

## **GUIDELINES FOR CONDUCTING A SPECIAL EVENT BENEFITTING THE MARY KAY ASH CHARITABLE FOUNDATION**

Thank you for your interest in planning an event to benefit The Mary Kay Ash Charitable Foundation. We deeply appreciate your efforts to further the dual missions of the Foundation – to support women dealing with the side effects of cancer and its treatment, and to support those women affected by domestic violence. As you develop your event plan, we request that you adhere to the following guidelines. We ask that you provide as much information to us as possible prior to your fundraising event to maximize your success and to maintain the integrity of the Foundation and Mary Kay Ash's personal legacy.

- A. Review and Approval of Fundraising Plans.** Plans for your fundraising event must be reviewed by the Board and staff of The Mary Kay Ash Charitable Foundation. To gain approval for your planned fundraiser, please submit for review the following information **six weeks prior** to the first unit meeting announcements or distribution of promotional materials. Your fundraiser request should include the following:
1. A signed copy of this form, and a completed Fundraiser Information Form (attached).
  2. A written description and rationale for the event, including reasons for the type of event selected, sales force leadership, organizational structure, specific elements/activities and exact date(s) and time(s). (Fill in space provided on Fundraiser Information Form, and attach additional pages if necessary.)
  3. A comprehensive budget for the event to accompany your proposal, including printed materials, publicity, organizational costs, speakers and materials purchased through the Consultant Order Form, and related costs. (See logo usage guidelines below.)
  4. An event calendar to benchmark key completion dates for tasks, such as mailing invitations, contacting press, selling tickets – also including planned timeline for submitting proceeds, flyer/materials samples and photos. We recommend **photos need to be 300 kilobytes or more**.
  5. A specific method for record keeping and tracking of donors, sponsors, contributors, ticket-buyers, or auction bidders – indicating to us how you plan to account for the proceeds. (See discussion below regarding record keeping for gifts.)
  6. A list of prospective businesses, corporations or individuals that you or your committee is planning to solicit for underwriting or in-kind contributions for approval from the Foundation prior to solicitation.
  7. If you desire to use the Foundation's name and logo in connection with your fundraiser, please review the section discussing the use of the Foundation's name or logo below. In addition, prior to using the name or logo of the Foundation, you will need to provide the following information:
    - Check the logo request box above your signature on this form and indicate the electronic format you would prefer – jpeg, GIF or TIF.
    - **Provide the Foundation with a sample of the promotional item(s) which feature the Foundation's name, trademark and logo.**
    - **At the completion of the event, submit to the Foundation at least two samples of the materials for your event where the Foundation logo appeared.**

The Foundation will attempt to review your request to conduct a fundraiser and use the name and logo of the Foundation as quickly as possible. We will contact you when we have completed our review. Please allow at least **ten business days** after submitting your completed forms to the Foundation to complete its review process.

***Please note that fundraising events that are identical or similar to an event previously approved must still submit information required by these guidelines each time the event is held.***

- B. Sponsor of Event and Bank Accounts.** You or your unit is the sponsor of the fundraiser. The fundraiser is not sponsored by the Foundation or by Mary Kay Cosmetics Ltd. No

representation should be made indicating the Foundation or Mary Kay Cosmetics Ltd. is a sponsor.

Similarly, if you open a separate bank account for the event's expenses and proceeds, the bank account should be opened in the name and tax identification number of your event or key organizers – with key organizers as signatories (e.g. "Beyond Pink"), **not** The Mary Kay Ash Charitable Foundation or Mary Kay Cosmetics Ltd.

- C. Qualified Donations** Various Canada Revenue Agency rules govern the making of gifts for charitable purposes. In order to comply with these rules, it is important that adequate information be maintained concerning each donor and his or her gift. Donations of \$10 or more made to the Foundation will receive a tax receipt.

According to the Canada Revenue Agency, charities are not entitled to issue receipts for:

- Contributions of services (e.g. time, skills, effort) provided to the charity (services do not qualify as gifts);
- The purchase price of a lottery ticket or other chance to win a prize. If you are running draws or raffles at your fundraising events participants would not receive receipts for their purchase;
- Purchases of raffle tickets, event admission tickets, green fees, live and silent auction items;
- Donation of a gift certificate is not eligible for a tax receipt if the donor is the issuer of the gift certificate;
- Certain admission fees to events or to programs (e.g., fees for a golf tournament and day-care or nursery school facilities); or
- The payment of tuition fees (exceptions exist).

In addition, charities may not issue receipts:

- On behalf of another organization or charity; or
- In a name other than the name of the true donor.

- D. Non-Cash Gifts** For gifts-in-kind, the eligible amount of the gift cannot exceed the deemed fair market value of the item. An appraisal is recommended for items valued at \$1,000 or more.

Unfortunately, if we cannot determine the fair market value of the item then we are unable to write a receipt.

