

THIRD PARTY EVENT GUIDE
Canadian Mental Health Association
Windsor-Essex County Branch



**Canadian Mental
Health Association**
Windsor-Essex County
Empowering transitions to wellness.

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INTRODUCTION

You can make a difference and change lives!

Organizing a special event in support of the Canadian Mental Health Association, Windsor-Essex County Branch (CMHA-WECEB) is a great way to do something fun while also achieving your philanthropic goals, building community spirit and raising awareness about mental health.

Who is affected by mental illness?

- Mental illness indirectly affects all Canadians at some time in their lives, whether through a family member, friend or colleague
- 20% of Canadians will personally experience a mental illness in their lifetime
- Mental illness affects people of all ages, educational and income levels, and cultures
- Approximately 8% of adults will experience major depression at some time in their lives
- About 1% of Canadians will experience bipolar disorder (or “manic depression”)

How common is it?

- Schizophrenia affects 1% of the Canadian population
- Anxiety disorders affect 5% of the household population, causing mild to severe impairment
- Suicide accounts for 24% of all deaths among 15-24 year olds and 16% among 25-44 year olds
- Suicide is one of the leading causes of death in both men and women from adolescence to middle age
- The mortality rate due to suicide among men is four times the rate among women

What causes it?

- A complex interplay of genetic, biological, personality and environmental factors cause mental illnesses
- Almost one half (49%) of those who feel they have suffered from depression or anxiety have never gone to see a doctor about this problem
- Stigma or discrimination attached to mental illnesses presents a serious barrier, not only to diagnosis and treatment but also to acceptance in the community
- Mental illnesses can be treated effectively

What is the economic cost?

- The economic cost of mental illnesses in Canada for the health care system was estimated to be at least \$7.9 billion in 1998 – \$4.7 billion in care, and \$3.2 billion in disability and early death
- An additional \$6.3 billion was spent on uninsured mental health services and time off work for depression and distress that was not treated by the health care system
- In 1999, 3.8% of all admissions in general hospitals (1.5 million hospital days) were due to anxiety disorders, bipolar disorders, schizophrenia, major depression, personality disorders, eating disorders and suicidal behavior

Source: The Report on Mental Illness in Canada, October 2002. EBIC 1998 (Health Canada 2002), Stephens et al., 2001

How does it impact youth?

- It is estimated that 10-20% of Canadian youth are affected by a mental illness or disorder – the single most disabling group of disorders worldwide
- Today, approx. 5% of male youth and 12% of female youth, age 12 to 19, have experienced a major depressive episode

- The total number of 12-19 year olds in Canada at risk for developing depression is a staggering 3.2 million
- Once depression is recognized, help can make a difference for 80% of people who are affected, allowing them to get back to their regular activities
- Mental illness is increasingly threatening the lives of our children; with Canada's youth suicide rate the third highest in the industrialized world
- Suicide is among the leading causes of death in 15-24 year old Canadians, second only to accidents; 4,000 people die prematurely each year by suicide
- Schizophrenia is youth's greatest disabler as it strikes most often in the 16 to 30 year age group, affecting an estimated one person in 100
- Surpassed only by injuries, mental disorders in youth are ranked as the second highest hospital care expenditure in Canada
- In Canada, only 1 out of 5 children who need mental health services receives them

Source: <http://www.cmha.ca/media/fast-facts-about-mental-illness/>

About CMHA-WECB

The CMHA-WECB has been a part of the health care delivery system of this community for over 40 years. Since 1971, the local branch has been committed to the provision of mental health services.

CMHA-WECB provides over 20 programs and services in the community. These range from bereavement, concurrent disorders, intensive case management, counselling and treatment, early intervention, employment support, housing, information and referral and suicide education programs. CMHA-WECB is unique in that we have a City Centre Health Care centre located onsite to provide primary care. We also work closely with several community partners including Hotel-Dieu Grace Healthcare, Windsor Regional Hospital, Hospice, the City of Windsor and Family Services Windsor-Essex to ensure that there is a continuum of services for individuals in need.

