

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 Chief Executive Officer.

Make-A-Wish Southwestern Ontario's Chief Executive Officer shall determine if an event is appropriate for the Board's consideration. The Chief Executive Officer 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 fund-raising 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 the Make-A-Wish name for fund-raising events. Make-A-Wish does not obtain lottery licences for third-party fund raisers, 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 the Make-A-Wish name and/or logo to our office for approval before they are distributed. Please allow two business days for approval. If you wish to publicize your event/activity through any media outlet, please consult with the Chief Executive Officer and/or Manager of Communications and Development 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 Chief Executive Officer is the designated spokesperson for Make-A-Wish Southwestern Ontario. Please refer all media inquiries regarding Make-A-Wish to the Chief Executive Officer. In the absence of the Chief Executive Officer, the President shall be the designated spokesperson. If the President is also unavailable, the Chief Executive Officer may choose to designate a spokesperson. Any contact made by a member of the media to organizers of third-party events regarding Make-A-Wish Southwestern Ontario must be referred to the Chief Executive Officer 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.



Charitable Receipting Guidelines for Donor Events

Make-A-Wish® is committed to following all rules and regulations regarding tax receipts set out by the Canada Revenue Agency (CRA). Charitable tax receipts will only be issued in accordance with CRA guidelines.

If tax receipts for your participants are a major consideration in the likely success of your event, please review the tax receipting guidelines and contact Make-A-Wish before you make any final decisions regarding your event.

Event organizers are asked to submit the net proceeds of the event only and take out the direct cost of the event (expenses) prior to forwarding their contribution to Make-A-Wish.

Please note that in order to issue charitable tax receipts for the current calendar year, funds and supporting documents must be received in the Make-A-Wish office by December 31st.

Make-A-Wish can provide charitable tax receipts to donors at third-party events under the following circumstances:

1. If donations are collected on behalf of Make-A-Wish, any donation of more than \$100 must be made with a cheque payable directly to Make-A-Wish. For smaller donations requiring a tax receipt (minimum \$20 donation), the event organizers must submit, along with the funds, a detailed breakdown on a Make-A-Wish donation tracking sheet with the full name, address, donor signature, and amount to be receipted. A separate cheque in the amount of the total of the receiptable cash donations must be forwarded with the tracking sheet. We prefer not to receive event donations and/or proceeds in cash.
2. The gift must be directly received from the donor (person or business) and cheques must be made payable directly to "Make-A-Wish Southwestern Ontario" from the donor indicating the payment is a donation.
3. Charitable tax receipts for in-kind donations (e.g. products) will only be issued when the gift is received directly by, and authorized by, Make-A-Wish. Event organizers must contact Make-A-Wish before promising tax receipts on our behalf for in-kind donations. CRA maintains strict guidelines as to what in-kind donations are receiptable and Make-A-Wish adheres strictly to these guidelines, so the final decision to issue a tax receipt must lie with Make-A-Wish.

Make-A-Wish cannot issue a charitable tax receipt:

1. To donors, sponsors or organizers who receive value from a third-party fund-raising event.
2. For gifts of service. At law, a gift is a voluntary transfer of property. Gifts of services (donated time, skills, or efforts) provided to a charity are not property, and therefore do not qualify, according to the CRA, as gifts for the purposes of issuing charitable tax receipts.
3. For the purchase of auction prizes. If someone purchases an item at an auction, they are considered by the CRA to have received something of value (the purchased item, as well as the opportunity to participate in the auction) and therefore a tax receipt will not be issued.
4. For the purchase of a ticket or entrance fee to an event (gala, show, sporting event or auction). The purchaser is considered by CRA to be receiving something of value in return for their payment.
5. Tax receipts will not be issued for funds raised through any form of gaming.
6. Sponsorship dollars are not receiptable, as sponsors are considered by CRA to be receiving marketing value in return for their sponsorship. See the Rules of Sponsorship below.

The Rules of Sponsorship

According to the CRA, “sponsorship” is a donation made by a business to a charity for which in return it receives advertising or promotion of its brand, products or services.

CRA takes the view that sponsorship funds are fees and not gifts and accordingly, charitable tax receipts cannot be issued for sponsorship fees because the sponsor receives something of value in exchange – such as logo exposure, advertising or other types of consideration.

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 fundraising event!

Name of Sponsoring Organization: _____

Address: _____

Organization's Phone Number: _____ Fax: _____

Organization's Contact Person: _____

Contact Person's Phone Number: _____ Fax: _____

Contact Person's E-mail Address: _____

Would you like to join our monthly e-mail newsletter list? Yes No

If your event is open to the public, would you like us to post your event on our chapter website? Yes No

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

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

Reason for Supporting Make-A-Wish® _____

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®?
(i.e. banner, newsletters, etc.)

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

What is your event budget (use additional sheet if necessary)?

Expenses	Dollar Amount	Revenue	Dollar Amount
Supplies			
Food / Refreshments			
Postage / Shipping			
Equipment Rental			
Entertainment			
Awards / Gifts			
Cost of Goods Sold			
Travel			
Advertising			
Printing			
Signage			
Facility Rental			
Decorations			
Security			
Insurance / licences			
Other			
Total Expenses:		Total Income:	

Total Income – Total Expenses = Anticipated Revenue to Make-A-Wish

Enter Amount Here: \$ _____

How will the event be promoted/publicized? _____

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

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

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

Date by which contribution to Make-A-Wish is expected (*If your event is near the end of the calendar year, please be sure to submit your funds by December 31st.*)

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.

Would you like a Make-A-Wish representative to be present at your event?

YES NO

If yes, although we cannot guarantee a representative, we will do our best!

Please indicate date, time and activities below:

Date: _____ Start Time: _____ End Time: _____

- Cheque acceptance
- Speaking on behalf of Make-A-Wish (please include length of presentation and additional details on the lines below).
- 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 (i.e. flyers, brochures, letters, tickets, etc.) 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 or gaming 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.
7. For your protection, as well as the protection of our Volunteers, Wish Family Representatives and Make-A-Wish, please do not give any gifts of cash or products/services directly to our Volunteers or Wish Family Representatives. We kindly ask our Volunteers and Wish Families to politely decline any gifts of cash or products/services offered to them while representing Make-A-Wish.

Please deliver cash proceeds from your event to your Make-A-Wish representative or directly to our Make-A-Wish Southwestern Ontario office, or send us a cheque or money order made payable directly to Make-A-Wish Southwestern Ontario. Thank you!

Date: _____

Name of sponsoring organization: _____

Signature Per: _____

Title: _____

MAKE-A-WISH APPROVAL GIVEN BY: _____

TITLE: _____

DATE: _____