



SPECIAL EVENTS POLICIES AND PROCEDURES

McLaren Oakland Foundation staff must review and approve in writing any fundraising event or promotion intended to benefit McLaren Oakland Foundation prior to the event or any promotion of the event. Event organizers must agree in writing to abide by all policies and procedures pertaining to that event. References in these Policies and Procedures to “special events staff” shall mean the special events staff of McLaren Oakland Foundation.

I. PUBLICITY

Friends Raising Funds Event organizer(s) will establish a publicity/marketing plan for their event. Advertisement and promotion of the event is the sole responsibility of the Friends Raising Funds Event organizer. McLaren Oakland Foundation Friends Raising Funds approval committee must review all promotional materials (*e.g.*, brochures, advertisement, etc.) before printing; this approval process is coordinated through the McLaren Oakland Foundation special events staff. If the McLaren Oakland Foundation logo is to be used in publicity, the special events staff must approve any layout and design incorporating the logo prior to printing.

When naming the Institute in any and all event materials, we should be listed as McLaren Oakland Foundation.

An event name may NOT incorporate the name “McLaren Oakland Foundation as in “McLaren Oakland Swimathon.” McLaren Oakland Foundation may be identified as the beneficiary, but not the sponsor, of the event. For example, the event organizer MAY identify the event’s relationship with the Institute as “Smith School Swimathon, benefiting the McLaren Oakland Foundation”

II. MCLAREN OAKLAND FOUNDATION LOGO USAGE

The special events staff must approve the McLaren Oakland Foundation’s logo usage on printed materials for all fundraising events/or related programs. Specific standards for use of the logos will be available from the special events staff. Event organizers may only use McLaren Oakland Foundation’s name and logo for approved uses prior to and up to 30 days after the event. After 30 days, any use of the logo or name must be removed from all promotional materials (*e.g.*, websites) unless otherwise approved by special events staff.

III. DESIGNATION OF DONATION

The Friends Raising Funds event organizer(s) have full right to designate specific areas of established interest/programs to which their event proceeds will be directed at McLaren Oakland Foundation. The special events staff can provide suggestions of possible designations upon request. If your group prefers, you may make an unrestricted gift, in which case the McLaren Oakland Foundation will use the proceeds to meet needs identified by McLaren Oakland Foundation Leadership. A written statement describing the intended use of the funds should accompany the event proceeds when they are given to the Foundation. If such a statement is not received with the event proceeds, all funds will be considered to be an unrestricted gift.

IV. OBLIGATIONS AND CONTRACTS

Only an authorized development or public relations employee of the McLaren Oakland Foundation can enter into a contract on behalf of McLaren Oakland Foundation or obligate McLaren Oakland Foundation to pay for any service or item connected with the event.

V. CONDUCT AND DECORUM

McLaren Oakland Foundation mission: The purpose of the McLaren Oakland Foundation is to obtain funds through charitable giving, to administer those funds and to allocate them to McLaren Oakland and other appropriate not-for-profit. Generous donations are used for the purpose of enhancing patient care, health care research, providing health-related education and purchasing clinical equipment and building our facilities.

Each Friends Raising Funds Event shall be administered in a manner that is appropriate to the mission statement of the McLaren Oakland Foundation. No offensive or unlawful conduct shall be associated with any Friends Raising Funds Event. For purposes of these Policies and Procedures, offensive and unlawful behavior shall pertain to any conduct deemed offensive to the McLaren Oakland Foundation in light of the McLaren Oakland Foundation's mission statement and the fundraising purposes for which the Friends Raising Funds Event is conducted. The McLaren Oakland Foundation reserves the right to withdraw its endorsement of any Friends Raising Funds Events deemed offensive under the criteria above and to require immediate removal or termination of any use of the McLaren Oakland Foundation's name and logo. The McLaren Oakland Foundation also reserves the right to refuse any fundraising proceeds from Friends Raising Funds Events deemed inconsistent with the McLaren Oakland Foundation's Mission.

