



ALASKA & WASHINGTON CHAPTER

# External Event Fundraising Packet

This packet will help you structure a successful fundraiser within Make-A-Wish Foundation® guidelines. The enclosed contract and budget forms must be approved by the Make-A-Wish Foundation® of Alaska & Washington before you can begin to use our name or raise money on our behalf.

Thank you for helping *share the power of a wish®!*



## Fundraising Packet

Thank you for your interest in holding a special event for the Make-A-Wish Foundation® of Alaska & Washington (the "Chapter"). We appreciate your desire to help our very special children.

**The Make-A-Wish Foundation® was inspired in 1980 by the love that a family and friends had for a seven-year-old Phoenix boy named Chris, who had leukemia. Chris dreamed of becoming a police officer, and his family, friends and the State Highway Patrol made his wish come true – just four days before he passed away. Chris' mother and those who helped grant his wish created the Make-A-Wish Foundation® in his memory, enabling his legacy to live on in the more than 197,675 wishes that have been granted since.**

The Chapter is held to the highest legal and ethical standards of fundraising and we are governed by policies established by our national organization, the Make-A-Wish Foundation® of America (the "Foundation"). We also adhere to the principles of various watchdog agencies, including the Better Business Bureau (BBB) Wise Giving Alliance, which you are required to follow if you want to use the Make-A-Wish® name. In completing this form and planning your fundraiser, there are some rules that you are required to follow. Please review the following information carefully.

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## Approval Process

Once you complete the enclosed contract and budget forms, please submit them to the Chapter as soon as possible. They will be reviewed by the Vice President of Development and Communications and/or Development Officer, who will call you with any questions. **We promise to make this process move quickly and we will provide a response within 2 weeks of receiving the forms.** You may not use the Make-A-Wish Marks (as defined herein) until we have approved your event licensing agreement.

## Make-A-Wish Foundation® of America

Foundation is the national organization for all Make-A-Wish chapters throughout the United States, and may become involved in any fundraising involving national celebrities or multiple state fundraising. In these cases, additional approval may be required from Foundation.

Foundation owns certain federally registered and common law trademarks, service marks and trade names including Make-A-Wish, Make-A-Wish Foundation and the Make-A-Wish swirl-and-star logo (collectively, the "Make-A-Wish Marks"). Once your fundraiser is approved, you may then use the Make-A-Wish Marks, subject to the terms and conditions set forth herein.

## Using the Make-A-Wish® Name

Once the fundraiser has been approved, we will send you the Make-A-Wish logo.

Rules for using the Make-A-Wish logo:

- Our logo appears at the right. It is in a typeface developed especially for the Make-A-Wish Foundation and must be used as it appears.
- The name of the chapter may be used in Futura (MAC)/Century Gothic (PC) or New Century Schoolbook typeface
- The logo must never be used in the title of the event or within a sentence; the Chapter name should be typed. The logo must stand separately.
- Any products you develop for your fundraiser which incorporate the Make-A-Wish logo (such as mugs or t-shirts) must be approved by the Chapter.



Rules for using the Make-A-Wish name/mark:

- When using "Make-A-Wish" or "Make-A-Wish Foundation" in a headline, the trademark symbol (®) must follow the mark, superscripted, and one font smaller.
- When using any of our marks (including "Make-A-Wish" and "Make-A-Wish Foundation"), the trademark symbol (®) must appear after the mark, superscripted, in the first reference per body of text.
- The words "Make," "A," and "Wish" must all be capitalized and separated by hyphens.
- "Make-A-Wish" should be used only as an adjective – never as a noun, as the name of the organization, or as a verb phrase in a sentence. Please use the "Make-A-Wish Foundation" as the noun form.

**Any information you distribute, publish or send out using any of the Make-A-Wish Marks, including advertisements and press releases, must be reviewed by the Chapter before it goes out.** This information can be faxed or emailed back to us and, once again, we promise a quick response.

