

THE ELECTION CANDIDATE FUNDRAISING HANDBOOK

A Practical System for Ontario Municipal Campaigns

Raise Early. Ask Clearly. Track Every Dollar.

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EXECUTIVE OVERVIEW

Fundraising is not a side activity. It is the fuel that allows a campaign to introduce the candidate, repeat a clear message, organize volunteers, reach difficult-to-access households and operate a disciplined Get-Out-the-Vote program. This handbook turns proven fundraising habits into a practical weekly system for candidates, campaign managers, fundraising chairs and treasurers.

IMPORTANT LEGAL NOTICE

This handbook is educational and is not legal or accounting advice. Ontario municipal finance rules and local contribution-rebate programs can change. Before accepting contributions, incurring expenses or advertising a rebate, confirm the current rules with the municipal clerk, the Ontario 2026 Candidates' Guide, your treasurer and a qualified professional.

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How to Use This Handbook

Use this handbook as an operating manual, not as a one-time read. The candidate should master the message and personal-ask chapters. The campaign manager should own the calendar and scorecard. The fundraising chair should own prospect development and follow-up. The treasurer should own compliance, receipts, banking and reporting.

- Review the Quick-Start Checklist before the first public fundraising appeal.
- Assign one accountable owner to every fundraising function.
- Review fundraising numbers at the same time every week.
- Keep scripts, receipts, invoices and compliance documents in one controlled system.
- Confirm local rebate and filing requirements before promising anything to donors.

HENRY INSIDER TIP

Fundraising improves when it becomes a scheduled campaign function. Put donor calls on the candidate's calendar before filling the week with events, meetings and administration.

Quick-Start Fundraising Checklist

Priority	Why It Matters
1. File the nomination.	The campaign period generally begins when the clerk receives the nomination.
2. Appoint the treasurer and fundraising lead.	Money, messaging and follow-up need clear ownership.
3. Open the campaign bank account.	Campaign money must not be mixed with personal or business funds.
4. Obtain official limits.	The clerk provides spending and self-funding limits.
5. Build the first 50-name donor list.	Warm relationships produce the earliest contributions.
6. Write a one-sentence reason for running.	Donors support a clear purpose, not a vague ambition.
7. Create three specific ask amounts.	A direct amount is easier to answer than “anything helps.”
8. Schedule candidate call blocks.	Fundraising fails when it is left to spare time.
9. Set a 30-day cash target.	The target should fund real voter-contact activity.
10. Start the compliance calendar.	Every receipt, invoice and deadline must be tracked from day one.

SUMMARY ACTION LIST

- Complete all ten items before launching a major fundraiser.
- Ask the clerk for written confirmation of official limits and deadlines.
- Create one shared donor pipeline and one finance records folder.
- Schedule the first two weeks of candidate call time now.

Chapter 1

Fund the Voter-Contact Plan

Money does not win an election by itself. Money gives a disciplined campaign the ability to communicate at scale. The correct question is not “How much can we raise?” It is “What voter-contact plan must we fund to become known, trusted and remembered?”

Start with the campaign math

Build a practical budget for mail, literature, signs, telemarketing, SMS, digital support, volunteer materials, office systems and Election Day operations. Then establish a fundraising target that supports that plan. A random fundraising target produces random spending.

Campaign need	Planning question
Neighbourhood mail	How many priority households require one or more drops?
Literature	What quantities are needed for doors, events and volunteers?
Signs	Which sizes, locations and deployment waves are permitted?
Phone/SMS	How many supporters and undecided voters require follow-up?
Digital	Which content and audiences support field activity?
GOTV	What is required for calls, texts, rides, poll coverage and food?

Translate dollars into outcomes

- \$100 can support volunteer materials and targeted literature.
- \$250 can help fund a neighbourhood contact sequence.
- \$500 can support repeated visibility in a priority area.
- A maximum lawful contribution can help finance broader voter outreach and Election Day operations.

