

**OPERATIONS POLICY & PROCEDURE MANUAL  
Calgary Meals on Wheels**

**Subject:** EXTERNAL FUNDRAISING EVENTS POLICY

**Policy Number:** FD604

**Date Established:** April 21, 2014

**Date Revised:** August 12, 2015

**Date Effective:** January 1, 2015

**Purpose:**

In accordance with Canada Revenue Agency guidelines and for the benefit of Calgary Meals on Wheels and the Third Party Event Organizer, Calgary Meals on Wheels has established the following:

**Policies:**

Third Party events are required to:

- Be consistent with the Vision and Mission of Calgary Meals on Wheels
- Maintain positive presentation and give Calgary Meals on Wheels positive exposure and increased public awareness
- Benefit Calgary Meals on Wheels operations and meal programs

Calgary Meals on Wheels reserves the right to:

- Refuse involvement, and the use of its name and logo, at any time and in any event that does not meet with its expressed approval
- Relinquish support of any third party event that does not abide by the policies, criteria and guidelines set out in this agreement without liability or obligation

**Criteria:**

The Executive Director of Calgary Meals on Wheels will approve a third party fundraising event and sign the agreement with the Third Party Event organizer based on compliance with the following:

1. Calgary Meals on Wheels requires three weeks advance notice of third party fundraising events.
2. The organizer is required to complete the Host an Event Application.
3. Consistency of the event with Calgary Meals on Wheels Vision and Mission.
4. Profitability of the event.
5. Positive marketing/public relations exposure.
6. Meeting staff and volunteer resource requirements.

## **Guidelines:**

For approved third party events/promotions, the Third Party Event Organizer and Calgary Meals on Wheels are required to adhere to the following guidelines:

### 1. Calgary Meals on Wheels Brand

It is important for Calgary Meals on Wheels to maintain brand integrity and consistency in the public eye. Calgary Meals on Wheels asks the External Event Organizers to follow these branding guidelines:

- Calgary Meals on Wheels name – the organization will be referred to as Calgary Meals on Wheels, not simply Meals on Wheels
- Logo and logo use – the Calgary Meals on Wheels logo is the sole property of the organization and will be used only with expressed permission. Usage is limited to the approved event. The Executive Director of Calgary Meals on Wheels reserves the right of final approval for any event materials containing the logo.
- Promotional materials – Calgary Meals on Wheels will have final, signed approval on all promotional materials (brochures, flyers, advertisements, and public and media communications).

### 2. Donations and Sponsorships

External Event Organizers will provide a list of sponsors who have donated to the event and include a description of their donation plus retail value. The purpose is to allow Calgary Meals on Wheels to better recognize partners in the community.

### 3. Solicitations

Calgary Meals on Wheels does not directly solicit their supporters or volunteers for funding, ie. Email, phone calls, in-person, for any external fundraising event.

Privacy

### 4. Calgary Meals on Wheels does not share any supporter or volunteer personal information with the external event planner.

### 5. Lottery Licenses (including raffles, 50/50 sales and licenses)

Third party events involving licenses and fees will conform to government regulations (federal, provincial and municipal). It is the sole responsibility of the External Event Organizer to fill out and submit all such applications and post event reports.

### 6. Financing and Insurance

Calgary Meals on Wheels will not underwrite any external event organized outside the organization. Calgary Meals on Wheels insurance will not cover external events.

Calgary Meals on Wheels is not responsible for any expenses or damages experienced during a third party fundraiser.

7. Photographs/Feedback from Third Party Fundraisers

Calgary Meals on Wheels reserves the right to display any photos or quotes from individuals participating in events or third party events to be displayed on Calgary Meals on Wheels website, social media pages, bulletin boards, posters, brochures and all other promotional materials.

8. Tax Receipts

Calgary Meals on Wheels may provide receipts for income tax purposes, for donations incurred through the event, and for which documentation has been provided and only if the donation is deemed receiptable by Canada Revenue Agency. Calgary Meals on Wheels reserves the right to issue, or not issue any receipts at its sole discretion. For further information, see Calgary Meals on Wheels Gift Acceptance Policy FD600.

**Policy Reviewed By:** \_\_\_\_\_

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