



Fundraising Event & Campaign HANDBOOK

This packet will help you structure a successful fundraiser within
Make-A-Wish guidelines.

The enclosed agreement must be approved by
Make-A-Wish Greater Los Angeles
before you can begin to use our name or raise money on our behalf.

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

Thank You

Thank you for your interest in holding a fundraising event and/or campaign for the Make-A-Wish® Greater Los Angeles. We appreciate your desire to help our organization and the children we serve!

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 in order to use the Make-A-Wish® name. In completing this form and planning your fundraiser, there are some rules that you must follow. **Please review the following information carefully.**



Make-A-Wish® History

Make-A-Wish® 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 240,000 wishes that have been granted for over 31 years.

About Make-A-Wish® Greater Los Angeles

Make-A-Wish Greater Los Angeles grants the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy. The Foundation serves children in the Greater Los Angeles area. The Foundation's revenue is derived from individual contributions, grants, bequests, memorials, fundraisers organized internally or fundraisers organized by third parties on behalf of the Foundation.

Founded in 1983, Make-A-Wish Greater Los Angeles has granted the wishes of more than 8,500 children fighting illnesses such as cancer, pediatric AIDS, cystic fibrosis, Duchene's muscular dystrophy and heart disease. A wish granted creates a memorable experience for a child fighting a life-threatening medical condition and gives him or her something positive to think about instead of medical treatments and hospital visits. We are proud to say that 70% of our kids live to adulthood, and it's thanks in part of the *power of a wish®*.

Recent wishes include visiting *Walt Disney World®* Resort, taking family vacations, receiving a computer, having bedrooms redecorated and meeting celebrities including the President of the United States, and many more. The average cost of a wish in Greater Los Angeles is \$8,000, but can exceed \$20,000 or more.

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Planning Your Event

Events benefiting the Foundation must follow the rules set forth by the Internal Revenue Service, the Better Business Bureau and are detailed in our Special Event Proposal and License Agreement. Therefore, the Foundation requires that event organizers maintain regular contact with the Foundation.

The following steps are helpful hints for the basic process you will want to follow when planning and hosting an event.

1. Form a planning committee

The commitment and excitement of the people who plan and organize an event has a direct relation to the success of your event.

2. Brainstorm ideas

Get creative! Try to think outside of the box and have your friends and family help pitch ideas as well!

3. Be sure you have chosen the “right” event

The type of event you choose should fit the size, interest, talent, goals and availability of your committee.

4. Be sure to review all guidelines

After choosing your event, make sure to review and understand all guidelines, terms and conditions set forth by the Foundation in the Special Events Proposal and Licensing Agreement.

5. Establish goals

Come up with realistic and measurable financial goals.

6. Plan a budget

Sit down and look at your expenses for the event. The more you can keep your expenses down, the higher your total donation.



7. Register your event

Any fundraising activity benefiting Make-A-Wish Greater Los Angeles must be approved by the Foundation. The Special Events Proposal and Licensing Agreement Form **MUST** be completed and submitted to the Foundation for approval no less than 60 days prior to the proposed event date for approval.

8. How will you publicize your event?

For a successful event, you must get the word out to your target audience. Do you have a list of your client's/supporter's e-mail addresses?

Make sure to get ALL promotional material approved by the Foundation before distribution and advertising (this includes, but is not limited to flyers, tickets, posters, Web pages, etc.).

9. Have a successful event

On event day have fun and enjoy your hard work. Your event is helping to make wishes come true!

10. Send funds to the Foundation

All funds must be submitted to the Foundation within 30 days of your event.

11. Thank your participants!

Acknowledging your participants is one of the most important parts of your event. Let everyone know how much you appreciate their support!

Language to Use in Advertising

The Better Business Bureau has established guidelines for indicating a fundraiser is benefiting Make-A-Wish.



