



Third- Party Fundraiser –Guidelines and Application

Thank you for your interest in supporting Charleston Animal Society by selecting us as a beneficiary of your fundraiser. Donations to Charleston Animal Society are extremely important and your interest in partnering with us is greatly appreciated.

Charleston Animal Society is accountable to the public and Internal Revenue Service for fundraising activities using the name of Charleston Animal Society. To this end, the following guidelines have been developed to serve as standards for those who organize special events, benefits or promotions on behalf of Charleston Animal Society. ("Sponsor" is the fundraiser organizer.)

Charleston Animal Society is extremely grateful to the many outside persons who wish to organize fundraisers to support our programs. However, only those third-party fundraisers which meet specific criteria and benefit Charleston Animal Society will be considered for approval. Each fundraiser will be reviewed on a case-by-case basis.

- ✓ Charleston Animal Society defines a "Third-Party Fundraiser" as any fundraising activity by a non-affiliated group or individual where Charleston Animal Society has no fiduciary responsibilities and minimal or no staff involvement.

Event Application and Approval

- ✓ Please review these Third-Party Fundraising Guidelines. After reviewing these guidelines, please complete and submit for approval the application and return it to: Erin Nosker, Manager of Business Partnerships, enosker@charlestonanimalsociety.org
- ✓ Approval by Charleston Animal Society must be obtained before you advertise or hold your fundraiser.
- ✓ Annual fundraisers should be registered with Charleston Animal Society each year.
- ✓ Charleston Animal Society reserves the right to refuse funds raised at unapproved events and activities.

Marketing and Promotion

- ✓ Third-party fundraisers may not be represented as fundraisers sponsored by Charleston Animal Society.
- ✓ Promotions for the fundraiser should reflect Charleston Animal Society as a beneficiary (i.e. "proceeds from XYZ Fundraising Event will benefit Charleston Animal Society").
- ✓ All promotional materials related to a fundraiser benefiting Charleston Animal Society must be reviewed and approved by the Manager of Business Partnerships prior to distribution (e.g. flyers, press releases, tickets, brochures, posters, etc.).
- ✓ The use of Charleston Animal Society name, logo, trademark or collateral materials is reserved for events conducted by Charleston Animal Society itself. Therefore, any requests for the use of Charleston Animal Society logo or trademark must be used in accordance with written brand guidelines and must undergo approval. No use of Charleston Animal Society's name, collateral materials and/or logo will be allowed without specific request and agreement.
- ✓ All references to Charleston Animal Society in publicity and promotional materials for the fundraiser or promotion should refer to "Charleston Animal Society."

Fundraising Insurance and Liability

- ✓ Sponsor is responsible for obtaining any necessary permits and clearances required by local and state government and complying with all applicable laws. Sponsor must also obtain appropriate insurance coverage as necessary.
- ✓ All third-party events should ideally be accessible to people with disabilities. Ideally the event should take place at a venue that meets ADA regulations. Sponsor is expected to promote and make arrangements for any special accommodations and needs by participants.
- ✓ Charleston Animal Society cannot be held liable for details associated directly or indirectly with the event, including, but not limited to, expenses, purchases, insurance or liability coverage.

Fundraising Expenses

If you must buy goods or services for the fundraiser and expenses will be incurred, please consider the following:

- ✓ Expenses incurred for conducting the fundraiser are the responsibility of the hosting volunteers and the Sponsor of the fundraiser. Charleston Animal Society will not be liable for any costs or expenses.

- ✓ Charleston Animal Society will not reimburse the Sponsor for the purchase of goods for a third-party fundraiser. No goods may be charged to Charleston Animal Society for any reason.

Fundraising Income

- ✓ The fundraising Sponsor is responsible for opening and maintaining his/her own bank account for the fundraiser. Bank accounts may not be opened in the name of Charleston Animal Society.
- ✓ Any check payable to Charleston Animal Society must be sent directly to Charleston Animal Society at 2455 Remount Rd. North Charleston, SC 29406.
- ✓ Only checks payable to Charleston Animal Society will be provided with a tax-deductible acknowledgement letter in accordance with 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.
- ✓ If you are deducting expenses before sending net proceeds to Charleston Animal Society, you should not state or imply to your donors that any funds given to you are tax deductible, and you should not use the word "donation" because it implies that they are tax deductible.
- ✓ Sponsor agrees to inform Charleston Animal Society of any effort to recruit major financial underwriters to ensure there is no duplication of underwriting efforts already underway by Charleston Animal Society.
- ✓ Kindly submit appropriate documentation from individuals and/or businesses regarding their financial donations.
- ✓ Kindly submit raised funds, payable to Charleston Animal Society, within 60 days of fundraiser.