## Language to Use

Please refrain from using terms that are contrary to our mission, such as “terminally ill”, “dying”, or “last wish” when referring to our wish children. The appropriate expression is “children with life-threatening medical conditions”. This is not just the expression we use, but also the accurate and complete description of the population we serve. Of course, our organization exists to serve these kids and their families and we are always careful to use language that is sensitive to them. Many of the children for whom we have fulfilled wishes have overcome or are on their way to overcoming their medical conditions – we like to think that perhaps their wish has had a positive impact on their well-being. Your support provides these children with hope and something exciting and positive to look forward to during a time that is often cluttered with worry and uncertainty.

### Language to Use in Advertising

The BBB Wise Giving Alliance has established standards as to how you must indicate your fundraiser is benefiting the Chapter.

Each advertisement that states or implies that the Chapter will benefit from the sale of products or services (i.e., cause-related marketing) must clearly disclose how the Chapter benefits. Such promotions must disclose, at the point of solicitation:

- The actual or anticipated portion of the purchase price that will benefit the Chapter (e.g., 5 cents of every dollar will be donated to the Chapter),
- The duration of the campaign (e.g., the month of October),
- Any maximum or guaranteed minimum contribution amount (e.g., up to a maximum of \$200,000).

## Fundraising Methods

### Getting Sponsorships for Your Fundraiser

Because we may already have relationships with certain companies or organizations, if you are planning to approach companies or organizations to get donations for your fundraiser, please let us know who are planning to approach before you make the ask. We may also have recommendations on those who might or might not be good to approach. There are some companies in our territory who already provide great support the Chapter and they have asked that they not be approached with requests from those doing external fundraisers. Because these companies do so much for us, we must be careful about “how many times we go to the well.” Therefore, we cannot ask these companies to provide something for your fundraiser and we ask that you do not go to these companies with requests for donations of any kind. In any case, please contact the Chapter before approaching potential donors.

*Please don't put these relationships at risk for us!*

**Additionally, we must be careful in approaching any company outside the counties our Chapter serves.** There are Make-A-Wish chapters all across the country and we want to be sure we are not infringing on any other chapter's donor and/or territory. The Chapter is legally prohibited from approaching donors outside of its territory.

## Unacceptable Fundraising Methods

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

- Telemarketing
- Door-to-door
- Most Online Donations (contact the Chapter for specifics)
- Use of vending machines or candy boxes

**\*\*\*Any proposals using these methods of fundraising will be declined\*\*\***

## Raffles

The Chapter is not responsible for raffles hosted by external fundraisers. Individual states have specific rules about raffles. Usually, raffles require a license/permit through your local Sheriff's Office and prizes may be subject to a federal income tax. It is your responsibility to investigate rules and regulations in your area.

## Expected Minimum Donation

We appreciate the hard work that goes into your organization's fundraising efforts. Therefore, we strive to provide the support and resources needed to make your event a success. However, because of our limited resources, we hope that each external event will raise **\$2,000+**. We are still happy to discuss and plan fundraising at any donation level.

If you are planning a cause-related marketing fundraiser—one in which an individual or company will make sales or profit with a portion of the proceeds going to the Chapter—we may ask for a guaranteed minimum donation.

# RESOURCES & RESPONSIBILITIES

## Your Responsibilities

You will be responsible for your fundraiser from inception to the day the check is issued to the Chapter. It is your job to obtain the donors, the publicity, the prizes, etc. The Chapter cannot be held responsible for any costs associated with your event. Please remember to keep the Chapter apprised of your activities, and contact the Chapter for any approval for publicity.

## Resources Available To You

We are standing by to answer your questions and provide support where we can, but please remember that our resources are very limited. We may be able to provide services subject to availability and commitment level. This includes media resources, staff and volunteer support and consignment items for purchase.

## Make-A-Wish Participation Guidelines for Support

To support your effort while balancing staff resources, the Foundation is able to provide varying levels of assistance based on the level of benefit to the Foundation.