**E. Submission of Proceeds**

**When you submit proceeds from the event, make certain you have provided full information on the donors and participants so that the Foundation can comply with reporting requirements and add these donors to the Foundation's database. Please include name, address, telephone and e-mail address (where available) and contribution details for each donor, as well as Mary Kay affiliation – Independent Beauty Consultant (Consultant number, unit number, career path level), employee, retired employee, customer, or friend.**

If the Foundation is not the sole beneficiary of the fundraiser, please call the office to discuss steps to be taken. **Please note: The Foundation cannot issue charitable donation receipts for gifts made to the event name. Only cheques made directly to the "Mary Kay Ash Charitable Foundation" will receive charitable donation receipts.**

We strongly encourage all event organizers to **remit the proceeds from their event within 90 days** of the event taking place in order to ensure proper stewardship of donors. Additionally, under Canada Revenue Agency Canada guidelines, in order for gifts to be eligible for income tax receipting in any

given calendar year; **The Mary Kay Ash Charitable Foundation must have received the gift by the last business day of December; or a donation must be postmarked prior to December 31<sup>st</sup>.**

**F. Expenses**

**The Mary Kay Ash Charitable Foundation is not responsible for expenses.** Under no circumstances is the Mary Kay Ash Charitable Foundation able to offer funding or reimbursement for event expenses.

- G. Use of Foundation's Logo or Name.** You must first obtain authorization from the Foundation to use its name, trademarks and/or logo for items developed to promote the fundraiser. Promotional items include, but are not limited to, t-shirts, pens, bags, print advertising, tickets, flyers, brochures, and other informational materials. You may **not** use the Mary Kay Ash Charitable Foundation name, trademarks, and/or logo **unless** you receive prior approval as outlined above and contribute a minimum 25 per cent of the net proceeds (after expenses) to the Foundation.

\_\_\_\_\_The Organizer understands and agrees that the MKACF logo (a) may not be altered in any way, nor may it be sublicensed to any other person (b) may not be used in connection with any telemarketing or door-to-door solicitations, and/or (c) may not be used in conjunction with terminology that is contrary to the mission of MKACF.

\_\_\_\_\_The Organizer will submit to MKACF for approval all promotional materials for the event including, but not limited to, advertising, invitations, letters, brochures, flyers and press releases prior to production or distribution. All event materials should state that "Proceeds / A portion of the proceeds – benefit(s) MKACF."

- H. Designation** Please note that any amount donated can be designated to either to "End domestic violence" or "Support women living with cancer" or "Both."

- I. Foundation Donor List.** The Foundation donor list will not be shared or distributed externally.

- J. Foundation Staff.** Staff of the Foundation will not participate in the sale of any tickets to events or solicit event sponsorships.

- K. Proceeds of Sales** In the event that you would like to donate proceeds of your sales from, for example, the sale of a particular Mary Kay® product, we would issue a tax receipt for those donations of \$10 or more made to the Foundation.

**L. Licences**

The Mary Kay Ash Charitable Foundation will not sign any application of gaming and lottery licenses. Gaming and lotteries including bingos, gambling, raffles or games of chance often have special considerations that require permits and legal reporting that the MKACF will not be responsible for. Legally all raffles must be registered with your local municipality. There is a processing time of approximately 8-10 weeks to receive a raffle license and your prize cannot change afterwards. We recommend that instead, you hold a **Promotional Draw**. You can run a draw without acquiring a license, but you must offer the tickets for free, asking instead for a donation for the ticket.

- M. Disclaimer.** The Foundation will not be held legally responsible for any act incurred by the organizers of an event including but not restricted to, personal injury or death; damage to, theft of, or loss of personal, private, or community property; or for provision of trophies, monetary prizes, or other gift items promoted by event organizers.

- N. The Golden Rule Philosophy.** The Foundation will approve only fundraisers that demonstrate the Golden Rule Philosophy. A fundraiser should be just that – a fundraiser benefiting a specific charity or organization. A fundraiser should not be used as a device to

market the Mary Kay opportunity or share the marketing plan. You will want to keep The Golden Rule philosophy in mind when planning and conducting your fundraiser.

**Fundraising Event #** (for internal use only) \_\_\_\_\_

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(See reverse side **The Mary Kay Ash Charitable Foundation  
Fundraiser Information Form**

**(Please include your Consultant Number on all information you submit.)**

Phone: 905-858-0020 ext. 2643    marykaycares\_canada@mkcorp.com    FAX: (905) 858-8407

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**Name:** \_\_\_\_\_ **Consultant #:** \_\_\_\_\_

**Unit #:** \_\_\_\_\_  
(Primary Contact)

**Address:**

\_\_\_\_\_

**Phone number(s):** \_\_\_\_\_

**E-Mail:** \_\_\_\_\_

**Name(s):** \_\_\_\_\_ **Consultant #:** \_\_\_\_\_

**Unit #** \_\_\_\_\_

**Name(s):** \_\_\_\_\_ **Consultant #:** \_\_\_\_\_

**Unit #** \_\_\_\_\_

**Name(s):** \_\_\_\_\_ **Consultant #:** \_\_\_\_\_

**Unit #** \_\_\_\_\_

(Attach additional pages, if necessary.)