What will your fundraising accomplish?

Several of the vital programs provided by CMHA-WECB receive little-to-no government funding. Community support is essential to these programs and the clients we serve.

Bereavement Program

Dealing with the death of a loved one can be one of the most traumatic experiences of a lifetime.

CMHA-WECB has a specialized Bereavement Program for adults and children (*Griefworks*) to assist them in dealing with grief. Over 600 adults and children use this program on an annual basis.

Client Assistance Fund

The Client Assistance Fund is available to clients to provide some short-term support for those in need. Up to \$250 per client per year is available to use on basic necessities like food vouchers, bus tickets, cab fare, etc.

Mental Health Education & Awareness

With 20% of the population dealing with a mental illness, mental health education is extremely important.

Education and training is available to workplaces, schools and community agencies to provide information and alleviate the stigma.

Step-by-Step Guide

We hope that this Third Party Event Guide will assist you in your event planning. Here are some key steps to guide you through the process:

1. Contact Us

CMHA-WECB staff are here to help you with your ideas and provide you with information and support in planning your event. Please contact:

Kim Willis
Senior Manager, Fund Development
& Community Engagement
P 519-255-9440 x161
kwillis@cmha-wecb.on.ca

Kerri Hill
Fund Development Officer
P 519-255-7440 x197
khill@cmha-wecb.on.ca

2. Event Ideas

The sky is limit! But here is a list of tried and true ideas that have worked in the past:

- “thons” - walk, bike, read
- fashion show
- potluck lunch
- tournaments (euchre, basketball, soccer)
- lemonade stands
- craft show
- garage sale
- golf tournament
- jean day at the office
- gala
- bake sale
- pasta dinner
- car wash
- fitness challenge
- trivia night

Look for other great ideas online. Ask us about setting up your own fundraising page online!

3. Getting Organized

Events take a lot of time and the efforts of many people. Put together an eager and enthusiastic committee to help accomplish your goals. Ensure there is a variety of skill sets and experience on your team.

4. Setting the Date & Picking a Venue

Schedule your event far enough in advance that you have time to organize and promote it. Research local community calendars to see what other events might also be taking place that day. Ensure that the venue you select is accessible, has parking, and has what you need at a price you can afford. If you are planning an outdoor event, make sure you have a back-up plan in case mother nature doesn't cooperate. If the event is happening on City property, inquire about additional licenses or fees.

5. Licensing

If you are serving alcohol, ensure volunteers are *Smart Serve* certified. A special occasion permit may also be required. Application forms can be obtained from your local LCBO.

6. Setting a Fundraising Goal & Budget

Set a goal and create a plan to reach that goal. Create a budget to track your expenses and projected income. *See Appendix A for a sample budget.*

7. Donations and Tax Receipts

All donation cheques should be made out to:

Canadian Mental Health Association, Windsor-Essex County Branch
or CMHA-WECB
1400 Windsor Avenue
Windsor, ON N8X 3L9

If you have created an online fundraising page, donors will automatically receive a tax receipt electronically via email. Otherwise, tax receipts will be issued by mail for donations of \$20 or more provided that we have a contact name and complete mailing address. *See Appendix B for additional taxation information.*

8. Recruiting Volunteers

Do you need help leading up to the event and/or on the day of the event? If so, determine what duties need to be done, recruit and assign volunteers. To recruit volunteers, consider using social media to reach out to friends and family.

9. Use of the CMA-WECB Logo

To assist you with promotion and establishing the legitimacy of your event for supporters, CMHA-WECB can provide a “Proud Supporter” logo for your promotional materials (e.g. posters, brochures, flyers, invites, etc.). **To ensure the correct usage of the CMHA-WECB logo, all materials with our name or logo must be approved by the Advancement Department prior to use.**

10. Event Promotion

Distribute event posters, flyers, postcards, etc. at area businesses (after obtaining their permission). Post online using local, free community calendars, including: AM800 CKLW, Snapd Windsor, CTV Windsor, Windsorite.ca, BizX Magazine and others. You can also request CMHA-WECB post your event on our website and Facebook page.

