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## Community Events Policies and Guidelines

Thank you for considering McCormick Home as a benefactor of your fundraising event. We always welcome new and innovative fundraising and awareness raising ventures, in addition to our signature event.

By supporting McCormick Home you are helping to enhance the quality of life for our residents and clients of Alzheimer Outreach Services.

McCormick Home cannot help with the funding of your event, but we can help in other ways to make it a success. Please read the following policies and guidelines carefully. They have been established to protect you, your fundraising group, McCormick Home, its residents and clients.

If you have any questions on any of the policies listed below, please contact Lori Ann Horley, Director of Development at [lahorley@mccormickhome.on.ca](mailto:lahorley@mccormickhome.on.ca) / 519-432-2648 ext. 2318.

### What is a third party event?

A third party event is a fundraising initiative organized, staged and funded by a community group, club, business or individual(s) who wish to raise money on behalf of McCormick Home Foundation.

### How We Can Help?

- McCormick Home will acknowledge the third party fundraiser with appropriate recognition.
- McCormick Home can provide guidance and advice on event planning.
- We can provide information brochures on McCormick Home and/or Alzheimer Outreach Services Program for your event.
- We will try our best to send a member of our staff to attend your event. Unfortunately, due to staffing constraints, McCormick Home Foundation may not be able to provide a representative.

### General Policies

#### Document Submission

- The Community Event Organizer must submit a signed copy of both the Community Event Guidelines and Community Event Proposal form. Please mail them to:

McCormick Home Foundation  
Attn: Lori Ann Horley  
Director of Development  
2022 Kains Road  
London, ON N6K 0A8

- McCormick Home Foundation must receive a completed Community Events Proposal Form at least 8 weeks prior to the event. McCormick Home Foundation will respond to the event request form 6 weeks prior to the event.
- An approval from McCormick Home must be received prior to using McCormick Home's identity in the event.
- McCormick Home reserves the right to decline any sponsorship which McCormick Home believes may have a negative reflection on McCormick Home or is not in keeping with our mission.
- McCormick Home reserves the right to decline an event which competes or conflicts with an already established or scheduled event which benefits McCormick Home.

## Proposal Review

McCormick Home will review the Community Events Proposal Form. In order to help you evaluate your requirements, the following are considerations that McCormick Home will use in the evaluation of a proposal:

- Have you provided sufficient information in your proposal?
- Does the initiative fit within the mission of McCormick Home?
- Does the timing of the initiative work with our current roster of activities?
- Does the initiative contravene any McCormick Home policies?
- Is the fundraising plan achievable?
- Is there a cancellation plan in place?
- Have you obtained all necessary licenses (Raffle, LCBO, etc.) for the event?
- What is the Revenue/Expense Ratio based on the Budget provided?

## Proposal Approval

If your application is approved, we will provide you with a *Letter of Agreement* within two weeks of receiving your application. The *Letter of Agreement* may be shown to potential donors, sponsors, and volunteers.

- Due to privacy regulations, McCormick Home cannot release donor, volunteer, employee or client mailing lists for the purpose of additional solicitation of funds by third party groups.
- McCormick Home will not disclose resident or client names or stories for the promotion or staging of your event.
- All donor information from your event will be kept confidential. McCormick Home Foundation will not share, trade or sell any of the donor information. McCormick Home Foundation maintains a strict policy of respecting donor privacy.



## Financial Policies

- McCormick Home will not be financially liable for the organization and staging of the event.
- The third party fundraising organization shall present McCormick Home with a projected donation amount and an established budget at the onset.
- The third party fundraising organization will handle all monies for the event and present the proceeds and completed Appendices to McCormick Home Foundation within 30 days of the completion of the event.
- McCormick Home is not responsible for any financial loss incurred from the event.
- McCormick Home Foundation will comply with all current Canadian tax laws. McCormick Home Foundation will issue charitable receipts for monetary donations in excess of \$15.00 in keeping with CRA guidelines.
- Sponsorship funding will be acknowledged with business receipts.

## Publicity Guidelines

- McCormick Home must approve all promotional materials and/or advertisements pertaining to the event using McCormick Home logo or identity.
- The third party fundraiser shall take full responsibility for any costs incurred by purchasing any media advertisement to promote an event (e.g. television, radio, outdoor, billboard, PSA, magazine or brochure).
- Event names may not incorporate the name McCormick Home Foundation as in "The McCormick Home Walkathon" but may use a second line identifying the relationship with McCormick Home such as "Smith Family Walkathon, benefiting McCormick Home Foundation".

**The above McCormick Home policies and guidelines have been read and agreed to by;**

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

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

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

Company / Organization: \_\_\_\_\_

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

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