**Title of Event:** \_\_\_\_\_

**Description of Event:**

\_\_\_\_\_

(Attach additional page if necessary.)

\_\_\_\_\_

\_\_\_\_\_

**Proposed Date of Event:** \_\_\_\_\_

Is a timeline, action plan and/or itinerary available for this event? Yes \_\_\_ No \_\_\_

If yes, please include with your application

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**Location (facility) and address:** \_\_\_\_\_

**City, Province** \_\_\_\_\_

**Zip Code:** \_\_\_\_\_ **Facility Phone Number:** \_\_\_\_\_

**Indoor/Outdoor (circle one)**    **Rain Date:** \_\_\_\_\_

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Hours of Event: \_\_\_\_\_

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Anticipated attendance: \_\_\_\_\_ Anticipated revenue: (gross) \_\_\_\_\_  
(Attach detailed budget) Anticipated expenses: \_\_\_\_\_  
Anticipated Revenue: (net) \_\_\_\_\_

Funds for this fundraiser will be generated by:  
Ticket Sales/Entry Fee Raffle \_\_\_\_\_  
Silent Auction Donations \_\_\_\_\_  
Vendor Sales \_\_\_\_\_

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**Other event beneficiaries:** (Note: In order to receive authorization to use The Mary Kay Ash Charitable Foundation name, trademarks and/or logo, the Foundation requires a minimum contribution of 25 percent of the net proceeds.)

Organization: \_\_\_\_\_ Contact Name/Number: \_\_\_\_\_ % of  
proceeds \_\_\_\_\_

Organization: \_\_\_\_\_ Contact Name/Number: \_\_\_\_\_ % of  
proceeds \_\_\_\_\_

**Method(s) of fundraising (e.g. ticket sales, underwriting, auction, etc.)**

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**Marketing and Promotions:**

The Mary Kay Ash Charitable Foundation can play a complimentary role in planning your event, but typically the third party primarily plans third party events. If your event is open to the public we would be happy to list your event on our website. Unfortunately, due to our limited resources, we cannot often support these events as much as we'd like to. To help us determine your MKACF needs, please supply us with the following information:

How will the event be publicized (invitations, press releases, advertisements, PSA's, promotional flyer etc.)? Where will MKACF branding (logo) appear? Please attach any samples to your application:

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Will the media attend/cover the event? If so, please identify the media you anticipate will attend:

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Will you require any MKACF brochures?

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**Method of record keeping:**

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**By what date will the Foundation receive proceeds? (And in what form?)**

Date: \_\_\_\_\_ Projected Amount: \$ \_\_\_\_\_  
Cash: \$ \_\_\_\_\_  
Cheque(s): \$ \_\_\_\_\_  
Money order(s): \$ \_\_\_\_\_  
Other: \_\_\_\_\_

*\*If you are consolidating cash from a fundraiser, we request you do so using a money order. Please attach detailed gift information listing the donor, the amount and the type of gift to assist in our record keeping and "thank you" process.*

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**Method(s) of promotion and advertising. Describe materials and media.**

*Please attach draft versions of all copy, flyers, posters and promotional materials that will include The Mary Kay Ash Charitable Foundation and/or logo for official approval.*

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**How do you wish your funds to be distributed? (circle one)**

**Domestic Violence**

**Cancer**

**Both**

*All fundraising events must be consistent with the fundraising guidelines established by The Mary Kay Ash Charitable Foundation.*

***(Please return this signed document together with your completed Fundraiser Information Form and attachments to the Development Office for approval no later than six (6) weeks prior to distribution of your invitations or promotional items.)***

**All events must be approved annually.**

- I request permission to use The Mary Kay Ash Charitable Foundation Logo.
- Proposed samples are attached.
- I would prefer: \_\_\_jpeg; \_\_\_GIF; \_\_\_TIF;  
Resolution: \_\_\_high \_\_\_low \_\_\_doesn't matter

Please return this to:                   The Mary Kay Ash Charitable Foundation  
2020 Meadowvale Blvd.  
Mississauga, ON L5N 6Y2  
FAX: 905-858-8407

Name (Type or print clearly)	Consultant Number	
Signature	Event Title	Date
Signature of witness	Witness name	Date

*We recommend you contact your personal tax or legal advisor for details on regulations governing charities.*

For further information regarding general fundraiser guidelines, please refer to the Legalese Guidelines available under *Resources* on the MKOC<sup>SM</sup>.

For further information regarding fundraisers benefiting The Mary Kay Ash Charitable Foundation, please contact Dawn Gerry at (905) 858-0020 ext. 2643 or dawn.gerry@mkcorp.com; e-mail us at marykaycares\_canada@mkcorp.com.

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**DEVELOPMENT OFFICE USE ONLY**

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

Signature of Foundation official: \_\_\_\_\_

Reasons for not receiving approval:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Status/date: \_\_\_\_\_