### *Guaranteed Donation less than \$2,000:*

- Because of limited staff resources, regrettably, we are unable to license cause-marketing partnerships that raise less than \$2,000

### *Guaranteed Donation of \$2,000 or more:*

- Use of the chapter-specific Make-A-Wish logo (ALL uses of the name or logo must be approved before printing or public use)
- Make-A-Wish confirmation letter to support your efforts
- Marketing material support, such as newsletters, brochures, and banner
- Make-A-Wish representative to speak at an event associated with promotion

### *Guaranteed Donation of \$5,000 or more:*

- Items above, plus use of Make-A-Wish name and/or logo in broadcast media
- Listing on the events page of the chapter Web site
- Wish plaque commemorating your company's fundraising achievement
- Make-A-Wish representative to visit and share details and photos from the adopted wish experience

### *Guaranteed Donation of \$10,000 or more:*

- Items above, plus wish child/family invited to attend an event associated with promotion (participation not guaranteed, 30-day minimum notice required)
- Up to two Make-A-Wish volunteers to help at a single event associated with promotion
- Listing on the home page and events page of the chapter Web site
- Collaboration with staff to issue one press release, providing that the promotion falls within a mutually agreeable media window

## **ACKNOWLEDGEMENTS**

### Your Responsibilities

It is your responsibility to acknowledge any 3<sup>rd</sup> party donors who contribute to your event. If you would like the Chapter to send a 'Thank You Acknowledgement' letter to 3<sup>rd</sup> party participants in your event, you must submit the donor's name and address to the Chapter following the event.

The Chapter does not provide tax advice. Donors and 3<sup>rd</sup> party participants should contact their personal tax representatives for guidance.

## FORMS & CONTACTS

Please complete the budget and event forms and fax to the appropriate office and contact.

### Washington

Phone: 206.623.5300 | 800.304.WISH  
Fax: 206.623.5333  
Email: [dayna@nwwishes.org](mailto:dayna@nwwishes.org)  
Contact: Dayna Russell, Individual Giving Manager

### Alaska

Phone: 907.258.9474 | 877.510.WISH  
Fax: 907.258.9475  
Email: [nicole@nwwishes.org](mailto:nicole@nwwishes.org)  
Contact: Nicole Sheldon, Regional Director

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**The Make-A-Wish Foundation® grants the wishes of children  
with life-threatening medical conditions to enrich  
the human experience with hope, strength and joy.**

**Make-A-Wish Foundation®**  
**of Alaska & Washington**  
 811 First Ave, Suite 520  
 Seattle, WA 98104  
 206 623 5300  
 206 623 5333 fax  
 www.nwwishes.org



## BUDGET

Please complete this budget and submit with your Special Event Proposal

Expenses	Dollar Amount	Income	Dollar Amount
Supplies		Ticket Sales/ Entry Fees	
Security		Pledges (ex: walk-a-thon)	
Postage & Shipping		Sponsorships	
Equipment Rental		Raffle Sales (Drawing)	
Entertainment		Auction	
Awards & Gifts		Consignment Items (from MAW)	
Insurance		% of Proceeds (ex: \$1/ticket sold)	
Cost of Goods Sold		Sale of Goods (ex: bake sale/tshirts)	
Travel			
Advertising			
Printing & Signage			
Decorations			
Facility Rental			
Food/Beverage			
Other			
<b>Total Expenses</b>		<b>Total Income</b>	
<b>Total Income minus Total Expenses = Net Proceeds</b>			
<b>Total Anticipated donation to Make-A-Wish Foundation® of Alaska &amp; Washington</b>			

Make-A-Wish Foundation®  
of Alaska & Washington  
811 First Ave, Suite 520  
Seattle, WA 98104  
206 623 5300  
206 623 5333 fax  
www.nwwishes.org



**SPECIAL EVENT PROPOSAL  
AND LICENSE AGREEMENT**

The Make-A-Wish Foundation® of Alaska & Washington ("Make-A-Wish") appreciates your interest in holding a fund-raising 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: \_\_\_\_\_

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 revenues: \$ \_\_\_\_\_

Anticipated total expenses: \$ \_\_\_\_\_

Anticipated total donation 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 of Alaska & Washington 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.
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 (including via the Internet).
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® OF ALASKA & WASHINGTON. 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® of Alaska & Washington*

\_\_\_\_\_  
Print name

\_\_\_\_\_  
Print name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date