

Engaging Others in Fund Growth

Since 1955, Calgary Foundation has nurtured a healthy, vibrant, giving and caring community and we've done it with thousands of people who proudly joined our journey. It takes visionary philanthropists and engaged citizens, rallying around important issues, to help us build a thriving community.

While Calgary Foundation inspires philanthropy, we do not engage in fundraising. However, we offer guidance to Fund Advisors who choose to fundraise, ensuring that any activities remain compliant with Canada Revenue Agency (CRA) regulations.

Most Funds at Calgary Foundation can receive gifts from others. Some Fund Advisors have engaged others in building up a Fund through recognition of someone's life (memorials), anniversaries, milestones, holidays, and more.

This document outlines considerations, tools, resources, and examples to provide guidance in engaging others in the growth of a Calgary Foundation Fund.

Tools and Resources

- [CanadaHelps](#)
 - Calgary Foundation utilizes CanadaHelps' secure online giving platform.
 - Unique CanadaHelps donation links can be created for specific Funds.
 - QR code images can be provided for print materials.
 - A unique campaign page can be created that highlights gift giving around a particular time-bound event, such as a birthday or anniversary.
 - Without a direct link, gifts can be made online [here](#). Donors can search and select the Fund name from the drop-down menu.
 - An example of a unique donation link can be seen [here](#).
 - Online donations to Calgary Foundation Funds are processed through CanadaHelps, who directly emails donors an electronic tax receipt.

- [DonorCentral](#)
 - A secure online Fund management tool for Calgary Foundation Fund Advisors to view Fund balances, recent gifts, Fund history, and more. If a Fund Advisor does not yet have access to DonorCentral, please email your Fund Steward or reach out to donorgrants@calgaryfoundation.org.

- [Third Party Fundraising Guide](#)
 - A Calgary Foundation Third Party Event is a fundraising event in support of a Fund at Calgary Foundation. This link contains all the necessary documents and forms required to proceed with a fundraising event, so please review it early in your planning.

Communicating about the Fund

Please address and recognize the Fund as “Name of Fund at Calgary Foundation” or “Name of Fund administered by the Calgary Foundation” where possible in any written instances, or as appropriate during an event.

The Calgary Foundation logo can be utilized within recognition and brand guidelines. To learn more, please visit our [Media Kit](#) webpage. We ask that a copy of any publication or signage that features the Calgary Foundation logo is sent to Calgary Foundation’s Communications Department for approval PRIOR to publication.

Share with contributors when and **why** the Fund was established, as well as **what the general goal of the Fund is**. In broad terms, describe the causes and initiatives that the Fund may support through raised dollars, noting that grants will be made at the recommendation of the Fund’s Advisor(s).

Sample language to consider using depending on the type of Fund you are promoting:

Endowed Fund:

- “The Name of Fund is an endowed Fund held in perpetuity and administered by the Calgary Foundation. A percentage of the Fund’s value will be distributed annually, at the recommendation of the Fund’s Advisor(s), in support of THESE CAUSES (for example: animal welfare, youth at risk, cancer research and supports for those in treatment). Gifts contributed will help build the Fund balance and will annually support charities working in these areas, making an impact today, and forever.”
- “The Name of Fund at Calgary Foundation endeavors to support charities and initiatives that inspire, recognize and assist mentors and community-minded people to do their community building, just as INDIVIDUAL’S NAME inspired us all to do. Gifts contributed to this Fund will be endowed in perpetuity and a percentage of the Fund’s value will be distributed annually, at the recommendation of the Fund’s Advisor(s), in support of these causes.”
- “Your gift will help grow the memorial endowment Name of Fund at Calgary Foundation that, at the recommendation of the Fund’s Advisor(s), will support EDUCATIONAL OPPORTUNITIES IN INTEREST AREA. Thank you for being part of an ongoing tribute to the life and work of INDIVIDUAL’S NAME. Through this Fund, we will continue INDIVIDUAL’S NAME’s legacy of compassion, community involvement, and purpose.”

Flow Through Fund:

- “The Name of Fund is administered by the Calgary Foundation. At the recommendation of the Fund’s Advisor(s), grants will be made to registered Canadian charities to support the following CAUSES/INTERESTS/ISSUE AREAS (for example: supports for newcomers, arts programming, literacy). Your contribution will help us build the Fund balance and will support charities working in these areas.”
- “In honour of our organization’s 25th anniversary, the Name of Fund at Calgary Foundation has been established to honour our community’s commitment to education. Gifts made to the Fund will be utilized, at the recommendation of the Fund’s Advisor(s), to support educational initiatives and student awards through grants to local charities.”

Additional sample language to include:

- “Tax deductible gifts to the Name of Fund at Calgary Foundation are graciously accepted; donate online here: [include QR code or link, for example <https://www.canadahelps.org/en/dn/23770>.] Donations to the Name of Fund at Calgary Foundation are processed by CanadaHelps with an electronic tax receipt provided via email directly from CanadaHelps.”
- Or “Gifts may be made to the Name of Fund at Calgary Foundation online at [specific donation link] or cheque by mail to 1180 – 105 12 Avenue SE Calgary, AB T2G 1A1, noting Name of Fund in the memo line of the cheque.”

