



**McCormick  
Care Foundation**  
Enhancing Care and Enriching Lives

COMMUNITY EVENTS  
**FUNDRAISING  
TOOLKIT**

Charitable Business #11903 5434 RR0001

# THANK YOU!

---

## For making an impact with McCormick Care Foundation


Thank you for raising money for McCormick Care Foundation. Since you've chosen us, we want to make it easy for you.

This fundraising toolkit is a step-by-step guide that will help you plan and organize from start to finish so that your event is a big success.

When you support McCormick Care Foundation, you are joining a committed, passionate community of supporters who believe quality of life at every age is possible. Each year, we enrich the lives and provide enhanced care to individuals living with dementia, residents and their families who seek our support for everything from personal care to the most complex and varied forms of dementia.

And through the discoveries made by our research partners, and by educating tomorrow's leaders in dementia and long-term care, we are ensuring people with dementia lead meaningful lives and create a caring community in which our clients, residents, family members and caregivers feel a sense of safety, belonging and purpose. The generous support of our donors makes this possible.

On behalf of all of us at McCormick Care Foundation, thank you very much for your dedication to dementia and long-term care.



Michelle Hancock  
Executive Director  
McCormick Care Foundation

# 10 STEPS TO SUCCESS

---



## **Step 1:** BRAINSTORM & SET GOALS

Questions to consider to get your brainstorm started:

- What type of event would you like to host?
- What is your fundraising goal?
- How do you plan to go about fundraising?
- For other things to consider please check out our [action plan](#).



## **Step 2:** FORM AN EVENT COMMITTEE

Many hands make light work! It will be helpful to bring together like-minded individuals to share tasks that have a variety of skills and experience to make your event a success!



## **Step 3:** SET A DATE AND VENUE

Set a date and time for your event. It's best to use a location that is convenient for you and your attendees. Do a scan of events happening in your area to make sure that your event doesn't conflict with another.

Be mindful of holidays, weather (time of year), transportation issues and the number of participants.



## **Step 4:** MAKE A BUDGET

Brainstorm and identify your possible sources of income (ticket sales, sponsorship, promotional draw, etc.) and develop an estimate of all potential expenses. These would include venue costs, decoration, food, entertainment. Remember, if you keep your costs down and under control it will enable you to raise a larger amount. You can use our sample budget plan as a reference to develop your own budget.

Please note that all event expenses need to be covered by the event organizer. McCormick Care Foundation will not cover any event expenses.



## Step 5: TELL US ABOUT YOUR EVENT

Fill out our event proposal form online

Once the form has been submitted, a McCormick Care Foundation Representative will contact you to help you get started. Your McCormick Care Foundation Representative will talk to you about your event plans, share any materials you may need and answer any questions that you may have.



## Step 6: PLAN AHEAD

Here is an example of a planning check list with accompanying resources that can help you plan your event. Note: Please choose only what is applicable for your event.

- Identify a theme
- Choose a date
- Establish a team/committee
- Create a realistic budget
- Submit an Event Proposal Form
- Develop an action plan
- Identify and solicit sponsors
- Source venues and services
- Set up online fundraising page
- Recruit volunteers
- Create/send out invitations
- Determine rental needs
- Determine food/beverage needs
- Determine entertainment need
- Decide on décor
- Read about our tax receipting rules and regulations
- Create "day of" agenda for your event
- Delegate tasks to your committee
- Secure permits and insurance
- Promote your event/share your story
- Remember to thank everyone!
- Be proud & celebrate your success!
- Wrap up your financials and submit them to your McCormick Care Foundation Representative
- Meet with your committee to discuss success and challenges to improve your event for next year
- Register your event with us again for next year so we can continue to support.



---

## **Step 7: FUNDRAISE**

You can either fundraise online, offline or both! Choose whichever works best for you and your audience.

### **ONLINE FUNDRAISING**

Online fundraising is an effective and efficient way to engage your supporters and create an easy vehicle to make a contribution to your event. Your McCormick Care Foundation Representative will help you create your own personal or group fundraising page. They will discuss options with you to set up your own personal fundraising page and help you every step of the way.

### **OFFLINE FUNDRAISING**

You can also collect pledges, cash or cheques, in person at your event or leading up to it. Please ensure cheques are payable to McCormick Care Foundation.

Please make sure to record the donations and donor information accurately. Your McCormick Care Foundation Representative will make sure you have the tools and resources to do so. Collect all of your donations and send these along with your donation form to your McCormick Care Foundation Representative within 60 days of the event.



## Step 8: PROMOTE YOUR EVENT

Promote your event as much as possible to get the most out of your fundraiser. Think of the type of audience you want to participate and the best way to engage them. Here are a few things to consider:



**SOCIAL MEDIA:** promote your event via Facebook, Twitter or Instagram as they can help you get your message out to the community. It's also a great idea to set up an online fundraising page with us that you can link to your social network sites.



