

Operation Smile, Inc. Chapter Guidelines

Revised 10/2009

- In order to become recognized as an official Operation Smile Chapter a total of \$100,000.00 needs to be netted on an annual basis. That \$100,000.00 can be generated through one event or a combination of events in one given fiscal year.
- Volunteers interested in hosting an Operation Smile Chapter fundraising event need to maintain communications with the Chapter National Director prior to, during and following the event. The National Chapter Director is the first point of contact for all Chapter members.

Operation Smile National Chapter Director Contact:

Lauri E. Catena

lcatena@operationsmile.org

Direct Dial: 610.759.6070

Fax: 610.759.6079

- Event invitations and announcements must be reviewed and approved by the Operation Smile Marketing and Communications Department before being released to the public. The National Chapter Director will approve and forward all invitations and announcements to the Operation Smile Marketing and Communications Department.
- Chapter events should be posted on the Events calendar on the Operation Smile website in order to advertise the event. Chapter event details needs to be submitted at the link: www.operationsmile.org/eventrequest.

Contact for event link:

Matt Burghdoff eCRM Coordinator

Operation Smile International Headquarters

6435 Tidewater Drive Norfolk

VA 23509 USA

Direct Line: 757-321-3267

- All public and media relations press releases need to be approved prior to release by the Operation Smile, Inc. Headquarters Marketing/Communications Department.
- Solicitation by the Chapter from prospective donors, foundations, corporations, private funding sources and celebrity contacts need prior approval by the National Chapter Director to determine if the funding source has a previous history with Operation Smile.
- All checks received must be photocopied for the Chapter's records, documented on a spreadsheet with a detailed description of what the check has been designated for and promptly forwarded to the lockbox location within two weeks following a Chapter event. Donor Log spreadsheets need to be used, forwarded, and emailed to both the lockbox location and the HQ Finance Department.

The Lockbox Location is: Operation Smile, Inc.

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| P. O. Box 60897 Charlotte, NC 28260-0897 |
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The Lockbox Address for FedEx, UPS and Express Mail packages is:

Wachovia Bank NA
Operation Smile Inc.
P. O. Box 60897
1525 West W. T. Harris Blvd -#2C2
Charlotte, NC 28262
704-590-5378

FedEx Account # 2370-0631-3

UPS Account # X744W7

The FedEx and UPS shipping numbers that may be used to send overnight items must have prior approval and sent to Operation Smile:

Address to mail via overnight/express delivery only:

Wachovia Bank NA
Operation Smile Inc.
P. O. Box 60897
1525 West W. T. Harris Blvd -#2C2
Charlotte, NC 28262
704-590-5378

FedEx Account # 2370-0631-3

UPS Account # X744W7

The Contact Person is: Sondria Yates Manabat
Senior Accountant, Operation Smile
757-321-3238
smanabat@operationsmile.org

- All outside vendor/consultant contracts must be approved by the National Chapter Director and the Operation Smile Chief Operating Officer prior to purchase of the service or product.
- Total Event direct costs may not exceed 25% of Chapter Event revenue.
- It is the responsibility of the Chapter members to work cohesively with the Operation Smile Finance Department and provide all required financial information, vendor contracts and receipts in order that Operation Smile may keep its 501c3 status protected.
- All Chapters need do their very best to negotiate the best market value price (preferably donated) for a product or service received in relation to the fundraising event.
- Ideally Operation Smile, Inc. Chapter fundraisers should not be combined with or jointly hosted or held in conjunction with by any other non-profit organization.

- The Operation Smile logo must be used in its entirety and may not be combined with other organization's logos.
- Announcements for events need to be sent to HQ in a timely manner in order to be included in the Operation Smile newsletter or posted on the Operation Smile website. Chapter Event Logs need to be completed and submitted for approval.
- Chapter Pre-Event Information Form needs to be completed and submitted to the National Chapter Director for approval prior to the event being scheduled.
- Chapters need to prearrange for a photographer to attend their fundraising events in order to provide photos for local media in addition to the Operation Smile e-mail newsletter and website.
- All auction items acquired for events need to be adequately described and the fair market value (FMV) of each item needs to be determined and documented. Operation Smile Auction Procurement Forms need to be completed for all auction items.
- Operation Smile mission trips cannot be offered as event auction items unless approval from HQ has been granted.
- Chapter Committees should be established and not Chapter Governing Boards.
- Operation Smile Inc. is the sole owner of the HQ donor mailing list but in the event a Chapter chooses to mail out announcements/invitations to prospective attendees in their area or surrounding area, Operation Smile HQ will supply mailing labels on a per needed basis.
- Every donor is an Operation Smile Inc. donor. Operation Smile headquarters and the regional staff will work with the Chapters to steward and grow those donors.