

# Fundraising Guidelines

## General guidelines:

1. All fundraising events and activities must fit the mission and support the image of Operation Smile.
2. Operation Smile does not endorse any events that include telemarketing, door knocking, violent or dangerous activities, or the sale or promotion of tobacco products or illegal drugs.
3. If another organization, in addition to Operation Smile, will benefit from the fundraising event, we require notification in advance.
4. A gift made through fundraising represents a gift to the entire Operation Smile mission. To help the most children, we use your gift where it can do the most good by pooling it with the gifts of others.
5. To protect our donors' confidentiality, Operation Smile does not share its donor list.
6. Operation Smile cannot guarantee a speaker, representative, or celebrity for your event because of the number of requests we receive.
7. Operation Smile cannot sponsor, solicit sponsorship or reimburse expenses for your fundraising event. Please let us know if you recruit underwriters/sponsors for your event to avoid any conflicts with our own solicitation efforts.
8. Operation Smile will not provide a tax receipt for the donation of goods or services to your event.
9. Operation Smile reserves the right to approve the use of our name and logo on all promotional materials, including items such as flyers, posters, websites, etc.
10. Fundraisers must have promotional materials reviewed and approved by Operation Smile before they can be used. All of your promotional materials must indicate:
  - a. Operation Smile is not the event sponsor.
  - b. Funds are being raised by you/your organization to benefit Operation Smile.

## Event Organizer's responsibilities:

1. A **Fundraising Application form** must be submitted a minimum of 45 days prior to your event or activity.
2. The Fundraising Approval Form must be signed and returned to Operation Smile for approval at least 14 days prior to your fundraising event.
3. A new application must be submitted for each new event or activity.
4. The fundraising event or organizer/sponsor/organization agrees to indemnify, refund and hold Operation Smile harmless against and in respect of any and all claims, demands, losses, costs, expenses, obligations, liabilities damages, recoveries and deficiencies, including interest, penalties and reasonable attorney's fees that shall be incurred or suffered by Operation Smile which arise, result from or relate to the fundraising event or appeal, the organizer/sponsor/organization's performance of its agreement as specified in these guidelines.
5. All expenses associated with the event are the responsibility of the fundraiser of the event. Expenses should not exceed 25 percent of the gross revenue.
6. The event organizer will notify Operation Smile of the portion of donation, event ticket price or amount of proceeds (either the percentage or actual amount) that will be directed to Operation Smile
7. The event organizer is responsible for obtaining all necessary permits, licenses or insurance.
8. Operation Smile must be notified if there are any significant changes to the event/campaign once it has been approved. If circumstances warrant, Operation Smile may at any time direct you to cancel the event or fundraising activity. You must abide by the decision of the organization and agree to cancel if directed.

## THIRD-PARTY FUNDRAISING

9. Review the **Fundraising Donation FAQ**. We have very specific information on how participants in your fundraising activity can receive a tax receipt for their donation to Operation Smile.
10. Within 14 days of your completed fundraising event or activity, please send a final accounting of income and expenses along with your proceeds to Operation Smile. Please include the contact information for individuals and organizations that need receipts for tax purposes. Details can be found in the Fundraising Donation FAQ.

### **Operation Smile agrees to provide:**

1. A letter to verify your approval to fundraise on behalf of Operation Smile
2. A Fundraiser Toolkit that includes approved materials with our logo
3. Tax receipts for donors who make contributions and provide specific receipting information as directed by law
4. Inclusion of the event on the Calendar of Upcoming Events on the Operation Smile website
5. Access to personal fundraising page (i.e. *OneSmile* page)

*\*Last updated July 17, 2013.*

Please copy all forms for your records. For questions regarding this form or the submission of fundraising revenue, call 1-757-321-7645. Contributions are tax deductible as permitted by law. Operation Smile, Inc. is a charitable organization pursuant to Section 501(c)(3) of the Internal Revenue code. Federal Tax ID number: 54-146-0147.