



Morgan's Inclusion Initiative

Morgan's Inclusion Initiative Third-Party Fundraising Guidelines

Morgan's Inclusion Initiative and our associated entities are incredibly grateful to the many community groups, organizations, and individuals who wish to organize fundraisers and fundraising events to support our mission of inclusion. Our associated entities include Morgan's Wonderland, Morgan's Inspiration Island, Morgan's Wonderland Sports, STRAPS, Morgan's Wonderland Camp, and The Multi-Assistance Center (or The MAC).

By taking on a third-party fundraiser, you assume the responsibility of creating a successful event without a significant level of assistance from Morgan's Inclusion Initiative or any of our entities. We have several major events and fundraising appeals each year that, to complete successfully, require the total dedication of all staff and resources. The nature of third-party events limits us because we cannot schedule them, budget for them, or predict how much revenue they can generate from them. Therefore, we generally must reserve the resources we have for our events and fundraising efforts, which we can schedule, budget, and reasonably predict the amount of revenue these events will yield.

All special events and fundraising efforts conducted to benefit the Morgan's Inclusion Initiative or our associated entities must be run by financially responsible and reputable organizations or individuals motivated by a genuine desire to help promote and further our mission. If you are interested in conducting and organizing a third-party fundraiser to benefit Morgan's Inclusion Initiative or associated entities, each of the following guidelines must be followed:

- All organizations must submit all external fundraisers for review and approval through the Morgan's Wonderland Mission Office. Only third-party events that meet specific criteria and benefit our organizations' missions will be considered for approval.

The Third-Party Fundraising Committee will discuss your proposal and notify you of your submission status within ten business days.

Definitions

Third-Party Fundraising Event – A fundraising activity by a non-affiliated group or individual, where Morgan's Inclusion Initiative has no fiduciary responsibilities and little or no staff involvement.

Event Organizer – Person, group, organization, or business hosting a third-party fundraising event to benefit Morgan's Inclusion Initiative or our other entities.



Event Application and Approval

- All organizations must obtain approval from Morgan's Inclusion Initiative before you advertise or hold your event.
- Annual events/initiatives must be submitted for approval each year.
- The Morgan's Inclusion Initiative reserves the right to refuse funds raised at unapproved events and activities.
- All organizations must send funds raised to the Morgan's Inclusion Initiative within 30 days of the event or fundraiser's conclusion.

Marketing and Promotion

- Any requests for the use of the Morgan's Inclusion Initiative logo (or any associated logos including Morgan's Wonderland, Morgan's Inspiration Island, Morgan's Wonderland Sports, STRAPS, Morgan's Wonderland Camp, and The Multi-Assistance Center at Morgan's Wonderland or The MAC), name, likeness, and images must undergo approval. **Morgan's Wonderland has experienced a recent rebrand as of 2019, which includes a revised trademarked logo. To maintain consistent branding, please refrain from using logos and photos that are found on the internet. Once your event is approved, the Morgan's Inclusion Initiative's Mission Office will provide you with our most updated logos, approved photos for use, talking points, and further information.**
- Third-party events may not be represented as events sponsored by or partnering with Morgan's Inclusion Initiative or associated entity.
- Promotions for the event should reflect that Morgan's Inclusion Initiative (or associated entity) is a beneficiary and not conducting the event (i.e., "proceeds from XYZ Golf Tournament will benefit Morgan's Wonderland").
- Organizations must coordinate any contact with the press or other media with Morgan's Inclusion Initiative.
- All promotional materials related to an event benefiting Morgan's Inclusion Initiative or associated entity must be reviewed and approved by the Chief Mission Officer before implementation or distribution (e.g., flyers, press releases, tickets, brochures, posters, etc.).
- All references to Morgan's Inclusion Initiative or our associated entities in publicity and promotional materials for the event or promotion should refer to "Morgan's Inclusion Initiative" or the specific entity.



- Fundraisers shall state the terms of the donation Morgan's Inclusion Initiative can expect from the event/campaign (e.g., 50% of profits, one-time donation of \$1,000, or all proceeds). This information must be made specific in event/campaign promotions.

Event Expenses

- Expenses incurred for conducting the event are the hosting organization's responsibility, volunteers, and the event organizer.
- If you must buy goods or services for the event and incur expenses, please consider the following:
 - Morgan's Inclusion Initiative or associated entities will not be liable for any costs or expenses.
 - Morgan's Inclusion Initiative will not reimburse the organizer to purchase goods for a third-party event. You may not charge and goods or services to the Morgan's Inclusion Initiative or associated entity for any reason.

Event Income

- The event organizers are responsible for handling accounting for the event.
- All donation checks must be made payable directly to the Morgan's Inclusion Initiative. Gifts intended to be restricted to a specific entity must be made out to that entity or specified in advance.
- Only checks payable to the Morgan's Inclusion Initiative (or associated entity) and cash donations clearly labeled with the donor's information will be provided with a tax-deductible acknowledgment letter per IRS and state tax regulations.
- Donations made out to an organizer or other source may be sent a general acknowledgment letter with no value attached.
- A donation solicited on our behalf, whether a contribution is an item or cash, is fully tax-deductible only when it is made directly and entirely to the Morgan's Inclusion Initiative (or associated entity). We will determine what types of gifts can be considered tax-deductible before solicitation or promotion, as we are the only agents that can verify that such a gift was made, and its nature, to the Internal Revenue Service. This information must be made explicitly clear in the promotion of the event/campaign. When a portion of the charge (or "suggested donation") to the participant in a third-party event/campaign is not tax-deductible, a statement to that effect must be included in all appropriate materials.



