

Fundraising Activities Checklist

Are you planning a fundraising event? Developing a fundraising plan? Completing this checklist will help you to be more accountable in your fundraising activities.

- Do you (the board or management) have direct control over the fundraising activity, whether staff, a contractor, or volunteers organize it?
- Does the person who is preparing and/or delivering the information about the organization have an understanding of the organization's mission and program activities?
- Do you have a way of ensuring that the information used in the fundraising activity is accurate?
- Have you complied with provincial rules for conducting fundraising activities?
For example, in Alberta, a charitable organization planning
 - to conduct fundraising activities to generate more than \$25,000 in a year
or
 - to use the service of a fundraising business has to register under the *Charitable Fund-raising Act*.

Note: For more information, go to

www.servicealberta.gov.ab.ca/pdf/tipsheets/Charitable_Fund-raising.pdf

- Is there a budget for the event?
- Is the person organizing the fundraising activity being paid?
 - If yes, has the fair market value of his salary been determined?
- Is the person organizing the fundraising activity being paid based on results, that is, a commission?
 - If yes, will you be able to ensure that the staff or third party contractor will NOT be getting a disproportionate amount of benefits?

Note: Paying a fundraiser based on results is generally discouraged.

- In the case of hiring a third-party contractor, did you check out other contractors and compare prices?
- If the donors will be receiving benefits (advantages), have you determined the amount that a tax receipt will be issued for? (applicable to registered charities only)
Note: The fair market value of the advantage has to be determined.
- Is the amount of the tax receipt stated in the fundraising promotional materials? (applicable to registered charities only)
- Is the projected fundraising cost-to-revenue ratio less than 35 per cent? (applicable to registered charities only)
Note: The CRA Fundraising Guidance states that 35 per cent is generally acceptable and unlikely to generate concerns. See www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/fundraising-registered-charities-guidance.html for more information on the Guidance.
- Will you be able to separate fundraising expenses from other expenses, such as charitable or administrative expenses? (applicable to registered charities only)
Note: Fundraising expenses have to be reported separately from other expense in the annual T3010 submitted to the CRA.
- Will records be kept of the discussions and decisions relating to the fundraising event?
- Has time been set aside after the event to debrief for future planning?