcommittee must develop third-party activity policies and protocol. These should include:

- Timing and location of an event
- Participation of Fundraising Subcommittee members
- Accountability for funds
- Promotion
- Overlap with other organizations conducting similar events
- Recognition
- Acknowledgement and receipting of donations
- Responsibility for costs and other liabilities
- Insurance
- Ticket sales and cancellation policies.

Chapter Five: Administration

Financial Policies

It is essential that detailed policies be developed for the handling of donors and donations. Development of these policies, as previously mentioned, should be the responsibility of the Finance and Accountability, and Donation Processing working groups in conjunction with the Treasurer of the DRC. The following is an example of such policies. They are meant to be examples only. The DRC will have the ultimate authority to approve any policies proposed by the sub-committee.

Sample Financial Policies and Guidelines

The following financial policies have been developed for this campaign:

- All gifts are unconditional and for use as designated by the DRC and cannot be earmarked for a specific project or geographic area.
- The campaign will accept all financial gifts. Only financial gifts will be eligible for matching funds from the Ontario Disaster Relief Assistance Program.
- In-kind donations will be directed to other agencies and organizations that are able to receive and distribute such donations, such as the Salvation Army and local food banks.
- The FSC is authorized to accept gifts from any source, provided there are no conditions attached that run counter to the policies and values of the DRC, municipality or Ministry of Municipal Affairs and Housing.
- Pledges containing unusual features will be submitted to the Finance and Accountability Working Group to make recommendations to the FSC for their approval.

Issuing Receipts

In order for donors to seek tax relief as a result of making a donation to the campaign, an official receipt must be issued by an incorporated municipality or registered charity. These include the DRC (when it registers with Canada Revenue Agency (CRA), see below for details), and collection agencies or organizations as previously mentioned. In some cases, depending upon the size of the disaster and the number of municipalities involved, the easiest way to issue receipts is to enter into an agreement with the involved municipality or municipalities. This eliminates the need to apply to CRA for a charitable number, which can take several weeks or months. It also accelerates the process of issuing receipts.

Since most municipalities do not have the staff or facilities to handle many donations, the municipality may have to arrange for additional staff. These administrative costs of the DRC will be paid by, or provided for directly by the municipality or designated municipalities, or cost-shared between the province and the municipality.

Official receipts should be issued in triplicate. The original copy is the donor's copy; the second copy should be filed in alphabetical order; and the third copy should be filed in numerical order as an audit trail.

Receipt numbers for each contribution should be recorded on the daily deposit listings, even when the receipts are prepared some time after deposit. The daily deposit listings should include complete names, addresses, postal codes, and amounts. Allow space for later recording of the receipt numbers.

Process for the DRC to register with CRA

Organizations established to provide financial and material relief to the victims of natural disasters or sudden catastrophes (e.g. floods, ice storm) can qualify for registration as a charity under the following category of charitable purposes – other purposes beneficial to the community in a way the law regards as charitable.

Information on the definition and class can be found at http://www.ccra-adrc.gc.ca/tax/charities/policy/csp/csp-d13-e.html

Information on registering as a charity can be found under the Charities section on the CRA website. The website provides a step-by-step process and provides all forms, guidelines and information required. See: Registering a Charity for Income Tax Purposes, T4063 or http://www.ccra-adrc.gc.ca/E/pub/tg/t4063/README.html

The CRA process for applying for a charitable status can take several weeks or months. It is recommended that the application be sent with a cover letter indicating "Priority: Disaster relief request" and be faxed to (613) 952-6020.

Alternatively, and as discussed in the preceding page, the Fundraising Subcommittee would make an arrangement with the municipality for the issuance of official tax receipts, as municipalities are defined as qualified donees under the *Income Tax Act*, and have the ability to issue official tax receipts.