HENRY INSIDER TIP

Never promise a precise outcome that cannot be measured. Explain what contributions help make possible, and connect every fundraising appeal to a credible campaign activity.

SUMMARY ACTION LIST

- Build a line-item voter-contact budget.
- Separate must-have activities from optional upgrades.
- Set a 30-day cash target and an election-wide target.
- Prepare donor-friendly examples of what contributions help fund.

Chapter 2

Know the Rules Before You Ask

Ontario municipal fundraising is regulated. A strong campaign asks aggressively within the law and documents every transaction. A careless campaign can lose credibility, money and even the right to hold office.

Core contribution rules

Rule	2026 Ontario municipal standard
Eligible contributor	An individual normally resident in Ontario.
Single-candidate limit	\$1,200, except up to \$2,500 for a Toronto mayoral candidate.
Aggregate limit	\$5,000 total to candidates running for offices on the same council or school board.
Cash	\$25 or less may be accepted in cash.
Over \$25	Use a traceable method that shows where the funds came from.
Corporations and unions	Cannot contribute directly to candidates.
Fundraiser ticket	Counts as a contribution.
Goods and services	Fair market value generally counts as both a contribution and an expense.
Timing	Contributions and expenses are permitted only during the campaign period, subject to statutory exceptions.

Candidate and spouse self-funding

For municipal council candidates, the candidate-and-spouse contribution limit is calculated separately. The 2026 provincial formula is \$7,500 plus \$0.20 per eligible elector for head of council, and \$5,000 plus \$0.20 per eligible elector for a council member, capped at \$25,000. The clerk provides the official certificate. This self-funding limit does not apply to school board trustee candidates.

General campaign spending limit

Office	Formula
Head of council	\$7,500 plus \$0.85 per eligible elector.
Council member or trustee	\$5,000 plus \$0.85 per eligible elector.
Post-election appreciation limit	10% of the general spending limit.

COMPLIANCE RULE

Never copy another municipality's rebate wording, forms or deadlines. Contribution limits are provincial, but rebate programs and administrative procedures may be local.

SUMMARY ACTION LIST

- Obtain the preliminary and final spending-limit certificates.
- Record the self-funding limit separately from donor limits.
- Place contribution limits on receipts and donation pages.
- Create a process to reject or return ineligible contributions.

Chapter 3

Build the Fundraising Team

A serious fundraising program has clear ownership. The candidate must make the most important asks, but the candidate should not be managing every spreadsheet, receipt and reminder.

Role	Primary responsibility
Candidate	Tells the story, makes high-value asks, requests referrals and thanks donors.
Campaign Manager	Protects call time, sets weekly priorities and resolves obstacles.
Fundraising Chair	Builds the prospect pipeline, schedules calls and events, and manages follow-up.
Treasurer / CFO	Controls banking, receipts, invoices, bookkeeping, limits and filings.
Data / CRM Lead	Maintains donor status, notes, pledges, consent and contact accuracy.
Event Lead	Runs invitations, venue, guest experience, revenue tracking and post-event follow-up.

Protect the candidate's highest-value time

- Schedule fundraising calls before adding lower-priority meetings.
- Give the candidate a prepared call sheet with relationship notes and ask amount.
- Remove administrative decisions from the call block.
- Debrief immediately and assign every follow-up.

HENRY INSIDER TIP

The candidate should never finish a call session with handwritten notes scattered across a desk. Every result must be entered in the donor pipeline before the session is considered complete.

SUMMARY ACTION LIST

- Name one fundraising chair and one backup.
- Define the treasurer's approval and deposit procedures.
- Create a shared call-preparation template.
- Hold a 20-minute fundraising review every Monday.

Chapter 4

Build the Donor Universe

Top fundraising programs begin with relationships, not cold lists. The first goal is to identify people who know the candidate, trust the candidate, care about the community or can introduce the campaign to others.