Please follow these rules when promoting your event:

How much is being donated?	Here is how to say it:
ALL of the money collected at the event is going DIRECTLY to Make-A-Wish	"All of the proceeds benefit Make-A-Wish Greater Los Angeles"
All of the money minus the cost to hold the event is going DIRECTLY to Make-A-Wish	"Net proceeds to benefit Make-A-Wish Greater Los Angeles"
If a specific dollar amount on the purchase of a product is going to Make-A-Wish, you must state the dollar amount.	"For every necklace sold, \$3 will go to Make-A-Wish Greater Los Angeles"
If a percentage of the proceeds are going to Make-A-Wish, you must state the percentage.	"25 percent of proceeds will benefit Make-A-Wish Greater Los Angeles"

Regardless how much is being donated to Make-A-Wish, if your promotion occurs during a specific time period, that should be indicated. For example: *For every sale between Jan. 1 and Feb. 28, 2015.*

Boilerplate description of Make-A-Wish: the following language should be used:

Make-A-Wish grants wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy. Founded in 1980 when a group of caring volunteers helped a young boy fulfill his dream of becoming a police officer, Make-A-Wish is one of the world's leading children's charities, with 61 chapters in the United States and its territories. With the help of generous donors and nearly 25,000 volunteers, Make-A-Wish grants a wish every 38 minutes and has granted more than 240,000 wishes in the United States since its inception. For more information about Make-A-Wish, visit la.wish.org and discover how you can share the power of a wish®.

Use of the logo and brand name

Please use care with the Make-A-Wish® name and logo in all materials so that we can maintain a strong brand. **Send all promotional materials to your Make-A-Wish contact for approval before printing.**

Please note that “Make-A-Wish” is spelled with a capital “A” and with hyphens (not “Make a Wish”).
 Incorrect: Make a Wish Correct: Make-A-Wish

It should be used as an ADJECTIVE or a NOUN, not a verb:

Incorrect: Come help make a wish come true. (used as a verb)

Correct: Thank you for supporting Make-A-Wish. (used as a noun)

Correct: Thank you for supporting the Make-A-Wish mission. (used as an adj.)

Please do not alter our logo or name by customizing it to your specific event. For example, don't change it to “Bake-A-Wish” if you're having a bake sale.

Logo use

Use of the Make-A-Wish logo is by approval only. Make-A-Wish Greater Los Angeles will send you a logo for use IF you meet the minimum fundraising criteria outlined on page 10 of this packet.



Once you are given the Make-A-Wish Greater Los Angeles logo, keep the area around it clear of all type, photos, illustrations, or other graphic elements. These elements should not be placed closer to the logotype than the clear space area shown here. The logotype should always appear on a clear and uncluttered layout. It may not be placed on a patterned or complex background.

Avoid use of our national logo. Use our chapter-specific logo only IF sent by local Make-A-Wish staff.



Our mission is to grant the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy.

Never use words such as “terminally ill” or “dying.” as these labels can instill a sense of defeat and can be counterproductive as our wish kids fight to overcome their conditions. Many of these children are able to beat their illnesses, and it is important to keep a positive mindset! This is the most common misconception about Make-A-Wish, so when you are representing us in the community, please help us correct it.

Guidelines for Make-A-Wish Greater Los Angeles External Event Partners

As you begin to plan your event please be sure to read over the commonly asked questions and answers below. They serve as guidelines and will help you stay within the Terms and Conditions of the Special Event Proposal and License Agreement and will aid in having a successful event.

Q. Do I have to fill out a form to hold a fundraiser for the Foundation?

- A. Any fundraising activity benefitting the Foundation must be approved by the Foundation. The Special Event Proposal and License Agreement (enclosed) must be completed and returned to the Foundation no less than 60 days before the proposed event. **Groups, organizations and individuals may not move forward with event planning or advertising using the Foundation's name prior to approval.**



Q. Are there any events I can't hold?

- A. Events should fit the mission and convey the appropriate image of Make-A-Wish Greater Los Angeles. Tobacco or other products* deemed harmful to children may not be promoted alongside or in conjunction with the Foundation.
*events including alcohol require Make-A-Wish special approval.

