

Make-A-Wish® Southwestern Ontario
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FUNDRAISING GENERAL POLICY

APPROVAL AND COMPLIANCE

Make-A-Wish® Southwestern Ontario is pleased to be the recipient of funds raised by individuals, organizations and businesses who engage in fundraising activities. Third-party fundraising events must promote and maintain the positive image of Make-A-Wish Southwestern Ontario. Use of our name and/or logo must have prior approval from the Executive Director.

The Foundation's Executive Director shall determine if an event is appropriate for the Board's consideration. The Executive Director may submit the proposed event to the full Board of Directors for review, if assistance with the decision is needed. No person involved in a fundraising event on behalf of Make-A-Wish® shall directly solicit funds door to door, through telemarketing, or through Internet methods. Make-A-Wish Southwestern Ontario reserves the right to deny any fundraising proposal that does not fall within our mandate.

BENEFIT PROPOSAL FORM

Any individual, organization, or business wishing to conduct a fundraising event to benefit Make-A-Wish Southwestern Ontario must first complete a Benefit Proposal Form, which is attached hereto.

Make-A-Wish Southwestern Ontario will not be responsible for the debts incurred by those using Make-A-Wish Southwestern Ontario name for fundraising events. Make-A-Wish® does not obtain lottery licences for third-party fundraisers, and tax receipts will not be issued for funds raised through any form of gaming.

PUBLICITY & MATERIAL APPROVAL

Make-A-Wish Southwestern Ontario must approve all publicity, communication materials, media releases, and letters to individuals prior to their use. In signing this agreement, you agree to send samples of all materials using Make-A-Wish Southwestern Ontario name and/or logo to our office for approval before they are distributed. Please allow two business days for approvals. If you wish to publicize your event/activity through any media outlet, please consult with the Executive Director and/or Communications & Development Coordinator prior to contacting the media.

MEDIA RELATIONS POLICY

You are welcome to respond to media inquiries regarding your fundraising event/activity. However, for all media inquiries regarding Make-A-Wish Southwestern Ontario, we kindly ask that you follow our Media Relations Policy. As per the Media Relations Policy, our Executive Director is the designated spokesperson for Make-A-Wish Southwestern Ontario. Please refer all media inquiries regarding our Foundation to the Executive Director. In the absence of the Executive Director, the President shall be the designated spokesperson. If the President is also unavailable, the Executive Director may choose to designate a spokesperson. Any contact made by a member of the media to organizers of third-party events must be referred to the Executive Director or the designated spokesperson. It is important that third-party fundraisers adhere to this policy, to ensure that media inquiries are handled in a consistent and timely manner.

Make-A-Wish® Southwestern Ontario

CHARITABLE RECEIPTING POLICY – MARCH 2004

As a result of an audit by the Canada Customs and Revenue Agency (CCRA), we have created the following policy to determine the appropriate receipts and recognition we can give to a donor for their generous support of our organization.

Acknowledgment letters thanking donors for their gifts will be issued for every donation of \$20.00 or more. We are committed to providing tax-deductible receipts by December 31st of the current year.

Charitable tax receipts will be issued if:

- The gift is directly received from the donor (person or business)
- The cheque is made payable directly to “Make-A-Wish Southwestern Ontario” from the donor indicating the payment is a donation.
- Complete and legible mailing information is provided for events that have pledged gifts for amounts of \$20.00 or more.

Charitable tax receipt will **NOT** be issued:

- When individuals receive value from a third party fundraising event, or the amount of the cheque is representative of numerous individual donations.
- For cash donations (unless received directly from the donor by a Make-A-Wish Representative).

Due to the complexity of the documentation required by the CCRA, receipts at a third party event will only be issued for donations made directly to Make-A-Wish, where there is no participant registration fee, and no benefit to the individual from the event. (ie. silent auction items, golf fees, handouts)

GOODS:

Charitable tax receipts will only be issued for inkind donations of goods upon request and if the donor can provide reasonable support of their cost of the goods (i.e. purchase receipt or invoice).

Where the donor has owned the good(s) for over three years and the current market value is greater than their cost, they will need to provide reasonable support of the current market value.

SERVICE:

Charitable tax receipts will only be issued for inkind donations of service upon request and if the donor can provide reasonable support of the current market value of the service (ie. retail price list, catalogue, flyer or advertisement). To meet the CCRA requirements for a donation of service, an exchange of cheques for the service and donation will be required between the donor and Make-A-Wish.

BENEFIT PROPOSAL FORM

Please complete the form below, and return it to Make-A-Wish® Southwestern Ontario office as soon as possible. Upon receipt, we will review your proposal immediately. If approved, a representative will contact you. On behalf of all the children we serve, thank you for your support. We look forward to your fund raising event.

Name of Sponsoring Organization: _____

Address: _____

Organization's Phone Number: _____ Fax: _____

Organization's Contact Person: _____

Contact Person's Phone Number: _____ Fax: _____

Contact Person's Email Address: _____

Day of Event Emergency Contact Number (cell phone): _____

Brief description of organization (use additional sheet if necessary) _____

Name of proposed event: _____

Brief description of proposed event: (use additional sheet if necessary) _____

Location of proposed event: _____

Date, time, and duration of event: _____

Licence required for event: _____

Insurance for event: _____

Describe how funds will be raised to donate to Make-A-Wish® (i.e.: ticket sales, admission fees, silent/live auction, donations, etc.) _____

What resources, if any, will you require from Make-A-Wish?
(e.g. banner, newsletters, brochures, etc.)

Define the portion of the proceeds Make-A-Wish will receive:

What is your fundraising goal? _____

How will the event be promoted/publicized? _____

How long do you propose to promote the event and how will Make-A-Wish® Southwestern Ontario's name be used?

Will other non-profit groups receive a portion of the receipts as well? _____

If yes, please identify them and indicate the estimated percentage for each: _____

Date by which contribution to Make-A-Wish® is expected:

Make-A-Wish Southwestern Ontario is a volunteer driven organization, and as such we are unable to attend every event to which we are invited. Please indicate if you would like a Make-A-Wish Southwestern Ontario representative to be present at your event.

YES NO

If yes, please indicate date, time, and activities below:

Date: _____ Time: _____

- Cheque acceptance
- Speaking on behalf of Make-A-Wish®
- Other (please explain)

Additional Comments: _____

The Sponsoring organization understands and agrees to be bound by the Fundraising General Policy, the Charitable Receipting Policy, and by the following terms and conditions, as indicated by their signature below:

1. All promotional items such as flyers, brochures, letters, and tickets that contain the Make-A-Wish® name and/or logo must be approved by Make-A-Wish® Southwestern Ontario.
2. Make-A-Wish Southwestern Ontario must approve all publicity containing the Make-A-Wish name and/or logo prior to its use.
3. The sponsoring organization may not contract any goods or services under the name of Make-A-Wish® Southwestern Ontario.
4. If a liquor licence is required for the event, it will be applied for and obtained in the name of the sponsoring organization.
5. The sponsoring organization will indemnify and save harmless Make-A-Wish Southwestern Ontario and its servants, agents, employees, officers and directors from and against all claims, suits, and causes of action arising out of the fundraising event.
6. Make-A-Wish Southwestern Ontario will not be responsible for any expenses or costs incurred in carrying out the fundraising event unless agreed to in writing by Make-A-Wish Southwestern Ontario.

Date: _____

Name of sponsoring organization: _____

Signature Per: _____

Title: _____

APPROVAL GIVEN BY: _____

TITLE: _____

DATE: _____