The four donor circles

Circle	Examples	First approach
Inner circle	Family, close friends, long-standing personal relationships	Personal call from candidate.
Professional network	Colleagues, former clients, suppliers and business contacts	Personal call with clear campaign purpose.
Community network	Neighbourhood leaders, volunteers, associations and issue advocates	Introduction, meeting or small briefing.
Values network	Residents who share concerns about local services, safety, affordability or growth	Issue-based appeal and referral request.

Build a 100-name prospect map

- Write names first; do not judge capacity too early.
- Record relationship strength, likely interest and best connector.
- Assign a suggested ask amount based on relationship and lawful limits.
- Include a referral question for every conversation.
- Prioritize people who can become donors, hosts, volunteers or ambassadors.

Prospect rating

Rating	Meaning	Next step
A	Strong relationship and likely supporter	Candidate call within 72 hours.
B	Good connection or strong issue alignment	Warm introduction and call within one week.
C	Limited relationship but credible pathway	Invite to briefing or request introduction.
D	Unknown or poor fit	Do not consume prime candidate time yet.

SUMMARY ACTION LIST

- Create the first 50 names today and expand to 100.

- Assign an A-B-C-D rating and a proposed ask.
- Identify the best introducer for every B and C prospect.
- Review gaps by neighbourhood, profession, age and community.

Chapter 5

Make the Personal Ask

A fundraising ask should be clear, respectful and specific. Vague language forces the donor to guess what the campaign needs. A direct request gives the donor a real decision.

The five-part ask

1. Connection: acknowledge the relationship or introduction.
2. Purpose: explain the one-sentence reason for running.
3. Plan: describe the voter-contact activity the campaign must fund.
4. Ask: request a specific lawful amount.
5. Close: confirm the next step and thank the person regardless of the answer.

Core call script

CANDIDATE SCRIPT

"I am running because [one-sentence reason]. We are building a disciplined campaign to reach voters through [two or three activities]. I am asking a small group of people who know my work to help us begin strongly. Would you consider contributing \$250, \$500 or the maximum amount permitted?"

How to respond

Response	Candidate reply
Yes	"Thank you. We will send the official contribution instructions today."
Maybe	"What information would help you decide? May I follow up on [date]?"
Not now	"I understand. May I keep you informed and ask again later?"
No	"Thank you for hearing me out. Would you be comfortable introducing me to someone who cares about this issue?"
Cannot contribute	"There are other ways to help, including volunteering, hosting or displaying a sign when permitted."

DO NOT SAY

Avoid "Anything helps," "Donate whatever you can," or apologetic language. Be warm, but do not weaken the ask. A specific request respects the donor and the seriousness of the campaign.

SUMMARY ACTION LIST

- Write three ask levels appropriate to the prospect list.

- Practice the script until it sounds conversational.
- Send contribution instructions immediately after a yes.
- Schedule a specific follow-up date after every maybe.
- Thank every donor personally.

Chapter 6

Run a Weekly Fundraising Machine

One successful event is not a fundraising system. A professional campaign creates a repeatable weekly rhythm of prospecting, calls, follow-up, deposits, receipts, reporting and thank-yous.

Recommended weekly rhythm

Day	Primary activity
Monday	Review scorecard, cash needs, compliance and priority prospects.
Tuesday	Candidate call block; send immediate follow-up.
Wednesday	Prospect development, introductions and event invitations.
Thursday	Candidate call block; close outstanding pledges.
Friday	Deposits, receipts, bookkeeping and donor thank-yous.
Weekend	Small events, community meetings and relationship-building.

Campaign manager's scorecard

Measurement	Weekly target
Candidate donor calls	30-50
Personal conversations	15-25
Specific asks made	10-20
New contributors	Based on campaign cash target
Outstanding pledges	Follow up within 48 hours
Donor referrals requested	Two per contributor where appropriate
Thank-you calls completed	100%
Deposits and receipts	Completed on schedule

Pipeline stages

Status	Required action
Prospect	Research relationship and assign ask.
Contacted	Record result and next date.
Interested	Send official instructions immediately.
Pledged	Follow up with a specific completion date.
Contributed	Deposit, receipt, thank and request referral.
Stewardship	Keep informed without repeatedly asking too soon.

