



# fundraising toolkit



OTTAWA  
COMMUNITY  
FOUNDATION

[www.ocf-fco.ca](http://www.ocf-fco.ca)



# grow your fund grow your impact

When you set up a charitable fund at the Ottawa Community Foundation, you leverage a powerful giving platform that has prioritized solid governance, astute financial stewardship, personalized donor engagement, and deep community knowledge for over three decades. We support your philanthropic journey and want to enable the success of your fund and ensure its longevity.

We know that, for many fundholders, being actively involved in the growth of their fund can be a rewarding and fulfilling experience. Fundraising can engage previous and new donors to support your fund and the causes you care about.

We hope the information in this kit is helpful as you think about planning your fundraising event or activity. In addition to all the tools and assistance we provide to make the process easy, there are also important guidelines to consider before proceeding. As always, we're happy to help if you have any questions.

## Before you start

Any fundraising event and use of the Ottawa Community Foundation name or brand asset such as our logo must be pre-approved.

## What does fundraising at the OCF mean?

Many charitable organizations carry out fundraising activities to support their work. They are generally run by the organization or by third-party supporters (individuals, families, or corporations).

As a fundholder at the OCF, you can organize similar activities to engage donors to support your fund. Here are some examples:



Direct Mail



Peer-to-Peer Campaigns



Publications and Websites



Special Events



Personal Solicitation



Canvassing

- » Telemarketing
- » Corporate Support
- » Planned Giving Campaigns
- » Major Gift/Endowment Campaigns
- » Text giving options

*All funds within the Ottawa Community Foundation (OCF) support the charitable activities of qualified donees (as defined under the Income Tax Act) whose purposes are consistent with the objects of the OCF. The OCF retains final authority regarding all disbursements and management related to the Fund.*

# how we can help

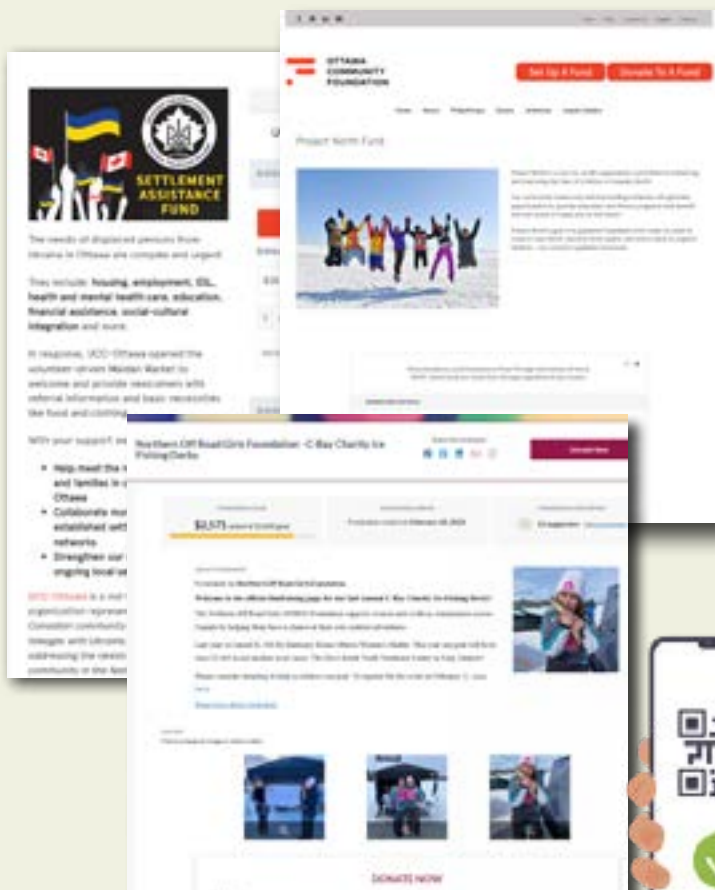
As you engage your current and potential donors, we want to equip you with the information and tools you need for a successful fundraising campaign or event by:

Helping you work with your donors and their professional advisors to structure planned and major gifts to maximize tax and other benefits.