VI. SOLICITATION OF DONATIONS

Organizations that solicit funds for charitable purposes in Michigan are generally required to register with the Michigan Attorney General's Office prior to soliciting funds, and must also file certain reports with the Attorney General's Charitable Trust Division. The charitable solicitation registration must be renewed annually. Upon request, proof of such registration shall be provided to the McLaren Oakland Foundation.

VII. SOLICITATION OF CORPORATE DONATIONS

The special events staff must approve all solicitations of corporate gifts before the company is approached. This will avoid duplication of efforts and excessive request to any one potential donor.

VIII. EXPENSE AND REVENUE REPORT

Event organizers are solely responsible for funding and reimbursement of all expenses relating to their event. Within 60 days after the event, the organizer(s) must submit a revenue and expense statement to McLaren Oakland Foundation special events staff. A preliminary report may be submitted if final figures are not available.

Net proceeds from the event should be given to McLaren Oakland Foundation no more than 60 days after the event.

The IRS and the Michigan Attorney General's office monitor organizations which solicit funds for charities to ensure that funds received are utilized appropriately for the benefit of the charity in question. Your organization should strive to have at least two-thirds of the funds raised in connection with an event be "net" proceeds donated to McLaren Oakland Foundation. The IRS, Attorney General and other regulatory officials use this as a guide in monitoring groups for audits or other enforcement actions, although they are generally reasonable in recognizing that it can take a new event or group a period of time to achieve this objective.

IX. TAX DEDUCTIBILITY

McLaren Oakland Foundation cannot allow you to use its tax-exempt status or provide tax receipt(s) for any donations that are NOT directly received by McLaren Oakland Foundation, including checks written directly to event organizers, in-kind services from venues or donors, etc. McLaren Oakland Foundation can ONLY provide tax receipt letters to those donors who directly contribute to McLaren Oakland Foundation (*i.e.*, check made payable to McLaren Oakland Foundation, money order made payable to McLaren Oakland Foundation, cash given directly to McLaren Oakland Foundation or credit card accepted by McLaren Oakland Foundation).

Special events staff can write and mail letters to thank event participants and in-kind donors. However, these letters serve only as thank you notes, not tax receipts.

X. RAFFLES, MILLIONAIRE PARTIES, BINGOS

All raffles, Millionaire Parties, and Bingos **must be** licensed by the state charitable gaming division. Your group must be recognized as exempt from tax as a 501(c)(3) organization to apply for a license. Check with the special events staff if you are planning to have any drawing or contest to determine if you must apply for a raffle license.

The Charitable Gaming Division of Michigan is responsible for all charitable gaming licensing including raffles, millionaire parties, bingos, etc. Please visit their website at www.michigan.gov/cg or contact a Charitable Gaming Division representative at (517) 335-5780 for questions relating to any and all guidelines. Event organizers are solely responsible for compliance with any applicable laws and regulations regarding charitable gaming.

XI. BELOW – STATED VALUE WINNING BIDS AT AUCTION

Items are often purchased at charity auctions with winning bids of less than the value assigned to the item by the organization conducting the auction. In most cases, below-stated value winning bids should not give rise to any reporting obligations. The fact that the winning bid is below the stated value likely indicates only that the winning bidder happened to get a bargain.

Reporting obligations could arise, however, if the auction is conducted with the purpose of facilitating or enabling bargain purchases instead of with the purpose of maximizing charitable fundraising. Accordingly, it is important that all auctions be conducted with the purpose of maximizing auction proceeds. Event organizers are solely responsible for compliance with any applicable laws and regulations relating to auctions.

XII. AVAILABILITY OF MCLAREN OAKLAND FOUNDATION VOLUNTEERS

McLaren Oakland Foundation will assist in providing volunteer assistance for events if possible. Please discuss your need for volunteers with the special events staff as early as possible, so they can recruit the needed number of volunteers.

Also inform the staff well in advance if you want a representative of McLaren Oakland Foundation to attend in an official capacity (to welcome guests, thank participants, make any remarks or join in the ceremonies

XIII. USE OF FOUNDATION LIST

McLaren Oakland Foundation does NOT provide its donor mailing lists to any organization or individual for use in fundraising. Event organizers should have their own lists of potential contributors or participants. Please check with the special events staff regarding promotion of your event to McLaren Oakland Foundation supporters and any outside individuals and organizations.