SUMMARY ACTION LIST

- Block at least three fundraising sessions each week.
- Review the same scorecard every Monday.
- Follow up on pledges within 48 hours.
- Complete deposits, receipts and data entry before the week closes.

Chapter 7

Events That Produce Results

Fundraising events work best when they are designed around a measurable objective. A crowded room is not automatically a successful event. The campaign must know the revenue goal, invitation strategy, cost ceiling and follow-up plan before booking the venue.

Event formats

- Neighbourhood coffee reception
- Community issues roundtable
- Campaign launch
- Business-leader breakfast
- Young-professionals reception
- Virtual campaign briefing
- Host committee dinner or small home reception

Event scorecard

Measure	Target or decision
Gross contribution goal	Set before invitations.
Expense ceiling	Approved by treasurer and campaign manager.
Invited prospects	Segment by host and relationship.
Confirmed guests	Track daily.
Specific asks	Plan who will ask and when.
New volunteers / hosts	Record separately from contributions.
Follow-up deadline	Within 24-48 hours after event.

Event compliance controls

- Confirm the event is held during the campaign period.
- Treat ticket prices as contributions and monitor individual limits.
- Track gross income and event expenses separately.
- Issue receipts and record contributor details.
- Do not accept corporate or association funds.
- Confirm when anonymous donations of \$25 or less are permitted at a fundraising event.

HENRY INSIDER TIP

The event itself creates energy; the follow-up creates revenue. Prepare the post-event call list before guests arrive.

SUMMARY ACTION LIST

- Give every event one financial and one relationship goal.
- Assign a host committee with named invitees.
- Approve the event budget before spending.
- Complete donor and pledge follow-up within 48 hours.

Chapter 8

Contribution Rebates and Donor Education

Some municipalities offer contribution rebate programs. These programs are local, voluntary and subject to detailed conditions. Never advertise a rebate unless the candidate has confirmed participation and the exact municipal rules.

Toronto example

Toronto's 2026 program is available to participating mayoral and councillor candidates. Eligible monetary contributions from Ontario residents may qualify for a rebate. The maximum rebate is \$1,000, and candidates participating in the program have additional filing requirements, including an auditor's report regardless of how much they raised or spent.

Total eligible contributions	Toronto rebate example
\$25 or less	\$0
\$50	\$37.50
\$100	\$75
\$200	\$150
\$300	\$225
\$500	\$325
\$1,000	\$575
\$1,200	\$641.67
\$2,275	\$1,000 maximum

Safe donor wording

SUGGESTED LANGUAGE

"Eligible Ontario residents may contribute subject to the Municipal Elections Act. A municipal contribution rebate may be available where the candidate and contribution qualify under the local program. Please review the official municipal rules before contributing."

NEVER SAY

Do not call a municipal campaign contribution a charitable donation or promise that it is tax-deductible. A municipal rebate is not a federal or provincial income-tax deduction.

GTA rebate status - verify before publication

Municipality	2026 public status noted	Candidate action
Toronto	Confirmed program	Opt in and follow Toronto filing requirements.
Vaughan	2026 program/by-law published	Review the by-law and candidate forms.
Markham	Program information published	Confirm opt-in and donor application deadline.
Mississauga	Program materials published	Verify current by-law and calculation.
Brampton	No program confirmed in supplied research	Ask the clerk before advertising.
Richmond Hill	No program confirmed in supplied research	Ask the clerk before advertising.
Ajax	Status not clearly confirmed	Ask the clerk before advertising.
Pickering	Status not clearly confirmed	Ask the clerk before advertising.

SUMMARY ACTION LIST

- Confirm candidate participation in writing.
- Use only official municipal rebate calculations and forms.
- Explain that rebates apply to eligible monetary contributions only.
- Track any additional audit and filing obligations.

Chapter 9

Financial Controls and Reporting

Fundraising succeeds only when the records are complete. The candidate remains legally responsible for filing a complete and accurate financial statement, even when a treasurer, bookkeeper or accountant prepares it.