CRA Policy for Issuing Official Donation Receipts

Contents

The information below is taken directly from CRA site http://www.ccra-adrc.gc.ca/E/pub/tp/it110r3/it110r3-e.html#P199_22325

A charity may issue official receipts only while it is registered and must not issue receipts for funds that it will not itself be responsible for spending. Part XXXV of the Regulations requires that each official receipt that a charity issues to acknowledge a donation must contain at least the following:

- A statement that it is an official receipt for income tax purposes
- The charity's registration number, name and address in Canada as recorded with Canada Revenue Agency, Charities Division
- The place or locality where the receipt was issued
- The day on which or the year during which the donation was received or, where property other than cash is received, the actual date of receipt
- The day on which the receipt was issued when it differs from the date of the donation
- Amount of the gift
- The name and address of the donor.

Each such receipt must be prepared at least in duplicate (though triplicate is recommended. Charities are required to keep on file a copy of every official receipt issued; an extra copy could be kept for audit purposes.), signed by an authorized person, and bear its own serial number. In addition, where the donation is a gift of property other than cash, the fair market value of the property at the time the gift was made, as well as the date of the gift, a description of the property, and the name and address of the appraiser (if any) of the property, is required. For further information consult the current version of IT-297, *Gifts in Kind to Charity and Others*.

Some charities issue an extra copy of the official receipt or issue a temporary receipt. Where this is done, the extra copy or temporary receipt is not to include the registration number of the charity and must contain a notation to the effect that "this copy is for your information only and is not an official receipt for income tax purposes."

Control of Receipts

Charities are expected to guard against the unauthorized use of official receipts. Most charities arrange through a printer for a supply of blank, serially-numbered receipts to be on hand at any given time. The charity must control the use of its receipts and, in the event of lost or stolen receipts, should notify Canada Revenue Agency, Charities Division, at the address noted below. It may be necessary in such circumstances to cancel the registration number and obtain a new one from the Department.

Charities Division
Canada Revenue Agency
5th floor
400 Cumberland Street
Ottawa ON K1A 0L5

Facsimile Signatures

The use of a facsimile signature is permitted under the following conditions:

- The receipts are distinctively imprinted (usually by a commercial printer) with the name, address, and registration number of the charity.
- The receipts are serially numbered by a printing press or numbering machine.
- All unused receipt forms are kept at the charity's Canadian addresses.

The requirements with respect to the contents of official receipts as discussed above are applicable whether or not a facsimile signature is used.

Lost or Spoiled Receipts

To replace a lost official receipt, a charity may issue a replacement which must contain all required information (see Contents Section in the preceding page) plus a notation to the effect that "this cancels and replaces receipt # (insert the serial number of the lost receipt)." The charity's copy of the lost receipt must be retained and marked "cancelled". In the case of a spoiled receipt, all copies must be retained and marked "cancelled," and another receipt may then be issued.

Date of Issue/Date of Donation

The "date of issue" is the date on which the receipt was prepared. There are no regulations requiring the issuance of official donation receipts within a particular time frame, but it is suggested that they be issued at least by the last day of February following the year during which the gift was made. The more important date is the date of the donation. Gifts received after the end of the year may not be added to the previous year's donations unless the gift was postmarked in the previous year.

Computer Generated Receipts

Computer-generated official donation receipts are acceptable provided these are legible and the integrity of the computer data entries is sufficiently guaranteed. Such guarantees include the circumstances under which the data are entered, stored and protected against alteration. Protection against unauthorized access is a key security precaution.

Sample Donation Receipt

Official Receipt for Income Tax Purposes

No. 0001

(name) Disaster Relief Fund
Address
Date

The sum of ____ **dollars**

Received from: ____

$______________
Amount Received

We acknowledge your donation to the (name) Disaster Relief Fund
Income Tax Registration Number xxxxxxxxxxxxxxxxxxxxxxx

Per ______________________
Treasurer

Official Receipt for Income Tax Purposes

No. 0002

(name) Disaster Relief Fund
Address
Date

The sum of ____ **dollars**

Received from: ____

$______________
Amount Received

We acknowledge your donation to the (name) Disaster Relief Fund
Income Tax Registration Number xxxxxxxxxxxxxxxxxxxxxxx

Per ______________________
Treasurer

Saying Thank You

It is only polite to thank someone for making a gift. But it is also important to build momentum for the campaign, and to maintain an atmosphere of transparency for the campaign. Donors who are thanked in a prompt fashion tell others about the positive way they were treated and are sometimes inclined to make another gift or encourage others to do so. There will also be fewer questions about how money is handled in the campaign.