XIV. YOUTH PARTICIPATION IN EVENTS

All events should be conducted with the safety of participants in mind, but special attention must be paid to the safety of any minors participating. All sporting events must meet the standards of the American Association of Pediatrics, www.aap.org. Event organizers are solely responsible for obtaining any necessary consents or permissions for minors participating in their event.

XV. ORGANIZATION, PERMITS AND LIQUOR LICENSE

The organization and execution of the fundraiser/event is the responsibility of the event organizer. Event organizers are solely responsible for obtaining any necessary permits or licenses necessary.

Any event at which beer, wine or other alcoholic beverages will be served must be held at a location or facility that has a liquor license. Check with the special events staff if you have any questions relating to hosting an event during which alcoholic beverages will be served.

XVI. LIABILITY INSURANCE

McLaren Oakland Foundation cannot provide insurance or liability coverage for your event. Each event will be required to have in place general liability and property insurance with reasonable coverage limits of liability as determined by taking into account the size, location, and nature of the event as determined by the special events staff.

In addition, at any event at which beer, wine or other alcoholic beverages will be served, the event must also have in place liability insurance with coverage applicable to the liability that may arise as a result of serving such beverages.

McLaren Oakland Foundation special events staff must approve in advance the limits of liability of insurance obtained with respect to any event at which alcoholic beverages will be served. Proof of all required insurance shall be submitted to the McLaren Oakland Foundation special events staff prior to the event.

XVII. INDEMNITY

The Friends Raising Funds events organizer(s) agrees to indemnify, defend and hold harmless the McLaren Oakland Foundation, and their respective affiliates, officers, employees, agents, representatives, contractors and licensees from and against all claims, losses, damages, liabilities and expenses, including reasonable attorney's fees, arising in connection with the Friends Raising Funds Events or arising out of or occasioned by any act or omission of Friends Raising Funds Event organizer(s), or its officers, partners, employees, volunteers, agents, contactors, licensees, guests, invitees, or attendees.

XVIII. WAIVER OF LIABILITY

IN CONSIDERATION OF THE MCLAREN OAKLAND FOUNDATION'S COOPERATION REGARDING THE EVENT, THE EVENT ORGANIZERS HEREBY WAIVE AND RELEASE ANY AND ALL RIGHTS, CLAIMS AND CAUSES OF ACTION OF ANY NATURE, DIRECT OR INDIRECT, RELATING TO THEIR EVENT AGAINST MCLAREN OAKLAND FOUNDATION.

XIX. SALE OF ITEMS

If you will be selling items at your event or through a promotion (e.g. t-shirts, greeting cards, candy, etc.) you will need a Michigan Sales Tax License. This license is obtained for a nominal fee from the Michigan Department of Treasury. Your obligation to file sales tax returns and turn over the sales tax collected are dependent upon the volume of sales over a given period of time. Event organizers are solely responsible for compliance with all applicable laws and regulations relating to the sale of items.

XX. POST – EVENT EVALUATION

The organizers of each event will agree as a condition to conducting the event, to meet or discuss via conference call, with members of the McLaren Oakland Foundation special events staff following the event, to generally review all aspects of the event, including the anticipated vs. actual results, effectiveness of event, feasibility/desirability of repeating event, any special opportunities or problems identified, as well as an analysis of the overall event. This includes completing a post-event revenue/expense report and submitting an annual report if the fundraising organization is an established 501(c)(3) group.

XXI. LEGAL REQUIREMENTS

While the special events staff is pleased to provide you with the general information included in the Special Events packet and to assist you in meeting the requirements for conducting a fundraising event, your organization is ultimately responsible for complying with any legal requirements associated with conducting a fundraiser. The McLaren Oakland Foundation and the special events staff encourages your group to obtain qualified professional assistance in meeting the legal requirements, and the information provided herein should not be viewed as a substitute for such assistance or as legal advice.