Banking and receipts

- Open one campaign bank account when required.
- Deposit all monetary contributions, including candidate and spouse contributions, into the campaign account.
- Pay campaign expenses from the campaign account.
- Issue a receipt for every contribution.
- Record contributor name, residential address, date, value, payment method and type of contribution.

Expense and document controls

Record	Examples
Contributions	Money, goods, services, tickets and candidate/spouse funds.
Expenses	Printing, postage, signs, digital ads, telemarketing, SMS, office and software.
Fundraising events	Gross income, ticket contributions and event expenses.
Advertising	Publisher/broadcaster identity and contact details where required.
Inventory	Reused signs, materials and fair-market value.
Invoices	Paid, unpaid, disputed and reimbursed items.
Deadlines	Form 4, Form 6, supplementary statement and rebate filings.

Audit threshold

A licensed auditor's report is generally required when total campaign expenses exceed \$10,000 or total contributions received - including the candidate's own contributions - exceed \$10,000. Toronto rebate participants have an additional rule: participating candidates must submit an auditor's report regardless of the amount raised or spent.

Critical 2026-2027 dates

Date	Requirement
May 1, 2026	Nomination period opens; campaign begins when the clerk receives the nomination.
August 21, 2026 at 2:00 p.m.	Nomination deadline.

Date	Requirement
October 26, 2026	Voting Day.
December 31, 2026	Normal campaign period ends; Form 6 due if extending a deficit campaign.
March 30, 2027 at 2:00 p.m.	Initial financial statement deadline.
April 29, 2027 at 2:00 p.m.	End of the 30-day late-filing grace period.
June 30, 2027	Extended campaign period ends.
September 24, 2027 at 2:00 p.m.	Supplementary financial statement deadline.
October 25, 2027 at 2:00 p.m.	End of supplementary late-filing grace period.

PENALTY WARNING

Late filing, overspending or failure to turn over a surplus can trigger serious statutory penalties. Never wait until the filing month to reconstruct the campaign books.

SUMMARY ACTION LIST

- Reconcile the bank account weekly.
- File every receipt and invoice by date and category.
- Review contribution limits before deposits are finalized.
- Schedule a pre-filing review well before March 30, 2027.
- Retain records for the legally required period.

Chapter 10

Final-Month Fundraising Discipline

The final month is an execution period. Do not launch an entirely new fundraising strategy unless a clear need justifies it. Focus on closing pledges, funding proven voter-contact activities and protecting the candidate's time.

Final-month priority	Action
Cash forecast	Identify committed costs and remaining voter-contact gaps.
Outstanding pledges	Assign a specific follow-up owner and date.
Candidate time	Use focused calls to strong prospects and past supporters.
Events	Choose small, low-complexity activities with immediate follow-up.
Spending control	Require approval before new commitments.
Compliance	Prepare records continuously for year-end close and Form 4.

Do not chase vanity money

A late contribution is valuable only when the campaign can deploy it lawfully and effectively. Do not raise money merely to increase the total. Fund the activities that improve voter contact, supporter follow-up and turnout.

HENRY INSIDER TIP

In the final weeks, the campaign manager should know three numbers every morning: cash available, unpaid commitments and the cost of the remaining voter-contact plan.

SUMMARY ACTION LIST

- Prepare a weekly cash-flow forecast through campaign close.
- Close outstanding pledges before seeking cold prospects.
- Stop unapproved spending and last-minute experiments.
- Begin financial-statement preparation before December 31.

Appendix A

Scripts and Templates

1. Warm donor call

“Hello [Name], it is [Candidate]. I am calling personally because I have decided to run for [office]. I am running because [reason]. We need to raise the resources to reach voters through [plan]. Would you consider contributing [specific amount] to help us begin strongly?”

2. Referral request

“Thank you for your support. Who are two people you believe would care about this campaign and would be willing to hear directly from me?”