Assisting your donor engagement with up-to-date lists of donations throughout your campaign so you can track progress and thank donors.

Amplifying the promotion of your fundraising activities through our channels if sufficient lead time is provided.

Collaborating with your team for knowledge sharing and capacity-building to better serve your donors.



## Your personalized fund page

Take advantage of our online donation platform to make it easy for donors to support your fund. Powered by [CanadaHelps](#), it allows us to create personalized fundraising pages that you can share during your campaign or event. There are a variety of options available, and you can choose to customize them with photos, logos, and a description or call-to-action.



- Build a loyal donor base by offering monthly giving options
- Generate a QR Code that links to your page for simple, easy transactions!

# receiving donations

One of the benefits of fundraising through your fund at the Ottawa Community Foundation is that it can accept a variety of donations. Letting your supporters know the options they have and the tax advantages offered is a great way to maximize the results of your campaign.



## Cheque, Money Order, Bank Draft

Must be made payable to the "Ottawa Community Foundation". The fund name should be noted on the memo line.



## Publicly Listed Stocks / Securities

Eliminate capital gains taxes and receive a tax receipt for the market value of gifted assets.



## Bequest

Supporters can designate all or part of their estate to your fund. Simple revisions to a will make it easy to implement.



## Life Insurance

Supporters can name the OCF and your fund as owner and/or beneficiary of a life insurance policy.



## RRSP/RRIF/TFSA

Supporters can name the OCF and your fund as the beneficiary a Registered Retirement Savings Plan, Registered Retirement Income Fund or Tax Free Savings Account.



## Gifts of Property

Under certain conditions, the OCF may receive gifts of real estate, corporation shares, and residuary interests in trusts.



## United Way Workplace Campaign

Supporters can give to your fund through a United Way Workplace Campaign. They must choose the Ottawa Community Foundation as the charity, and indicate your specific fund.



## Other Donation Platforms

As a registered charity, we can accept the proceeds of donations made on other platforms such as Benevity or Race Roster.



Your fund can accept many types of donations. **The one exception is annuities.**

In Canada, public foundations are unable to incur such debt obligations.

# tax receipts

Receiving an official donation receipt can be an important incentive for donors when they're asked to give. To abide by the guidelines set by the Canada Revenue Agency, it's important to confirm what is and is not eligible for a receipt.

## Some examples of gifts that are generally not eligible for an official donation receipt



### Gifts of Services

Donated time or labour



### Pledges

Promises to give are not eligible



### Sponsorship

Gifts in exchange for advertising or sponsorship



### Gift Certificates

Gift certificates donated by the issuer



### Admission Fees

Fees paid to attend an event



Click on the flag to view CRA's official guidance on this topic.


Learn more about eligible gifts on CRA's website 



The true donor is the person or organization that a registered charity can issue an official donation receipt to. In some cases, it can be tricky to determine who that is. The CRA has provided information and examples to clarify this.

Click the image to learn more.

## Other Resources

-  The CRA's guidance on issuing receipts for fundraising events, including auctions, dinners, and golf tournaments
-  CRA's video overview on gifting and receipting rules (12min)
-  The Ottawa Community Foundation's policy on donor-initiated fundraising

# get in touch

**If you are thinking of organizing a fundraiser or other fundraising event, contact us early in your planning.**

## About the Ottawa Community Foundation

The Ottawa Community Foundation is a charity for charities. It leverages philanthropic resources to strengthen and empower the charitable sector in the National Capital Region and beyond.

We create positive, systemic, and sustainable impact with engaged philanthropy, strategic granting, social infrastructure building, and community leadership.

As an efficient, inclusive, and diverse giving platform, we support all charitable causes by helping philanthropic-minded citizens craft their legacies and make the community a better place for all.

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