Tax Guidelines and Implications

- ✓ As a responsible steward of public funds, Charleston Animal Society holds to the standard set forth in the Better Business Bureau guidelines. Fundraisers held to benefit Charleston Animal Society are expected to keep expenses to a minimum.
- ✓ If Sponsor represents to the public that proceeds will benefit other organizations in addition to Charleston Animal Society, Sponsor should be prepared to provide access to an accounting of revenues and expenses. If so requested, an accounting and fund distribution will be expected within 60 days after the conclusion of the special event or promotion.
- ✓ Sponsor is responsible for complying with all IRS regulations registrations applicable to the event.

- ✓ Federal tax laws disallow fundraisers from using Charleston Animal Society Tax Exemption number or Federal Employer Identification number when purchasing any goods or services from suppliers or vendors.

How can we help you with your fundraiser?

Charleston Animal Society is extremely appreciative of the volunteers who manage fundraisers to benefit its programs. Charleston Animal Society is limited in the amount of assistance it can provide a third-party fundraiser. Volunteer third-party management of the fundraiser or project minimizes the cost per dollar raised for our programs and allows Charleston Animal Society staff to continue the work they are already doing to support our mission.

Charleston Animal Society can provide the following:

- ✓ Advice and suggestions on fundraising, as time allows.
- ✓ Approval of the use of Charleston Animal Society name, logo and collateral materials.
- ✓ A letter of authorization to be used to validate the authenticity and intention of the fundraiser and its organizers.
- ✓ Promotion of your fundraiser, when appropriate, to Charleston Animal Society community supporters and followers through social media platforms such as Facebook and Instagram.
- ✓ Post fundraiser recognition, when appropriate, to Charleston Animal Society community supporters and followers through social media platforms such as Facebook and Instagram during the week following the date of the fundraiser or when the contribution is submitted to Charleston Animal Society.
- ✓ Acknowledgment and distribution of tax receipts for contributions made payable and submitted to Charleston Animal Society.

Charleston Animal Society is unable to provide the following:

- ✓ Assistance in soliciting donations, handling mailings, attending committee meetings, recruiting attendees or collecting monies.
- ✓ Charleston Animal Society sales tax-exemption number for making any purchases related to your event.
- ✓ Guaranteed volunteer, Board Member, or staff attendance at the event, access to donor lists or contacts.
- ✓ Responsibility of any nature or kind associated directly or indirectly with the fundraiser, including, but not limited to, expenses, purchases, insurance or liability coverage



Please complete the following application and submit for consideration of approval for third-party fundraisers. **The application must be submitted a minimum of three weeks prior to the date of the event.**

Third-Party Application
(Please print or type)

1. Name of Company/Organization: _____

2. Contact Name: _____

Title: _____ Phone: _____ Fax: _____

E-Mail: _____ Website: _____

Address: _____

City: _____ State: _____ Zip: _____

3. Date(s) of event/promotion: _____

4. Location of event & address: _____

5. Description of event/activity (i.e., basic concept/promotion/goal):

6. In what way would you like to submit your contribution to Charleston Animal Society?

7. Projected Minimum/Maximum Dollars \$_____ / \$_____ or _____% of income to Charleston Animal Society.

8. Will other organizations receive a portion of the income? Yes _____ No _____
(If yes, please indicate who they are and the dollar amount \$_____ or _____% of income they will receive.)

9. Proposed use of Charleston Animal Society name, logo and collateral materials.
Which, if any, names, logo and or collateral materials are you requesting permission to use or display in connection with your event? (Please check)

_____ Charleston Animal Society (logo)
_____ Charleston Animal Society Fact Sheets
(Pre-approval is required before distribution)

10. Would you like adoptable animals onsite? Yes ____ No ____
(If yes, please know there is a \$500 fee to cover set-up and staff costs.)

11. Is there any other additional information about the event you would like to share?

Agreement:

I have read the enclosed Charleston Animal Society Third-Party Fundraising Guidelines and both understand and agree to all of the terms of agreement.

Signature of Responsible Party

Date

Thank you for your interest in partnering with Charleston Animal Society and helping us save more lives.

Contact: Erin Nosker, Manager of Business Partnerships
Charleston Animal Society
2455 Remount Rd
North Charleston, SC 29406
enosker@charlestonanimalsociety.org

Once the application is submitted, you will be contacted to discuss the details of the agreement as well as each organization's responsibilities.