

Make-A-Wish® Central and Western North Carolina  
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Central and Western  
North Carolina

## Third Party Event Fundraising Guide

Thank you for your interest in raising funds for **Make-A-Wish® Central and Western North Carolina**. We appreciate your desire to help grant wishes to children in our community who face life-threatening illnesses.

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

Make-A-Wish of Central and Western North Carolina is held accountable to the highest ethical standards of fundraising and is governed by policies established by our national organization, Make-A-Wish® of America. We also adhere to the principles of various watchdog agencies including the Better Business Bureau ("BBB") Wise Giving Alliance.

In completing the Budget Worksheet and Special Event Proposal and License Agreement (included as part of this packet) and planning your fundraiser, there are some guidelines we ask you to follow. Please review the following information carefully.

This guide is intended to help you structure a successful fundraiser in compliance with the organizations requirements. The Special Event Proposal and License Agreement form must be approved by Make-A-Wish 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 Special Event Proposal and License Agreement, this guide, your proposed fundraiser or anything else.

## Organizer Responsibilities

You, the event organizer, are responsible for planning and obtaining support for your fundraiser from inception to the day the check or donation is issued to Make-A-Wish. **It is your job to develop logistics and acquire the venue, sponsors, publicity, prizes, entertainment and staff that are necessary for a successful event, including its fundraising aspects.**

**Your efforts must draw the majority of participants.** We look forward to answering your questions and providing support where we can. You must demonstrate a willingness and ability to fully coordinate a successful effort in order for your event to be approved.

## Proposed Fundraiser Check List

After consulting with Make-A-Wish, and before filling out the Special Event Proposal and License Agreement form, you should do the following with respect to your proposed fundraiser:

- Determine what the event will be and 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
- Determine how funds will be raised (e.g. selling tickets for the event, conducting a silent auction, obtaining sponsors, selling t-shirts, etc.)
- Determine who your audience is and how you will tell them about your event

## Approval Process

**At the end of this packet, you will find a Special Event Proposal and License Agreement (the “Agreement”). Once completed, please return the forms to Make-A-Wish® for approval a minimum of eight weeks prior to your event date.** Your submission will be reviewed by the organization. We will call you with any questions and help revise any areas that are not in compliance with our standards.

Once your fundraiser is approved, you may then use the Make-A-Wish name and logo in accordance with the terms of the Agreement and the guidelines herein. You can expect a response within one week of receipt of the Agreement by Make-A-Wish. **You are not permitted to use the Make-A-Wish name or logo for ANY reason until you have received a copy of the Agreement signed by a Make-A-Wish representative.**

## Using the Make-A-Wish Logo and Name

A copy of the Make-A-Wish Central and Western North Carolina logo will be attached to your approval email in jpeg format. Some rules for using the logo:

- ☆ **Do not use logos found on the internet.** We will provide you with the most current version, which includes our chapter name.
- ☆ The logo's typestyle was developed especially for Make-A-Wish and must be used as it appears.
- ☆ Please do not use “Make-A-Wish” in the title of your event such as Make-A-Wish Golf Outing, instead you can use “Golf Outing to benefit the Make-A-Wish of Central and Western NC” or “Golfing to Grant Wishes” or “Golf for Wishes,” etc.

- ☆ When referring to Make-A-Wish in printed materials, **please be sure that you include hyphens and capitalize the “A.”**
- ☆ Any products for your fundraiser which incorporate the Make-A-Wish logo (such as t-shirts) must be approved by the organization.
- ☆ The registered trademark symbol (®) should always be used on the first or most prominent reference of each registered trademark (e.g., in a headline, or when the marks first appear in a body of text). The circle-R symbol should appear in superscript at the end of each mark (e.g., Make-A-Wish®).

Any information you distribute, publish or send out using the Make-A-Wish name or logo must be reviewed prior to such distribution. **Before publishing, please send an electronic copy of all materials to your Make-A-Wish contact.**

### [Sharing the Make-A-Wish Message](#)

**Do not use the terms “terminally ill,” “dying” or “last wish” when referring to our children. Our wish kids have “life-threatening medical conditions.”** A lot of children for whom we have fulfilled wishes are still living, and many are now adults. We believe their wish had a positive impact on their well-being. Your fundraiser will provide a critically ill child with hope, strength and joy especially if you use language consistent with our mission. Please communicate this important information to everyone involved in promoting your event, and remember to share all materials with us before distributing them.