**MEDIA RELATIONS:** There is the potential that your local newspaper or news station may be interested in featuring your event. Use our media advisory template to give media advance notice of your event.

If pictures or video are to be taken at the event, please be sure to post a sign at your event that indicates your photos may appear on the web. Please include the following text at the bottom of your sign:

*McCormick Care Foundation may use photographs or video or both (the "Images") taken of the participants at this event. By participating in this event, participants are deemed to grant the event organizers and McCormick Care Foundation irrevocable right and unrestricted permission to use and publish the Images of them, on a royalty free and unrestricted basis for any purpose authorized by McCormick Care Foundation, including website use and fundraising use. This grant includes a waiver of moral rights and the rights to modify and/or retouch the Images. Participants fully and without limitation release McCormick Care Foundation from any liability that may arise from the use of the Images. I agree and acknowledge that the Images are also subject to the Terms of Use in the McCormick Care Foundation website.*



---

## **Step 9:** ENJOY YOUR EVENT

Your event day has finally arrived! With your well-thought out planning in advance, make sure you take time to enjoy your event – *you deserve it!*



## **Step 10:** POST EVENT MANAGEMENT

Collect your funds and wrap up

Now that your event is over it's time to start wrapping up loose ends, pay outstanding invoices and submit the proceeds to McCormick Care Foundation.

Here are some items we suggest thinking about during your wrap up:

- Invoices/payments
- Final budget – the fun part, how much did you end up raising?
- Submit proceeds to McCormick Care Foundation within 60 days
- Tax receipts if applicable – speak with your McCormick Care Foundation Representative about this in advance of your event
- Evaluate your event with your committee
- Thank your committee
- Thank and acknowledge those who participated in or supported your event, let them know how much you appreciate their support. It's also a good idea to let them know how much your event raised.
- It's important to make your donors and volunteers feel part of your achievement. Your guests will appreciate knowing how their support helped McCormick Care Foundation. You can also provide more information on next year's event at the same time!
- Start planning for next year!

# ADDITIONAL RESOURCES

---

Learn more about tax receipting, in-kind donations, sponsorships and licenses and insurances.

We want to make sure you enjoy your fundraising event experience and want to help you along the way. We have included some sample letters/packages for your reference. Please feel free to use these templates to create your own letters/packages for your specific event. If you have any questions, please feel free to ask your McCormick Care Foundation Representative for advice and guidance and they will be happy to assist you.

Below is a list of all our available sample templates:

- Sponsorship
- Fundraising Letter
- Thank You Letter
- Action Plan
- Budget Plan

**Need more tips on how to fundraise?  
Ask your McCormick Care Foundation  
Representative!**

## THANKYOU!

McCormick Care Foundation truly appreciates that you share our goal: Enhancing Care and Enriching Lives. We move closer to this goal when we act as a community, and there's no better expression of community than an event.

An event brings a great number of people together, and together is the best way to make a difference in the lives of individuals living with dementia and their families in our community and beyond.

*We look forward to working with you.*

## POLICIES &



# GUIDELINES

---

It is important for you to know our Policies and Guidelines when planning for your event.

- Community fundraising event parameters will be reviewed for kind, type, activity, profit potential and McCormick Care Foundation involvement.
- Activity should generate a positive event image as well as raise awareness of the cause and McCormick Care Group.
- McCormick Care Foundation will incur no costs on behalf of the community event organizer.
- Funds flowing to McCormick Care Foundation through on-line registration or POS transactions will be considered part of your event's net donation. These funds cannot be transferred from McCormick Care Foundation to organizers to cover expenses.
- Ensure expenses are covered through event revenue; excluding on-line registration and POS transactions
- McCormick Care Foundation must provide final approval of all event materials containing our or McCormick Care Group, McCormick Dementia Services, or McCormick Home's logo or mention of particular programs prior to printing and/or distributing.
- McCormick Care Foundation's logo cannot be used without permission of the Foundation.
- Community event requirements involving licenses and fees must conform to government regulations and are the responsibility of the event organizers.
- All money, records and requests for donation receipts must be sent to McCormick Care Foundation within 90 days of the event.
- All donations will be accepted and processed in accordance with McCormick Care Foundation gift acceptance policies and administrative procedures.
- Charitable donation receipts will be issued in accordance with Canada Revenue Agency regulations.
- Where community event organizers wish to designate proceeds to a particular McCormick project, activity or area of research, McCormick Care Foundation will ensure funds are dispersed as per the organizer's designation.
- Ten per cent of designated donations support the highest priority needs at McCormick Care Group and help cover McCormick Care Foundation's costs of attracting and stewarding donors.
- McCormick Care Foundation is not in any way liable or responsible for any injury which may occur as a result of the event and a waiver to that effect must be signed by all participants and volunteers.