Q. What portion of the event proceeds do I have to give to the Foundation?

- A. The Foundation requires that 100% of the net proceeds (total event revenue minus event expenses) be donated to the Foundation. Please see the following question that outlines the exception to this policy. ***Please review #1 under Terms and Conditions of the Special Event Proposal and License Agreement.**

Q. Can I split the money I raise between the Make-A-Wish and another charity or group?

- A. When the proceeds from an event will be shared among the Foundation and other organizations, the Foundation must be advised when the event organizer fills out the Special Event Proposal and License Agreement. Other organizations **cannot** be added to the event after the Special Event Proposal and License Agreement has been signed by Make-A-Wish Greater Los Angeles.

Q. How much support can I expect from the Foundation?

- A. Support for your event that you can expect from Make-A-Wish Greater Los Angeles is outlined in the Foundation's Revenue Guidelines for External Event Support (enclosed).

Make-A-Wish Greater Los Angeles cannot:

- o Provide funding or reimbursement for expenses.
- o Provide mailing lists of donors, vendors, board members and other affiliated constituencies.
- o Guarantee attendance of employees, wish kids or board members at the event. (Please see the Revenue Guidelines for External Event Support.)
- o Provide insurance for your event.
- o Act as the primary contact or organizer for your event.

Q. Can I use the Foundation's logo?

A. To gain use of the Make-A-Wish Greater Los Angeles logo, you must have an anticipated donation amount of at least \$8,000 for your event. (Please review the Revenue Guidelines for External Event Support on pg 10) Furthermore, the Foundation **MUST APPROVE** all uses of the logo in advance of its reproduction, printing or distribution. ***Please review #5 and #6 under Terms and Conditions of the Special Event Proposal and License Agreement.**



Q. Are there any rules about how I name my event?

A. In naming your event, Make-A-Wish Greater Los Angeles should not be used in the title but rather listed as the beneficiary of the event. For example, organizers should not refer to the event as the "Make-A-Wish Greater Los Angeles Golf Tournament." Instead, it should be promoted as the "Golf Tournament to benefit Make-A-Wish Greater Los Angeles."

Q. Does the Foundation have any rules about what to disclose on collateral?

A. When publicizing your event or selling tickets, you must clearly disclose how the Foundation will benefit in accordance with Better Business Bureau standards.

***Please review #6 under Terms and Conditions of the Special Event Proposal and License Agreement.**

Q. Can the Foundation share its lists of donors/supporters with me?

A. The Foundation does not release its proprietary mailing lists to third party organizations. Additionally, door-to-door sales and telephone soliciting is not permitted.

***Please review #5 under Terms and Conditions of the Special Event Proposal and License Agreement.**

Q. Will the Foundation help me with permits and insurance?

A. Events must comply with all federal, state and local laws governing charitable fundraising and gift reporting. The event organizer is responsible for obtaining all necessary permits and clearances. The event organizer must have appropriate insurance coverage in place.



Q. Are there any rules about who I can solicit gifts or items from?

A. If an organization plans to solicit contributions, sponsorship or in-kind gifts from businesses, the list of potential business sponsors must be reviewed and approved by the Foundation before any donation requests are made. Please remember that many local organizations have long standing histories of involvement with the Foundation.

Q. How soon after my event do I have to turn in the proceeds?

A. The sponsoring organization must submit event proceeds to Make-A-Wish Greater Los Angeles within **30 days** of the event.

Q. Do I have to show the Foundation any financial documentation or records?

A. The Foundation reserves the right to review all fundraising records upon completion of the fundraiser or at any time during the fundraising activity as deemed necessary by the Foundation. Under no circumstances may an individual or corporation keep any portion of the proceeds as profit or compensation for organizing the event.

