



Our Mission:

Together, we create life-changing wishes for children with critical illnesses.

Introduction

Thank you for your interest in holding a fundraiser to benefit Make-A-Wish Montana. We appreciate your desire to help us grant the wishes of children with life-threatening medical conditions.

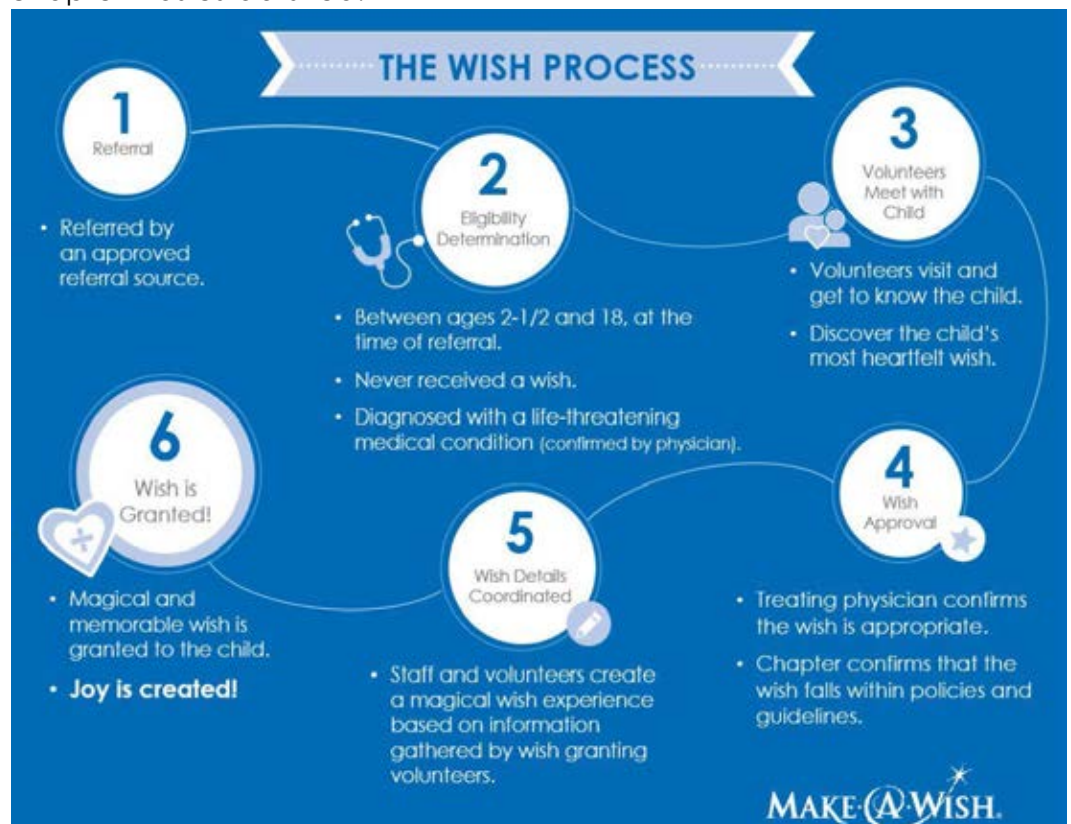
This guide is designed to walk you through the event process and to inform you what happens before, during and after an event. It also outlines the paperwork involved and answers many commonly asked questions.

About Make-A-Wish

Make-A-Wish was inspired by the love that family and friends had for a 7-year-old boy in Phoenix named Chris, who had leukemia but dreamed of becoming a police officer. Chris' family, friends and the Arizona Department of Public Safety made his wish come true, shortly before he passed away. Chris' mother and those who helped grant his wish created the Make-A-Wish Foundation in 1980, enabling his legacy to live on through more than 285,000 wishes that have been granted since that date, all across the country.

The Make-A-Wish Foundation is now the largest wish-granting charity in the world, with 62 chapters in the US and its territories. Make-A-Wish grants a wish, on average, every 34 minutes. The first wish in the state of Montana was granted in the summer of 1987. Since then, nearly 600 wishes have been granted in the state of Montana, and in 2015, the official Montana chapter was established.