11. Post-Event Wrap-up

Please tally and submit funds raised to CMHA-WECB within 30 days of your event so that we can issue tax receipts.

Remember to thank those who helped make your event a success. When you recognize the efforts of others, they will feel good about their experience and be more excited about helping again in the future.

Post photos and the event outcome on social media.

Third Party Event Proposal Form

Thank you for considering the Canadian Mental Health Association, Windsor-Essex County Branch as you plan your upcoming fundraising event. If you would like to host an independent fundraising event to benefit CMHA-WECB, please complete and submit this Third Party Event Proposal Form, for approval at least 30 days prior to your event. Once your fundraiser has been officially approved, a signed copy of the attached agreement form will be forwarded to you.

Contact Information

Name of Primary Contact person: _____

Name of Contact Organization / Group (as applicable): _____

Mailing Address: _____

City: _____ Prov: _____ Postal Code: _____

Home No.: _____ Cell No.: _____

Email: _____

Event Information

Event Name: _____ New Returning

Funds raised to be designated to:

Bereavement Client Assistance Fund Mental Health Promotion

Please describe your event and how the funds will be raised (i.e. ticket sales, raffle, auction, pledges, online fundraising, etc.) _____

Affiliation with CMHA-WECB

How did you hear about CMHA-WECB? _____

Financial Information

Please provide us with your best estimates of the following general budget information. A sample budget outline is included in this guide.

Total Expected Revenue: \$ _____ Expenses: \$ _____ Anticipated Net Revenue: \$ _____

Will supporters expect tax receipts for their contributions? Yes No

Support Provided by CMHA-WECB

At the discretion of CMHA-WECB, we would be pleased to provide you with a small supply of promotional materials for your event.

Please indicate which of the following you would like to receive:

Informational Brochures Donation Forms Giveaways/Swag

Would you like your fundraiser listed on our Calendar of Events and our Facebook page? Yes No

In order for us to fulfill your request for support, at least 30 days notice is preferred.

Marketing/Publicity Information

Will media be attending the event? Yes No

Will promotional materials, such as flyers, posters and advertisements be printed? Yes No

Do you plan to use the CMHA-WECB logo? Yes No

Note: All promotional materials developed with the CMHA-WECB name or logo must be approved by the Advancement Department.

Terms and Conditions

Third Party Fundraising Events are a very important component of the fundraising activities of the Canadian Mental Health Association, Windsor-Essex County Branch. In addition to funds raised, these events help create awareness and bring new support to our organization.

In order to ensure Third Party Fundraising Events have a positive impact on CMHA-WECB's public image, we fully expect that all individuals and organizations will adhere to the following guidelines when fundraising on CMHA-WECB's behalf:

1. The CMHA-WECB name and/or logo cannot be used to promote a fundraising event without prior approval by the CMHA-WECB. Unauthorized use is prohibited. All materials bearing the CMHA-WECB name and/or logo must be submitted in advance of the approved event prior to printing and/or publishing.
2. CMHA-WECB cannot support and/or endorse any alcohol or gaming events not sanctioned by the Alcohol and Gaming Commission of Ontario (AGCO). Event organizers is/are solely responsible for procuring any required licenses or permits, as outlined by AGCO or local governments or bodies.
3. Official tax receipts will only be issued in accordance with CRA guidelines. The final decision to issue official tax receipts is discretionary and rests solely with CMHA-WECB.
4. Event expenses may not be paid from tax-receiptable donations. All donations requiring a tax receipt must be received in full by the CMHA-WECB.
5. Accurate accounting of your event must be kept. CMHA-WECB will not be responsible or liable for any expenses incurred for a fundraising event.
6. All funds and financial accounting must be submitted to CMHA-WECB no later than 30 days after the event.
7. Fundraising events should not conflict with the mission of the CMHA-WECB.
8. You must provide all staffing and volunteers for your event and also employ your own mailing/contact list(s) for your fundraising event. CMHA-WECB cannot share its donor list or information.
9. You must obtain and pay for any necessary permits, licenses and insurance for the fundraising event.
10. Notify CMHA-WECB if the fundraising event is cancelled prior to the planned event day.
11. CMHA-WECB reserves the right to at any time withdraw the use of its name and/or logo.