### [Disclosing Your Donation](#)

The BBB Wise Giving Alliance requires specific disclosure language for indicating how your fundraiser is benefiting the Foundation. Please include this language in all publicity that mentions the organization. If you need assistance determining the appropriate language, please ask your staff contact.

You must clearly disclose how Make-A-Wish benefits from the sale of products or services (i.e., cause-related marketing) when you state or imply that a charity will benefit from a transaction. Such promotions should disclose, at the point of solicitation:

- ☆ The actual or anticipated portion of the purchase price that will benefit Make-A-Wish (e.g., 5 cents will be contributed to Make-A-Wish of Central and Western NC for every XYZ company product sold).
- ☆ 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 \$20,000).

Donation Type	Sample Language
100% of funds collected will be donated to Make-A-Wish® Central and Western North Carolina.	“100% of ticket sales/registration fees/purchase price benefits Make-A-Wish® Central and Western North Carolina.”
If all the money minus your expenses on the event will be donated to the chapter, <b>state the minimum portion</b> or percentage of the amount charged that will benefit Make-A-Wish®.	“A minimum of \$___ from every ticket sold will benefit Make-A-Wish® Central and Western North Carolina.” “Eighty percent of ticket sales will benefit Make-A-Wish® Central and Western North Carolina.”
If a specific dollar amount in the purchase of a product is going to the organization, state the dollar amount.	“For every _____ we sell on _____, \$100 will go to the Make-A-Wish® Central and Western North Carolina.”

## Unacceptable Fund Raising Methods

Make-A-Wish of America policies prohibit our chapter and any of our external fundraisers from telemarketing, conducting door-to-door solicitations, and conducting internet sales. Any proposals using these methods of fund raising will be declined.

Make-A-Wish also reserves the right to choose not to affiliate with any event where fundraising methods do not complement the organization's mission.

## Raising Money for a Wish

If an event is expected to raise the average cost of a wish, a wish ambassador (a child who has had their wish fulfilled) may be available to attend and they or their family can share how a wish has impacted their life. All events have the option to receive our "featured wish story" that they can share with their supporters to show the impact of a wish.

Because these children are medically fragile, we do not designate specific wishes to a fundraising project or event until after the fundraiser has taken place.

If your event raises the average cost of a wish \$6,000 – you can choose to adopt a child's wish. After we receive the funds from your event, we will share with you the story of a special child and the wonderful wish experience the gift provided to them.

## Getting Donations for Your Event

If you are planning to go to companies or organizations to get donations or sponsors for your event, **please provide us with a list of who you plan to approach**, because we may already have a relationship with them. It is not our desire to limit your plans, but to protect our own relationships with those who give directly to our organization on a regular basis.

**PLEASE DO NOT APPROACH PROFESSIONAL SPORTS TEAMS OR CELEBRITIES.** Wish kids from across the country visit North Carolina to meet their heroes, and we need to preserve our carefully coordinated relationships NASCAR drivers, Carolina Panthers and other local celebrities, to make their wishes possible.

## Resources Available to You

We recognize the hard work that goes into your fundraising efforts and understand that you may require additional resources to make your event a success! As an organization we do our utmost to ensure efficiency and appreciate your investment in helping us raise funds to maximize our ability to grant wishes. Although we are happy to consider proposed events at any donation level, because our resources are limited **we hope each external fundraiser using the Make-A-Wish trademarks will raise at least \$1,000.** Here is a listing of resources available upon request.