Please take a moment to familiarize yourself with our mission and the process of how a wish is granted. Most likely you will be asked questions specific to Make-A-Wish Montana and we hope the following details are helpful. Our website also is a great resource to learn more about Make-A-Wish Montana and how we grant wishes.



Information

This guide is intended to help you structure a successful fundraiser in compliance with Make-A-Wish requirements. The *Special Event Proposal and License Agreement* (license agreement) form provided by the chapter must be approved by the chapter before you can begin to use the marks or raise money on our behalf. Before signing the license agreement, please review the following information carefully and let us know if you have any questions about the agreement, this guide, your proposed fundraiser or anything else.

Thank You!

We thank you in advance for considering Make-A-Wish Montana as your charity of choice. We look forward to working together to make your event the best possible. You are helping to make wishes come true!

Fundraiser Considerations

The success of any event is ultimately dependent upon how well the event was planned and how well that plan was executed. Great plans lead to great events, and conversely, poor plans lead to poor events.

When an organization, group or individual undertakes an event to benefit our chapter, that event becomes an extension of us in the community. Because of this, event planners must adhere to rules set forth by Make-A-Wish America, the Internal Revenue Service and the Better Business Bureau. It is because of these regulations that organizers must maintain regular contact with our office.

After consulting with our chapter, and before filling out the license agreement form, you should consider the following with respect to your proposed fundraiser:

- Determine what the event will be and choose an appropriate name;
- Select a date and location for the event;
- Set a realistic goal in terms of the dollar amount you will raise;
- Create an event budget, with an estimate of revenues and expenditures; and
- Determine how the funds will be raised (e.g. selling tickets, conducting a silent auction, obtaining sponsors, selling t-shirts, etc.).

Approval Process

Once you have determined the type of event you would like to host including all of the logistical details, you are ready to fill out the license agreement form. Once you have completed this paperwork, please return it to the chapter for approval. It will be reviewed by our Development Manager, who will contact you if there are any questions or concerns. If approved, the agreement will be signed on behalf of our chapter and a copy returned to you. Our goal is to make this process move quickly and we strive to provide a response within five business days of receiving the license agreement. ***Please note that you may not use the Make-A-Wish marks until we have approved, signed and returned the license agreement to you.***

You've Been Approved!

Once you receive your approved and signed license agreement, you are ready to get things moving. You will be responsible for your fundraiser from the day it is approved by the chapter until the day we receive the donation from you. Unless we expressly agree to the contrary, it will be up to you to obtain sponsors, participants, prizes, publicity, etc., and under no circumstances will the chapter be responsible for any costs associated with your event. Please remember to keep us apprised of your activities and to let us know if you have any questions about your obligations under the license agreement or this guide.



Event Organizer Checklist

✓	Items Needed BEFORE Event	Date Submitted
	event license agreement	
	publicity form	
	list of prospective corporate and local sponsors if you plan to solicit any	
	examples of publicity materials for review by chapter	
	Items Needed AFTER Event	
	funds raised should be turned into Make-A-Wish office within 30 days	
	log of all donors or participants for MAW database (include name, address, phone number, email and gift amount, if possible)	
	event financial statements	

Make-A-Wish Name and Logo Usage (Graphics Standards)

In addition to being a children's charity, Make-A-Wish is also a corporation. Like any other corporation – Coca-Cola®, McDonalds®, Ford®, etc. – Make-A-Wish has a registered name and logo and adheres to rules for the proper usage of that name and logo in marketing and publicity efforts. These rules are called graphic standards.

"Make-A-Wish," "Make-A-Wish Foundation," and the Make-A-Wish swirl-and-star logo (collectively, the marks) are federally registered trademarks owned by Make-A-Wish. Our chapter is licensed to use and sublicense the marks in our geographic territory. After your event is approved and you receive a signed license agreement back from us, you may use the marks in conjunction with your event, subject to terms and conditions contained in the license agreement and in this guide.