***Please review #1 under Terms and Conditions of the Special Event Proposal and License Agreement.**

Q. Can I use this year's license agreement for next year or another event?

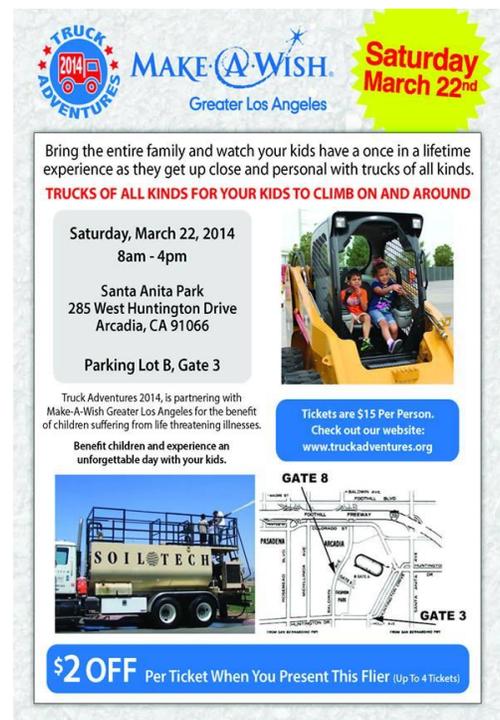
A. Event organizers must seek approval from Make-A-Wish Greater Los Angeles to repeat events in each succeeding year. Licensing agreements are only good for the event and timeframe outlined in each individual agreement and expire at the conclusion of the event or upon the decision of the Foundation. Annual events are common; however, paperwork must be filled out every year.

Q. Can I hold a raffle as part of my fundraising efforts?

A. The Foundation adheres to all federal and state regulations regarding charitable gaming. Each state has its own rules and regulations surrounding such activities. It is your responsibility to obtain documentation or licensing if you plan to hold a raffle and provide a copy of this document to the Foundation.

Q. I am excited to get started, but I still have questions. Who do I contact?

A. If you have follow up questions or general inquiries, please contact Vanessa Petersen at (310) 788-9474 x101 or vpetersen@la.wish.org.



Revenue Guidelines for External Event Support

Make-A-Wish Greater Los Angeles is very grateful for your generosity and efforts in raising funds and awareness for our wish children. To best support you *and* to continue to direct our resources to granting wishes, the Foundation is able to provide the following benefits based on your level of fundraising.

The Foundation requires a minimum \$1,000 guaranteed donation for third party-sponsored fundraising activities*. Please note that the Foundation will make every effort to support your event to help surpass the fundraising levels below, but this cannot be guaranteed.

Support Level & Benefits

\$1,000	<ul style="list-style-type: none"> • Use of Make-A-Wish® name on print promotional materials such as posters, flyers, advertisements, etc.**
\$2,500	<ul style="list-style-type: none"> • Items noted above • Endorsement letter
\$5,000	<ul style="list-style-type: none"> • Items noted above • Recognition in social media • 50 Make-A-Wish printed materials
\$8,000	<ul style="list-style-type: none"> • Items noted above • Use of a wish child photo and story • Posting of event on Make-A-Wish Greater Los Angeles website • Use of Make-A-Wish logo on print promotional materials such as posters, flyers, advertisements, etc.**
\$10,000	<ul style="list-style-type: none"> • Items noted above • A Make-A-Wish representative present at your event or check presentation • Inclusion in on-line newsletter, if timing permits
\$15,000+	<ul style="list-style-type: none"> • Items noted above • One press release distributed to Make-A-Wish Greater Los Angeles's media list • Either pre- or post-event (depending on your preference) • Opportunity is dependent on the Foundation's outreach calendar • Must have minimum one month's notice • Volunteers at your event to lend support.

PLEASE NOTE:

*These revenue guidelines do not apply to events organized via Kids For Wish Kids® or Wishmakers On Campus® programs.

** The Foundation **MUST APPROVE** all uses of its name and logo in advance of its reproduction, printing or distribution. Please see #4 under Terms and Conditions on the Special License Agreement.

Because the Foundation respects the privacy of its donors, the Foundation does not share its mailing list with anyone and cannot send mailings on behalf of your company or organization's event to its database of constituents. The Foundation will not be able to solicit sponsorships or in-kind donations for third-party events.

EVENT/CAMPAIGN PROPOSAL AND LICENSE AGREEMENT

Make-A-Wish® Greater Los Angeles ("Make-A-Wish") appreciates your interest in holding a fundraising event/campaign 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/or Marks will become effective.

Event/Campaign and Contact Information:

Name of contact person: _____

Company (if applicable): _____

Contact Address: _____

Business Phone: _____ Cell phone: _____

E-mail: _____ Fax: _____

How would you describe this fundraising opportunity?