3. Pledge follow-up

“Thank you again for offering to support the campaign. I am following up as promised. I have sent the official contribution instructions. Would completing it by [date] work for you?”

4. Event invitation

Subject: A Small Briefing About the Future of [Ward/City]

I am inviting a small group of community leaders and neighbours to hear why I am running, the priorities I am hearing at the doors and the plan we are building to reach voters. I would be honoured to have you join us on [date/time/location].

5. Donor thank-you

“Thank you for investing in our campaign. Your contribution will help us reach more residents, build recognition and organize the voter-contact work required to compete. I appreciate your confidence and will keep you informed.”

6. Safe contribution disclaimer

Contributions are governed by Ontario's Municipal Elections Act, 1996, and local municipal procedures. Eligibility, contribution limits, rebate rules and filing requirements must be confirmed with the municipal clerk and campaign treasurer. Municipal campaign contributions are not charitable donations and are not federal or provincial income-tax deductions.

Appendix B

Worksheets and Scorecards

Donor prospect worksheet

Name	Relationship	Rating	Suggested ask	Connector	Next date

Weekly fundraising scorecard

Metric	Target	Actual	Notes
Calls attempted			
Conversations			
Specific asks			
Amount asked			
Amount received			

Metric	Target	Actual	Notes
Pledges outstanding			
Referrals received			
Thank-yous completed			

Event planning worksheet

Item	Decision
Purpose	
Date / time / location	
Host committee	
Gross goal	
Expense ceiling	
Invitation list	
Speaker / ask moment	
Payment and receipt process	
Follow-up owner and deadline	

Appendix C

GTA Quick Reference

Municipality	Typical council offices	Individual limit	Aggregate limit
Brampton	Mayor, regional councillor, city councillor	\$1,200	\$5,000 per council
Mississauga	Mayor, city/regional councillor	\$1,200	\$5,000 per council
Vaughan	Mayor, regional councillor, ward councillor	\$1,200	\$5,000 per council
Richmond Hill	Mayor, regional/local councillor, ward councillor	\$1,200	\$5,000 per council
Markham	Mayor, regional councillor, ward councillor	\$1,200	\$5,000 per council
Ajax	Mayor, regional councillor, local councillor	\$1,200	\$5,000 per council
Pickering	Mayor, regional councillor, city councillor	\$1,200	\$5,000 per council
Toronto	Councillor	\$1,200	\$5,000 per council
Toronto	Mayor	\$2,500	\$5,000 per council

Regional and local councillor offices generally use the same \$1,200 individual contribution limit. The candidate's spending limit is not a fixed GTA-wide amount; it depends on the number of eligible electors for the office and is certified by the clerk.

VERIFICATION REQUIRED

Municipal contribution rebate programs, candidate forms, deadlines and administrative procedures must be checked directly with each municipal elections office before publication or solicitation.

Official Resources and Help Contacts

- [Ontario 2026 Candidates' Guide - Campaign Finance](#)
- [Ontario 2026 Voters' Guide - Contributions](#)
- [Ontario Municipal Elections Act, 1996](#)
- [City of Toronto - Manage a Campaign](#)
- [City of Toronto - Contribution Rebates](#)
- [City of Brampton Elections](#)
- [City of Mississauga Elections](#)
- [City of Vaughan Elections](#)
- [City of Richmond Hill Elections](#)
- [City of Markham Elections](#)
- [Town of Ajax Elections](#)
- [City of Pickering Elections](#)

Final Disclaimer

This handbook provides general campaign-management information and is not a substitute for the Municipal Elections Act, 1996, its regulations, municipal by-laws, official clerk instructions or professional legal and accounting advice. Rules can change, and local rebate programs may impose additional requirements. The candidate is responsible for confirming current rules and filing complete, accurate statements on time.

THE STANDARD

Raise early. Ask clearly. Follow up respectfully. Deposit promptly. Receipt accurately. Reconcile weekly. File on time.

READY TO FUND A CAMPAIGN BUILT TO WIN?

Plan Earlier. Reach More Voters. Win More Recognition.

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