Because it is imperative that our marks always be used correctly, **any written collateral you plan to print, distribute or publish (including online) and any products you plan to create that contain the marks must be reviewed and approved by the chapter PRIOR to printing, distribution, publication or production.** This information can be emailed to Lea Hackey at lhackey@montana.wish.org. Our goal is to provide you with a prompt response, which you will receive within two business days of your submission.

Intentional misuse and failure to strictly adhere to the graphic standards of Make-A-Wish will result in the immediate revocation of your license agreement and your right to use our name in fundraising efforts.

When describing Make-A-Wish Montana and granting wishes, external entities are asked to use our full mission statement and refrain from the following:

- Please do not use the terms "terminally ill," "dying" or "last wish" when referring to our wish children. The appropriate expression is "children with life-threatening medical conditions."



Obtaining Sponsorships

If you are planning to approach companies or organizations to sponsor your event, there are two things you should keep in mind:

- Our chapter is not permitted to solicit donors outside our territory, which is the state of Montana.
- There are some local companies that provide a great deal of support to our chapter which have specifically asked not to be approached with additional requests regarding external fundraising events; it is important that we not inadvertently jeopardize these existing relationships.

For these reasons we ask that you consult with our chapter in advance about your list of potential sponsors. This will give us an opportunity to let you know whether it is okay for you to approach them or not.

Unacceptable Fundraising Methods

Make-A-Wish policies prohibit the following types of solicitation:

- Telemarketing
- Door-to-door
- Chain letters
- Use of vending machines or candy boxes
- Most online solicitations (contact chapter for specifics)

Acknowledgements

It is the responsibility of the event organizers to acknowledge any third party who participates in or otherwise supports your event. If you would like the chapter to send a letter thanking individuals for participating in your event, please provide us with their contact information and a brief description of their participation. It is important to understand, however, that our chapter is not permitted to provide tax advice. Event supporters and participants should contact their personal tax representative for guidance on such matters.

Cause-Related Marketing

If you are planning a "cause-related marketing" fundraiser – i.e., one in which the sale of a product or service triggers a donation to the chapter – there are specific rules about what information must be disclosed to potential purchasers at the time of solicitation.

It is not sufficient to advertise merely that “proceeds” or “net proceeds” will benefit the chapter because such phrases are too vague to allow a consumer to make an informed decision whether to participate or not. In accordance with standards established by the BBB Wise Giving Alliance, each solicitation made in conjunction with the sale of a product must clearly disclose, at the point of solicitation:

- The actual or anticipated portion of the purchase price that will benefit the chapter (e.g., \$___ or ___% of the purchase price)
- The duration of the campaign (e.g., the month of _____); and
- Any maximum or guaranteed minimum contribution (e.g., “with the guaranteed minimum contribution of \$___,” or “up to a maximum contribution of \$___”)

As a matter of policy, chapters are not allowed to participate in cause-related marketing initiatives involving the sale of any of the following items:

- Tobacco products
- Alcoholic beverages
- Firearms or other weapons designed to cause harm
- Pornographic or sexually oriented adult entertainment, goods or services



Failure to comply with these requirements can jeopardize our chapter’s good standing with the BBB Wise Giving Alliance, which is another reason that we require that all written collateral about your event be submitted to us for our prior approval. In addition, we may ask for a guaranteed minimum contribution if you plan to conduct a cause-related marketing fundraiser on our behalf.

Contribution Levels

Throughout the course of the year, dozens of individuals, groups and corporations undertake fundraising projects on behalf of our chapter. It is through the hard work and generous contributions of these people that we are able to continue to fund wishes of children in Montana.

Our chapter is constantly creating, organizing and funding wishes as well as working on events and donor correspondence. These endeavors fill most of the precious time that our full time staff and volunteers have, so it is not possible for our staff, board or volunteers to assist with each and every event. For that reason, our chapter has established event support guideline that states the level of involvement we can commit to a fundraising event based on your estimated contribution level.

There are specific reasons for having these guidelines:

- It frees up the time of the chapter staff to pursue other critical aspects of the chapter business, such as medical outreach, public awareness, and other areas of development.
- It rewards those parties who are willing to undertake the time and commitment required to successfully organize, manage and execute a large-scale fundraiser.
- It provides a motivation to ensure the event is as successful as it can be.

