

# Fundraising Proposal Document



Make-A-Wish® Southwestern Ontario is grateful for the support of generous people and businesses in the community. On behalf of our wish children and their families, we thank you for choosing to support us.

## 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 consideration. 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 the Make-A-Wish 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 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 Manager of Communications and Fundraising 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. 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 31<sup>st</sup>.**

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 fundraising 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

Make-A-Wish®

Please complete the form below and return it to our office as soon as possible. Upon receipt, we will review your proposal immediately. We look forward to your fundraising event!

## Event Organizer Contact Information: *(info of person that will be main contact for the event)*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Are you organizing the event on behalf of an organization?  Yes  No

If yes, please fill out the following info:

Name of Organization: \_\_\_\_\_

Website: \_\_\_\_\_

Have you fundraised for any other non-profit organization in the past?  Yes  No

If yes, please provide details: \_\_\_\_\_

\_\_\_\_\_

Reason for supporting Make-A-Wish Southwestern Ontario: \_\_\_\_\_

\_\_\_\_\_

## About the Fundraising Initiative:

Name of proposed event: \_\_\_\_\_

Brief description of the event: \_\_\_\_\_

\_\_\_\_\_

Location of proposed event: \_\_\_\_\_

Event Date & Time: \_\_\_\_\_ Duration:  One Day  Ongoing

If ongoing please indicate start and end dates: \_\_\_\_\_

\_\_\_\_\_

### About the Fundraising Initiative (cont'd):

Is this a public or private event?  Private  Public

If your event is open to the public, would you like us to post it on our Social Media?  Yes  No

How will funds be raised? List all forms of revenue that apply.  
(ticket sales, pledges, registration fees, donations, silent auction etc.)

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### Financial Fundraising Information:

Will Make-A-Wish be the only beneficiary?  Yes  No

If 'No', please list other beneficiary/s and indicate the estimated percentage for each:

Other Charities: \_\_\_\_\_

Percentage of Proceeds: \_\_\_\_\_

### Budget

(Please note that figures are only estimates)

Total Projected Gross Revenue (all funds raised) \$ \_\_\_\_\_

Total Projected Expenses (venue rental, food, printing, etc.) \$ \_\_\_\_\_

Net Revenue (proposed donation= Revenue less expenses) \$ \_\_\_\_\_

- I plan to cover all expenses myself/my company plans to cover expenses
- The expenses will be covered through sponsorship  
*(Please note that sponsorships are not eligible for a tax receipt. Please review Fundraising & Tax-Receipt General Policy document)*
- I plan to use a portion of the funds raised (**excluding receiptable donations**) to cover expenses

Will attendees be given the opportunity to make a personal monetary donation?  Yes  No  
*(Please note that donations made directly to Make-A-Wish cannot be used to pay expenses)*

Are tax receipts expected to be generated for this fundraising initiative?  Yes  No

**Tax receipts are issued according to Canada Revenue Agency guidelines. Final decision to issue a tax receipt rests with Make-A-Wish. For more information on this, please visit [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca).**

### Event Promotion:

When do you plan to start promoting your event? \_\_\_\_\_

How long will you be promoting the event? \_\_\_\_\_

How will you be promoting this initiative? Check all that apply:

Word of Mouth  Posters  Website  E-mails  Radio  Television  Social Media

Other: \_\_\_\_\_

Please list event website and social media links:

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Would you like Make-A-Wish Southwestern Ontario to create a online donor page for your event?

Yes  No

What resources, if any, will you require from Make-A-Wish Southwestern Ontario?

*(banners, brochures, newsletters, etc. Please note that supplies are limited and may not always be available)*

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### **Representation Support Request:**

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. It is our practice to provide a volunteer to assist or speak on behalf of Make-A-Wish Southwestern Ontario if requested and when available.

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).

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- Other (please explain)

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Additional Comments:

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**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!

I, \_\_\_\_\_ read, fully understand and agree to be bound by the Fundraising & Tax-Receipt General Policy provided to me by Make-A-Wish Southwestern Ontario. I agree that all material using the Make-A-Wish logo will not be printed without prior approval from Make-A-Wish.

**Name of Event Organizer:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Make-A-Wish Approval Given By:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_