The following is a sample donor acknowledgement policy.

Donor Acknowledgement Policy

Gifts and pledges will be acknowledged in the following manner:

1. When a commitment is officially received by the Finance and Accountability Working Group or designate, acknowledgement will be mailed to the donor within a two-week period.
2. The Donation Processing Working Group is responsible for all data entry and issuing thank you letters and receipts for income tax purposes.
3. Upon the FSC receiving a gift or pledge payment, the donor will receive a tax receipt accompanied by a thank you letter from the FSC Chair.
4. Upon the FSC receiving a pledge, the donor will receive a letter from the FSC Chair confirming the details of the pledge as outlined by the donor.
5. Upon the FSC receiving a pledge with payment, the donor will receive a tax receipt accompanied by a letter from the FSC Chair confirming the details of the pledge as outlined by the donor.

- A letter of appreciation will be sent to all significant donors by the Chair of the DRC or designate.
- The key volunteer in the solicitation of a significant gift will be encouraged to send a thank you letter to the donor on his or her personal/corporate letterhead.
- All gifts will be recorded on the campaign database.
- Regular financial reports on all levels of giving and campaign totals will be produced by the Finance and Accountability Working Group and be made available to the FSC.

Sample Thank You Letter

Name
Title
Address
Address

Thank you for your generous support of the Taylor River Relief Effort. Your pledge of financial support for the residents of Taylor River affected by this tragic disaster is greatly needed and for that we thank you.

Your heartfelt investment in our community helped many families recover from the disaster. Your generosity helped the Taylor River Disaster Relief Committee raise a total of $________. For every dollar raised, the province will contribute up to $2.00.

The victims of Taylor River were overwhelmed by the outpouring of generosity by the community and local organizations. Through your generosity, we were able to help x families and individuals receive assistance for those basic recovery needs not covered by insurance or other agencies.

Once again, thank you for supporting the spirit of our community.

If you have not already received a receipt for your donation of $10 or more, please contact Taylor River Disaster Relief Committee.

With our sincere thanks,

Name and title

Record Keeping

Once again, for transparency and accountability, accurate records of all financial transactions must be maintained by the Finance and Accountability and Donation Processing Working Groups, in conjunction with the DRC Treasurer. In order to comply with acknowledgement policies, such as the one suggested above, all donations must be recorded in a central database.

The committee may contract with the municipality for data entry services and the ability to use an existing database used by the municipality. This could be beneficial if the municipality will also be issuing the official tax receipts. Otherwise, volunteers and paid staff will have to be engaged for the process. For security and continuity purposes, it is recommended that all work be supervised by paid, bondable staff. Costs related to donation processing will be paid by, or provided for directly by the municipality or designated municipalities, or cost-shared between the province and the municipality.

Depending on the number of anticipated donations, a simple database using Microsoft Access may be suitable, or specific fundraising software may have to be purchased. Some of the most popular fundraising software packages available in Canada are:

- ETapestry.com Inc. (eTapestry.com)
- Blackbaud Inc. (Raiser's Edge)
- Campagne Associates (GiftMaker Pro)
- FEOM Holdings Inc. (EZ-Fund)
- Income Manager (Income Manager2000)
- JSI FundRaising Systems Inc. (JSI Paradigm)
- KTS Systems Group (giftTRAQ)
- SofTrek (PledgeMaker)
- Advanced Solutions International Inc. (iMIS Fund Raising).

Getting Help

Establishing a major fundraising program in a few days may seem overwhelming to many. However, the emotion and energy created by a community devastated by a natural disaster inspire people to accomplish tasks with speed and enthusiasm that would normally seem daunting.

Nevertheless, much has to be accomplished and those involved in the early days of a disaster will face a steep learning curve. There are many professional fundraising consultants across Ontario with the skills and experience to guide the Fundraising Subcommittee through the planning and implementation stages of a fundraising campaign. Members of the FSC are encouraged to see what fundraising consulting services may be available in their community. The best listing of such services is available online from Charity Village (www.charityvillage.ca).