



Morgan's

Third-Party Fundraising Guidelines

Morgan's 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 Sports, Morgan's Camp, and Morgan's Multi-Assistance Center, or Morgan's 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 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 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 or associated entities, each of the following guidelines must be followed:

- Organizations must submit all external fundraisers for review and approval through the Morgan's Shared Services 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 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 or our other entities.



Event Application and Approval

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

Marketing and Promotion

- Any requests for the use of the Morgan's logo, (or any associated logos including Morgan's Wonderland, Morgan's Inspiration Island, Morgan's Sports, Morgan's Camp, and Morgan's Multi-Assistance Center) name, likeness, and images must undergo approval. **Morgan's Wonderland has experienced a recent rebrand as of 2023, 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 Shared Services 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 or associated entity.
- Promotions for the event should reflect that Morgan's (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.
- All promotional materials related to an event benefiting Morgan's or associated entity must be reviewed and approved by the Chief Marketing Officer before implementation or distribution (e.g., flyers, press releases, tickets, brochures, posters, etc.).
- All references to Morgan's or our associated entities in publicity and promotional materials for the event or promotion should refer to "Morgan's" or the specific entity.
- Fundraisers shall state the terms of the donation Morgan's 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 or associated entities will not be liable for any costs or expenses.
 - Morgan's will not reimburse the organizer to purchase goods for a third-party event. You may not charge goods or services to Morgan's 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. 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 (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 (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 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 along with appropriate documentation from individuals and/or businesses regarding their financial donations.

How can the Morgan's help with your event?

Morgan's 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 can provide the following:

- Advice and suggestions on event planning, if appropriate and feasible.
- Approval of the use of the Morgan'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 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 (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 (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 to the Development Department, at Inclusion@Morgans.org. 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 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 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 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 or specified associated entity. The external organization or individual is responsible for all aspects of the event and fundraising.

I agree to adhere to the Morgan's 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:

Scan and email to:

Inclusion@Morgans.org

By mail: Morgan's

Attn: Development

PO Box 34986

San Antonio, TX 78265

are making

TOGETHER, WE CAN MAKE A DIFFERENCE!