- Event (Party/Golf Tournament/Casino Night etc)
- Cause Marketing Campaign (% or portion of sales)
- Other

Please describe your fundraiser:	
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Do you plan on publicizing the Event/Campaign? ____ Yes ____ No

[**Note:** If "yes," please pay particular attention to paragraphs 4-6 below before signing this proposal.]

Publicity Plan:	
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<p>This fundraiser is: <i>*choose one</i></p>	<input type="checkbox"/> A One-Time Event/Campaign Event Date: Event Time: Event Venue:
	<input type="checkbox"/> Annual Event/Campaign Current year information: Event date: Event Time: Event Venue:
	<input type="checkbox"/> An ongoing opportunity Please note: Contracts for ongoing events/campaign will be made on a six-month basis. After the first six months, the program will be evaluated again, and a new contract will be created. Start Date: End Date:

Fill out the section (A, B or C) that pertains to the TYPE of fundraising activity you are proposing

A) One-Time Event (Party/Golf Tournament/etc.)

Is this event open to the public, or is it a private (company/school or personal) event?	Public Private
Who are your intended audience/participants?	
What is your anticipated attendance?	
Have you had experience doing this type of event previously?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Will you be soliciting sponsorships?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Will you be soliciting prizes or auction items?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you expect people outside of Los Angeles county to become involved in the event as participants, sponsors, donors, vendors, or media support?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If answered yes, please explain:	

B) Cause Marketing Campaign (% or \$ of sales)

<p>What is the % of sales that will be going to Make-A-Wish Greater Los Angeles?</p>	
<p>How often will you submit proceeds to Make-A-Wish Greater Los Angeles?</p>	<p> <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> At the end of the contract <input type="checkbox"/> Other (please describe): </p>
<p>Would you like us to promote your campaign on our website and in other outlets? <i>*contingent on anticipated donation.</i></p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

C) Other (please describe)

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/Campaign generate other types of revenue? _____ Yes _____ No

If yes, what % or amount of that revenue will Make-A-Wish receive? _____

Anticipated total revenue: \$ _____

Anticipated total expenses: \$ _____

Anticipated total donation to Make-A-Wish Greater LA: \$ _____

Fundraising and Event HANDBOOK

TERMS AND CONDITIONS

1. Sponsor agrees to provide Make-A-Wish with all of the net proceeds from the Event or Campaign, along with a written accounting of Event/Campaign 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 or Campaign 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., Los Angeles county.
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 or Campaign; provided, however, that Make-A-Wish has the right to terminate the license if it determines, in its reasonable discretion that the Event or Campaign is or will likely be injurious to the Marks.
4. Any use of the Make-A-Wish 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 or Campaign 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 or Campaign 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 or Campaign.
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/Campaign; (c) the Event/Campaign 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/Campaign.
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.

Fundraising and Event HANDBOOK

PLEASE REVIEW AND INITIAL THE FOLLOWING POLICIES:

____ I have reviewed the manual and understand and agree to the above terms and conditions for holding a fundraising event to benefit Make-A-Wish Greater Los Angeles.

____ I understand and agree that Make-A-Wish Greater Los Angeles has a \$1,000 minimum guarantee on all third party events.

____ I understand and agree to use the Make-A-Wish name and/or marks (logo) only as specified on page 9 "Revenue Guidelines for External Event Support" and agree to submit all collateral and artwork for approval before publishing.

____ I agree to submit all the proceeds of the event within 30 days of the close of the event.

____ Review for Risk: I understand that external events are NOT covered by the Make-A-Wish insurance policy. I have reviewed our insurance and have determined that our insurance is adequate for this event. In particular, I have considered the issues below.

- o alcohol and drugs
- o crowds
- o fire safety and emergency medical services
- o food and water safety
- o outdoor event concerns
- o automobile transportation

Note: This Special Event/Campaign 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:

Signature of authorized representative of Sponsor

Date

Print Name

Title

APPROVED BY:

APPROVED BY:

Signature of authorized representative of Make-A-Wish Greater Los Angeles

Signature of authorized representative of Make-A-Wish Greater Los Angeles

Print Name

Print Name

Title

Title

Date

Date