Event Support Guidelines

For external events with anticipated revenue up to \$2,500, we will provide:

- Publicity for the event (when applicable to do so)
 - Permission to use the Make-A-Wish® Montana logo
 - Donation tracking sheet *
 - Disposable banners *
 - Template for a press release

For external events with anticipated revenue greater than \$2,500 we will provide:

- Items listed above
- In addition:
 - Event shared on social media before event
 - Social media thank you post event

For external events with anticipated revenue greater than \$7,500 we will provide:

- Items listed above
- In addition:
 - Ability to become an Support-A-Wish partner

For external events with anticipated revenue greater than \$10,000 we will provide:

- Items listed above
- In addition:
 - Invite a wish family to attend the event or organize meet and greet after event (if available)
 - Assistance contacting media

For external events with anticipated revenue greater than \$15,000+ we will provide:

- Items listed above
- In addition:
 - All of the above plus one staff or board member to attend the event (if available)

Raffles

For external events that include a raffle or any game of chance, the event organizer is expected to obtain the necessary raffle permits for the event. Make-A-Wish Montana will not apply for raffle permits on behalf of a third party. There are various types of permits and applicable rules and regulations across the state and vary by city. Please check with your local officials to be sure you are following all permit laws. For more information about raffles you can contact the Montana Attorney General's Office.

Thank You!

Once again, thank you for your interest in hosting an external fundraising event on behalf of Make-A-Wish Montana. By giving through us, you are helping very deserving kids from all across Montana have their one true wish come true!



Please do not hesitate to contact our office with any questions, concerns or ideas. We look forward to working with you on your external event. Through partners like you we are able to raise awareness, increase referrals, and raise funds to grant wishes. You are an important part of the wish process!

Contact Information

Lea Hackey
Development Manager
Office: 406.259.9848 | Cell: 217.621.1089
lhackey@montana.wish.org



**SPECIAL EVENT PROPOSAL
AND LICENSE AGREEMENT**

The Make-A-Wish Foundation[®] of Montana (“Make-A-Wish”) appreciates your interest in holding a fundraising event to help us grant the wishes of children with life-threatening medical conditions. Please fill out this proposal form and indicate your acceptance of the terms and conditions herein by returning a signed copy to us. If the proposal is approved, we will send you a fully signed copy, at which time your license to use the Make-A-Wish[®] name and Marks will become effective.

Sponsor and Event Information

Sponsor: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: _____ E-mail: _____

Name of contact person: _____ Phone: _____

Date and location: _____

Briefly describe the Event: _____

What participation or resources, if any, do you request from Make-A-Wish? _____

Do you plan on publicizing the Event? ____ Yes ____ No [Note: If “yes,” please pay particular attention to paragraphs 4-6 below before signing this proposal.]

Budget Information

Will admission fee be charged? ____ Yes ____ No If so, how much? \$ _____

What % or amount of the fee will Make-A-Wish receive? _____

Will the Event generate other types of revenue and, if so, what % or amount of that revenue will Make-A-Wish receive? _____

Anticipated total <u>revenues</u> :	\$ _____
Anticipated total <u>expenses</u> :	\$ _____
Anticipated total <u>donation</u> to Make-A-Wish:	\$ _____

Terms and Conditions

1. Sponsor agrees to provide Make-A-Wish with all of the net proceeds from the Event, along with a written accounting of Event revenues and expenses (and supporting documentation for any expenses in excess of \$500), in a form acceptable to Make-A-Wish, within thirty (30) days after the Event. Make-A-Wish may audit the Event revenues and expenses, if necessary.

2. Make-A-Wish is a licensed chapter of the Make-A-Wish Foundation[®] of America, the owner of certain federally registered and common law trademarks, service marks and trade names including Make-A-Wish, Make-A-Wish Foundation and the swirl-and-star logo (collectively, the “Marks”). If (and only if) this proposal is approved by Make-A-Wish, Sponsor will be granted a non-exclusive license to use the Marks in connection with the Event, although only within the geographic territory served by our chapter, i.e., the state of Montana.