Donations

- Donations made to the Fund support the broad established purpose of the Fund, and often, the Fund Advisor(s) recommend when and to which registered charity grants are disbursed.
- **What kind of donations can a Fund accept?** Donations can be made via credit card, cash, cheque, wire transfer, or EFT. Donations of publicly listed securities can also be accepted.
- **How can someone donate online?** A unique donation link to a Fund’s dedicated donation page on Calgary Foundation’s [CanadaHelps](#) platform may be created upon discussion with your Fund Steward, and shared with others to contribute online directly to the Fund.
- **How can someone donate by cheque?** Cheques must be made payable TO: Calgary Foundation, indicating in the MEMO: “Name of Fund” and mailed or delivered to 1180 – 105 12 Avenue SE Calgary, AB T2G 1A1. Please ensure the cheque is accompanied by a note or cover letter expressing the donor’s preference for anonymity and includes the donor’s telephone number and/or e-mail address.
- **Do donors receive tax receipts?** Charitable tax receipts are issued for eligible donations. Donations made online are processed by CanadaHelps and an electronic tax receipt is emailed to the donor directly from CanadaHelps for the full amount of the donation. Donations made by cheque will receive a tax receipt in the mail directly from Calgary Foundation.

- **Is there a donation fee?** To read more about Calgary Foundation's cost recovery structure, please visit our [website](#).
- **Who can donors contact with questions about giving?** Please reach out to your Fund Steward or the Calgary Foundation team at donations@calgaryfoundation.org.

Donor Gratitude, Recognition and Anonymity

When gifts are made to a Fund, a note of gratitude from Calgary Foundation accompanies the charitable tax receipt provided to the donor.

You may wish to directly thank Fund contributors over time for their support and/or provide an update on the impact of the Fund. These forms of donor stewardship often result in continued support. Contact your Fund Steward for more information regarding opportunities to send a general gratitude message to your donor community.

On [DonorCentral](#), Fund Advisors can view donor names and gifts to the Fund, for contributors who agree to share their name and donation amount with the Fund's Advisor(s). Please note that DonorCentral records are updated within 14 to 21 business days from the date of a gift.

Emphasize to your audience that donors must agree (opt in) to share their name and donation amount with the Fund's Advisor(s) when donating online if they wish to be known and recognized. For cheque donations, a note or cover letter must accompany the cheque indicating the donor's preference regarding name disclosure to the Fund Advisor(s). If no preference is provided, the donation will be treated as anonymous by default.

This way, when Fund Advisor(s) seek to directly communicate their gratitude for a gift, they are able to view donor names in DonorCentral. Without this, Calgary Foundation is unable to share donor names as the privacy of all our donors is protected in accordance with applicable legislation. Calgary Foundation will never disclose donor contact information.

When donating through CanadaHelps, contributors to the Fund may choose to send an e-card directly to the Fund's Advisor(s).

Sponsorship and Grant Applications

Canada Revenue Agency (CRA) considers sponsorship to be outside the parameters of charitable giving, as there is a personal or corporate benefit received by one party. Therefore, any person or entity may not derive any material advantages or sponsorship benefits from the gift. For more details, please visit [Sponsorship - Canada.ca](http://Sponsorship-Canada.ca).

Calgary Foundation Funds cannot apply for charitable grants from other organizations or for Alberta Gaming, Liquor and Cannabis (AGLC) charitable gaming proceeds (e.g., casino events, raffles, lotteries and bingos, etc.).

Additional Ways to Give

- **Matching Contributions** - many companies offer employee giving programs, and Calgary Foundation can accept gifts to Funds provided through a corporate matching contribution.
- **Bequests** - Endowed Funds at Calgary Foundation can receive gifts by bequest. For more information, and sample bequest language, please contact your Fund Steward or our team at donations@calgaryfoundation.org.

Example of sample language to inspire gifts to a Fund:

Example Fund at Calgary Foundation endeavors to support charities and initiatives that support children's cancer care initiatives and research, in memory of **Jane Doe**. By establishing this Fund, we honour Jane's journey and how deeply she cared about research initiatives in this field.

Gifts contributed to this Fund will be endowed in perpetuity and a percentage of the Fund's value will be distributed annually, at the recommendation of the Fund's Advisor(s), in support of **these causes**. Thank you for being part of an ongoing tribute to the life of Jane Doe.

Tax deductible gifts to the **Example Fund** at Calgary Foundation are graciously accepted. To donate online, please click [here](#). Donations to the **Example Fund** at Calgary Foundation are processed by CanadaHelps with an electronic tax receipt provided via email directly from CanadaHelps.

To make a gift by cheque, please make payable to Calgary Foundation with **Example Fund** in the memo line and mail to 1180 – 105 12 Avenue SE Calgary, AB T2G 1A1. Please ensure a note accompanies the cheque indicating the donor's preference for anonymity (known or anonymous) and includes a telephone number and/or e-mail address.

Questions?

For more information, please reach out to your Fund Steward or our team at donations@calgaryfoundation.org.