



COMMUNITY EVENTS GUIDELINES



PREAMBLE

Community events are fundraising initiatives directed and managed by individuals and groups in the community where some or all of the event proceeds are donated to William Osler Health System Foundation (the Foundation). The purpose of the Community Events policy is to ensure that all events undertaken in support of the Foundation are successful, positive experiences that reflect well on William Osler Health System (WOHS) within the community and encourage and allow others to join in the cause of supporting our community hospitals. In addition, this policy will enable Foundation staff to give external groups that manage events on behalf of the Foundation a clear understanding of what is required of them, and what assistance will be given by the Foundation in order to run the event successfully.

POLICY

1. Preservation of the integrity and high reputation of William Osler Health System and William Osler Health System Foundation are the first priority, ahead of any potential financial gain.
2. The Foundation prides itself in working with organizations and individuals with established roots in the community, although, we certainly do encourage and support new relationships.
3. The WOHS and Foundation logos are to be used on signs, publications, etc. according to the standards set for the corporate identity and should not be used without prior review and consent by a representative of the Foundation.
4. The Foundation has a responsibility to those who contribute to a community event to ensure that the benefit received by the Foundation is in line with reasonable donor expectations.
5. Community events that involve WOHS or the Foundation must be in keeping with community standards for good taste, good health and social tolerance.
6. Funds entrusted to the Foundation should not be risked in projects directed by others.
7. In view of its limited staff and volunteer resources relative to the number of fundraising events in a typical year, participation by Foundation staff and volunteers should be minimal and should not be a critical element in the success of any community event.
8. Charitable Donation Receipts for gifts-in-kind, ticket purchases, or for any other consideration related to a community event shall be issued in accordance with the Donation Receipting Policy for William Osler Health System Foundation. For further information, please contact your local Foundation office.

GUIDELINES:

1. The Foundation will not provide "seed money" or otherwise invest money in events directed by others.
2. While Foundation staff will be pleased to have information available regarding the event, including where and how to acquire tickets, we are unable to actively participate in the sale of tickets.

3. Any organization wishing to identify WOHS or the Foundation as benefiting from an activity, should complete an Event Proposal Form to be signed by the organization and the Foundation. The Event Proposal Form will:
 - Describe the nature and timing of the event;
 - List confirmed and prospective event sponsors;
 - Identify the key contact person(s) running the event;
 - Set out an acceptable benefit to the Hospital;
 - Agree on how the benefit will be described (e.g. "all proceeds to..." or "in support of...");
 - Include estimated revenues & expenses and describe how accountability will be handled (e.g. financial report etc);
 - Set out expected and latest dates for funds transfer;
 - Identify several persons from the community involved in the project;
 - Describe what is expected of the Foundation (use of name, logo, form of recognition, event attendance, etc.);
 - Be signed by a responsible member of the organization managing the event.

(see attached William Osler Health System Foundation Event Proposal Form)

4. It is recommended that gifts-in-kind from business inventory be treated as promotional or advertising expenses. Where a Charitable Donation Receipt is requested, one will be provided, provided the necessary documents are submitted.
5. The Foundation cannot issue a charitable donation receipt for a ticket to an event where participants have a chance to win a prize or where a fundraising auction is held exclusively for those attending the event. For an event with no prizes and no auction, a portion of the cost of the ticket may be eligible for a Charitable Donation Receipt. The amount of the receipt will be in accordance with the regulations stated by Canada Revenue Agency.
6. The Foundation will be pleased to provide event sponsors with official acknowledgement confirming the amount received by the Foundation for their sponsorship, but cannot issue a Charitable Donation Receipt for sponsorship.
7. Community events meeting the criteria of this policy will be provided with support including:
 - Advertising of the event internally to staff, physicians and volunteers
 - Promotion of the event on the Foundation web site
 - Use of the Foundation logo
 - Requests for local media coverage of cheque presentations of \$5,000 or more
 - Additional recognition as per the Foundation's policy on donor relations
 - Use of one or more banners with the name and logo of the Foundation
 - Printed material concerning WOHS and the Foundation as is available at the time of the event
 - Representation and participation of Foundation staff and volunteers as appropriate to the size and scope of the event. A minimum of three weeks notice is required if a representative is requested to attend a community event.