Privacy Statement

We respect your privacy. CMHA-WECB collects your personal information in order to process your request to organize a fundraising event on our behalf and will not use such information for any purpose other than for which it was gathered.

I have read and agree to follow CMHA-WECB's Third Party Event Proposal Guidelines.

Signature: _____ Print Name: _____ Date: _____
(Organizer)

Signature: _____ Print Name: _____ Date: _____
(CMHA-WECB)

Please forward this completed and signed form to:

Advancement Department
CMHA-WECB
1400 Windsor Ave., Windsor, ON N8X 3L9
P 519-255-7440 or kwillis@cmha-wecb.on.ca / khill@cmha-wecb.on.ca



Tax Receipting Guidelines

The Canadian Mental Health Association, Windsor-Essex County Branch (CMHA-WECB) is a registered charitable organization under the Canada Revenue Agency.

CMHA-WECB can only issue official tax receipts if the following conditions are met:

1. The tax receipt is being issued to the person who made the donation OR in the event that a cumulative cheque is presented, that a complete list of donors is included. This list must include legible contact names and complete mailing information.
2. Tax receipts will only be issued for donations of \$20 or more.

Types of Gifts

1. **Donations** Donations made by cash, cheque or credit card with a value of \$20 or more will be issued a tax receipt in the name of the donor.
2. **Silent/Live Auction Purchases:** When an auction item is purchased the purchaser is receiving something (i.e. the purchased item) for their money, therefore a tax receipt will not be issued.
3. **Ticket/Entrance Fee Purchase:** The purchaser is receiving something in return for the purchase of their ticket, i.e. admittance to an event, therefore only a partial tax receipt can be issued based on the fair market value of the event. The difference between the ticket price and the benefit should be a minimum of 20% of the ticket price or \$20, whichever is higher.

Coordinator of a Fundraising Event

It is the CRA's view that where a Coordinator of a Fundraiser collects funds from the general public and pays the amount to a registered charity, the Coordinator is not eligible to receive a charitable donation receipt. The Coordinator is acting as an agent for the person(s) (donors) from whom the gifts were collected. The property transferred to the charity is the property of the person(s) from whom the gifts were collected on the understanding it would be given to a charity. Those persons are entitled to a charitable receipt within the guidelines of charitable tax receipting rules applicable to events.

Eligible Amount for Tax Receipts

The amount that may be receipted is the ticket price/entry fee minus the aggregate fair market value benefit amount. In all cases, a receipt cannot be issued if the benefit amount exceeds 80% of the price paid. Benefits may include but are not limited to: any products or services received by the donor, entertainment, food and/or beverage, and any other benefit given to the purchaser.

Fair Market Value

Fair market value is the highest price, expressed in a dollar amount, that the item would bring in an open, unrestricted market, between a willing buyer and a willing seller who are knowledgeable, informed and prudent and who are acting independently of each other. Fair market value does not include taxes, commissions, etc. If the fair market value cannot be established, a tax receipt cannot be issued. Even if a sponsor has paid to cover costs or has donated or discounted the price of the entertainment, food, etc., the same rule applies and only the price beyond the fair market value would apply for a tax receipt. For more details regarding fair market value and determining benefits, please review the CRA summary policy at www.cra-arc.gc.ca

Gifts in Kind

Generally, gifts-in-kind to be used at events are donated by companies and usually represent a gift from inventory. Income tax receipts will not be issued for these gifts as it is understood that the business would not benefit by receiving a tax receipt, as they would be required to claim the fair market value in its revenues. CMHA-WECB will provide the donating company with a thank you letter acknowledging their gift.