- |                   |  |
|-------------------|--|
| <b>All Events</b> | * Permission to use the Make-A-Wish® Central and Western North Carolina name |
|                   | * Donation tracking sheet  |
|                   | * Disposable banners   |
|                   | * Template for a press release   |

- \$2,500 +**
  - \* All of the above plus
  - \* Event may be listed in our online calendar of events
  
- \$6,000 +**
  - \* All of the above plus
  - \* Permission to use the Make-A-Wish® Central and Western North Carolina chapter logo
  - \* Ability to become an Adopt-A-Wish partner and adopt one child's wish
  
- \$10,000 +**
  - \* All of the above plus
  - \* Invite a wish family to attend the event or organize meet and greet after event
  - \* One staff member to attend the event
  
- \$15,000 +**
  - \* All of the above plus
  - \* Assistance contacting media

### [Is A Guaranteed Minimum Contribution Required for My Event?](#)

If you are planning a cause-related marketing fundraiser, where an individual or company will make a profit while giving a portion of the proceeds to Make-A-Wish, we may ask for a guaranteed minimum donation.

We may also ask for a guaranteed minimum if there is a risk that the expenses of your event will be so high that very little will be left for the Foundation. Because our own resources are limited, we may ask for a minimum guarantee before committing staff and/or volunteer resources to assist with or participate in the event.

Establishing levels enables our staff to set priorities for fundraising efforts and to pursue other important parts of our mission, such as medical outreach, public awareness, and granting wishes. Levels also allow us to allocate resources to those parties who are willing to undertake the time and commitment required to organize, manage and execute a successful fundraiser.

### [Closing Out Your Fundraiser](#)

After your event we do have a few housekeeping items that will need to be completed for us to properly close out your event file within the guidelines provided by the Make-A-Wish of America.

- ☆ **Deliver funds to the organization within 30 days.** You can mail donations to our office, deliver donations in person or we can arrange to pick them up from you. We rely on these funds to grant wishes, so please deliver them at your earliest opportunity.
- ☆ Complete the Financial Summary Report which includes all income and expenses with copies of receipts for expenses that exceed \$500.
- ☆ Do not deposit any checks made payable to "Make-A-Wish" or attempt to open a bank account in the name of "Make-A-Wish." Please deliver all checks made payable to Make-A-Wish to our office and we will deposit them.

# BUDGET WORKSHEET



Central and Western  
North Carolina

Please complete this budget and submit with your License Agreement

Expenses	Dollar Amount	Income	Dollar Amount
Supplies		Ticket Sales/Entry Fees	
Security		Pledges (i.e. walk-a-thon)	
Postage & Shipping		Sponsorships	
Equipment Rental		Sale of Goods (i.e. bake sale/t-shirts)	
Entertainment		Auction	
Awards & Gifts		Consignment Items (from MAW)	
Insurance		% of Proceeds (i.e. \$1/ticket sold)	
Cost of Goods Sold		Other	
Travel			
Advertising			
Printing & Signage			
Decorations			
Facility Rental			
Food/Beverage			
Other			
<b>Total Expenses</b>		<b>Total Income</b>	
Total Income minus Total Expenses= Net Proceeds			
Total Anticipated donation to Make-A-Wish® Central and Western North Carolina			

## Terms and Conditions

**Please read the license terms and conditions and agree to them by signing below.**

- 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.
- Make-A-Wish of Central & Western North Carolina is a licensed chapter of the Make-A-Wish<sup>®</sup> of America, the owner of certain federally registered and common law trademarks, service marks and trade names including Make-A-Wish 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. 51 counties in central and western NC.
- 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.
- 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.
- 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.
- 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.

- 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.
  
- 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.
  
- 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 MAKE-A-WISH OF CENTRAL & WESTERN NORTH CAROLINA. IT IS BECAUSE OF CARING PEOPLE LIKE YOU THAT WE ARE ABLE TO BRING HOPE, STRENGTH AND JOY TO SO MANY SPECIAL CHILDREN IN THIS AREA. THANKS FOR HELPING US MAKE WISHES COME TRUE!**

**Please Note:**

This 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:**

\_\_\_\_\_  
Signature of authorized representative of Sponsor

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Approved By:**

\_\_\_\_\_  
Signature of authorized representative of Make-A-Wish® of Central and Western North Carolina

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
President & CEO  
Title

\_\_\_\_\_  
Date