3. The term of the license granted hereunder shall be from the date Make-A-Wish approves Sponsor’s proposal until the conclusion of the Event; provided, however, that Make-A-Wish has the right to terminate the license if it determines, in its reasonable discretion, that the Event is or will likely be injurious to the Marks.

4. Any use of the Marks is subject to the prior written approval of Make-A-Wish. Accordingly, Sponsor agrees to submit to Make-A-Wish for approval – prior to the production, distribution, broadcast, or publication thereof – all printed materials, publicity releases and advertising relating to the Event that mentions Make-A-Wish or contains the Marks.

5. Sponsor understands and agrees that the Marks: (a) may not be altered in any way, nor may they 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 Make-A-Wish’s mission (including phrases like “terminal illnesses,” “dying children,” “last wishes,” etc.). Sponsor further acknowledges that, because its license to use the Marks is limited to the geographic territory served by our chapter, it may not solicit cash or in-kind donations from persons outside such territory, nor may it use the Marks on the Internet and/or in conjunction with any news wire services without Make-A-Wish’s prior written approval.

6. In accordance with standards adopted by the BBB Wise Giving Alliance, Sponsor agrees that any solicitations relating to the Event must specify at the point of solicitation, and in a manner acceptable to Make-A-Wish: (a) that Make-A-Wish is the benefiting organization; (b) the actual or anticipated portion of the purchase price that will benefit Make-A-Wish; (c) the duration of the campaign; and (d) any maximum or guaranteed minimum contribution amount.

7. In order to avoid inadvertently jeopardizing existing relationships between Make-A-Wish and its donors, Sponsor agrees to receive approval from Make-A-Wish before soliciting corporations, businesses, celebrities, sports teams, or individuals for cash or in-kind donations relating to the Event.
8. Sponsor represents to Make-A-Wish that: (a) it will comply with all applicable laws during the planning, promotion and conduct of the Event; (b) all necessary insurance, licenses and permits will be obtained and will be in force through the conclusion of the Event; (c) the Event will result in no cost or expense to Make-A-Wish whatsoever, unless expressly agreed in writing to the contrary; and (d) it will indemnify and hold Make-A-Wish harmless from any and all claims of any kind or nature whatsoever arising out of, or in any way related to, the Event.
9. Nothing in this document shall be construed to authorize Sponsor, or any of its employees or representatives, to act as an agent of Make-A-Wish. Thus, for example, Sponsor may not open a bank account in Make-A-Wish's name, nor may it endorse or attempt to negotiate any checks made payable to Make-A-Wish, all of which must be promptly forwarded to Make-A-Wish for processing.

WE ARE DEEPLY GRATEFUL TO YOU FOR PROPOSING THIS EVENT TO BENEFIT THE MAKE-A-WISH FOUNDATION. IT IS BECAUSE OF CARING PEOPLE LIKE YOU THAT WE HAVE BEEN ABLE TO BRING HOPE, STRENGTH AND JOY TO SO MANY SPECIAL CHILDREN IN THIS AREA OVER THE YEARS. THANKS FOR HELPING US MAKE WISHES COME TRUE!

[Note: This Special Event Proposal and License Agreement will not become effective unless and until it is approved by Make-A-Wish, as evidenced by the signature of an authorized Make-A-Wish representative below.]

PROPOSED BY:

APPROVED BY:

*Signature of authorized representative
of Sponsor*

*Signature of authorized representative
of Make-A-Wish Foundation*

Print name

Print name

Title

Title

Date

Date



EVENT INFORMATION FOR PUBLICITY PURPOSES

If applicable, we would be happy to add your event to our online calendar and to help promote it on our website (www.montana.wish.org) and social media channels.

Please provide the following information:

Event name: _____

Date(s): _____ Time: _____

Location (include address): _____

Details: _____

Ticket Information: _____

Who to contact for more information:

Name: _____

Phone: _____

Email: _____

Any additional information: _____

I have a picture, poster or logo I would like included. No Enclosed