If an individual donates an item, the item needs to be of value and the fair market value must be established for the item at the time of donation. This can be done by:

- providing an invoice or other proof of purchase
- having an independent third party appraise and value the item at the donor's cost
- obtaining a current price list for the item from a recognized vendor operating independently of the donor

If the item was purchased within the last 3 years, then the fair market value is considered to be the lesser of the purchase price and the amount revealed in the appraisal.

Tax receipts will not be issued for gifts-in-kind below \$100. A tax receipt cannot be issued for personal services, e.g. legal, entertainment, transportation or dining services. Approval must be obtained in advance.

Donations of Artwork

The following documents are required to issue tax receipts for donations of artwork:

- An appraisal at the donor's expense
 - The appraisal must be signed by a certified appraiser
 - One page boiler plate appraisals, e-mailed appraisals, scribbled appraisals or appraisals written in pencil are not valid
- A list of credentials of the appraisal
- A history of the artist
- A description, picture and history of the piece of artwork, including significant points of reference
- The methodology used to value the artwork
- Reference to recent market purchases used to substantiate market value
- Proof of the date of acquisition of the artwork and a statement that the artwork was not purchased for the purposes of donation

CMHA-WECB cannot issue official income tax receipts in the following situations:

- Contributions of services
- Gift certificates where the donor was the issuer or the certificate was not purchased outright and then donated
- Use of vacation property

Corporate Contributions

Corporations can give in the following ways:

1. Donations

- a. If the donor is the corporation, 100% of the donation may be deductible as a business promotional expense
- b. If the corporation receives no benefits (i.e. advertising in a brochure, logo recognition, tickets, etc.) and all other requirements are met, a tax receipt may be issued at the request of the corporation.

2. Sponsorships

By virtue of being a sponsor, the corporation is receiving benefits in the form of recognition and advertising. An invoice or business confirmation letter will be issued which will support their contribution as a business expense.

3. Donation of Inventory - a gift-in-kind letter can be issued stating the value of the gift. Back-up is required to validate the value of the item(s).

4. Gift-in-Kind Donations - Businesses can deduct the original cost of the inventory as a business expense and not lose the tax benefit associated with the transfer of property. CMHA-WECB will issue a gift-in-kind letter that can be used to verify the write-off of the inventory.

5. Donation of Services - Tax receipts cannot be issued for services rendered.

Appendix A: Sample Event Budget

Event Budget for [Event Name]

Expenses

	Estimated	Actual
Total Expenses	\$700.00	\$300.00

	Estimated	Actual
Site		
Room and hall fees	\$500.00	
Site staff		
Equipment		
Tables and chairs		
Totals	\$500.00	\$0.00

	Estimated	Actual
Decorations		
Flowers		\$300.00
Candles	\$200.00	
Lighting		
Balloons		
Paper supplies		
Totals	\$200.00	\$300.00

	Estimated	Actual
Publicity		
Graphics work		
Photocopying/Printing		
Postage		
Totals	\$0.00	\$0.00

	Estimated	Actual
Miscellaneous		
Telephone		
Transportation		
Stationery supplies		
Fax services		
Totals	\$0.00	\$0.00

	Estimated	Actual
Refreshments		
Food		
Drinks		
Linens		
Staff and gratuities		
Totals	\$0.00	\$0.00

	Estimated	Actual
Program		
Performers		
Speakers		
Travel		
Hotel		
Other		
Totals	\$0.00	\$0.00

	Estimated	Actual
Prizes		
Ribbons/Plaques/Trophies		
Gifts		
Totals	\$0.00	\$0.00