- The event organizer agrees to inform Morgan's Inclusion Initiative of any effort to recruit major financial underwriters to ensure there is no duplication of underwriting efforts already underway.
- Within 30 days following the event, organizers should submit funds payable to Morgan's Inclusion Initiative along with appropriate documentation from individuals and/or businesses regarding their financial donations.

How can the Morgan's Inclusion Initiative help with your event?

Morgan's Inclusion Initiative is extremely appreciative of the organizers who manage third-party events to benefit our programs; however, we are limited in the amount of assistance we can provide a third-party event.

Morgan's Inclusion Initiative can provide the following:

- Advice and suggestions on event planning, if appropriate and feasible.
- Approval of the use of the Morgan's Inclusion Initiative's (or associated entity) name, logo, and images*.
- Promotional materials for display.
- Acknowledgement and provision of tax receipts for contributions made payable and submitted to Morgan's Inclusion Initiative.

*Prior approval of event marketing materials where the Morgan's Inclusion Initiative's (or associated entity) name, logo, or images is utilized is not optional.

Morgan's Inclusion Initiative is unable to provide the following:

- Assistance in soliciting donations, handling mailings, attending committee meetings, recruiting attendees, and collecting monies.
- Use of the Morgan's Inclusion Initiative's (or associated entity) tax-exemption number for making any purchases related to your event.
- Guaranteed volunteer, Board Member, or staff attendance at your event.
- Access to donor lists or contacts.
- Responsibility of any nature or kind associated directly or indirectly with the event, including, but not limited to, expenses, purchases, insurance, or liability coverage.



Third-Party Event Form

Thank you for your interest in holding an event or initiative to benefit the Morgan's Inclusion Initiative (or associated entity)! We truly appreciate your efforts; the money you raise is an integral part of our fundraising to promote inclusion in our community.

Please review all Third-Party Fundraising Guidelines before completing this document. Then, submit the completed form (pages 6-8) to Brooke Kearney, Chief Development Officer, at Inclusion@MorgansWonderland.com. We will respond to you within ten business days.

CONTACT INFORMATION

Group/Organization Name: _____

Group/Organization Address: _____

City _____ State _____ Zip _____

Event Coordinator's Name: _____

Phone: _____ Email: _____

EVENT/INITIATIVE OVERVIEW

Event name (if applicable): _____

Location of event: _____

Date(s) of event: _____ Hours of event: _____

Event description/type/objective: _____

Has this event been held before? Yes No

If yes, when, how often (i.e.: annually, quarterly) and with what result?

Projected audience (who will attend or support the event): _____

Projected attendance (how many): _____

List all sponsor(s), if any: _____



FINANCIALS

Please indicate which entity you wish to restrict your donation to:

Do not restrict- Give to Morgan's Inclusion Initiative benefitting all entities

Morgan's Wonderland/Morgan's Inspiration Island Morgan's Wonderland Camp

Morgan's Wonderland Sports STRAPS The MAC

What percent of proceeds from the event will go to the above selection? _____%

*Approved third-party events must donate a minimum of 20% of proceeds

Projected total donation: Minimum \$ _____ Maximum \$ _____

What other organizations will receive part of the income, if any?

PUBLICITY

PLEASE NOTE: Morgan's Inclusion Initiative must review and approve all collateral pieces that use our logo or name before production to ensure that the collateral meets our standards. This approval process happens quickly and can be conducted via email.

Please indicate the types of promotional activities you may pursue:

Press Release _____ Promotional Flyers _____ PSA _____ Social Media _____

Posters _____ Invitations _____ Website _____ Mass Email _____

Other (describe) _____

I would like to use the Morgan's Wonderland logo

Full Color _____ Black and White _____

Print Quality (.eps) _____ Word/PPT/Web Quality (.jpg) _____



AGREEMENT

A third-party fundraising event is an outside organization or individual creates and organizes to raise funds that benefit Morgan’s Inclusion Initiative or specified associated entity. The external organization or individual is responsible for all aspects of the event and fundraising.

Signature:

I agree to adhere to the Morgan’s Inclusion Initiative Third-Party Fundraising Guidelines.

Event Coordinator or POC (print)

Date

Event Coordinator or POC (signature)

Email

Organization Name

Phone

Organization Address

Please return this form to Morgan’s Inclusion Initiative:

Scan and email to:

Brooke Kearney, Chief Development Officer

Inclusion@MorgansWonderland.com

By mail: Morgan's Wonderland

Attn: Brooke Kearney

5223 David Edwards Drive

San Antonio, TX 78233

are making

TOGETHER, WE CAN MAKE A DIFFERENCE!

