

Welcome to Third Party Fundraising The Medical University of South Carolina

THANK YOU! The Medical University of South Carolina (“**MUSC**”) is extremely appreciative of inquiries of donors and supporters, like yourself, to conduct independent fundraising efforts for the benefit of MUSC. MUSC greatly appreciates and is thankful of your philanthropic efforts to support MUSC’s three-part mission of cutting-edge research, compassionate patient care, and world-class education.

To assist you, we want to make you aware of the tax, legal, and compliance requirements that apply to MUSC when third party fundraisers, such as yourself, generously decide to lead such an independent, fundraising effort.

While all such donations will benefit MUSC, The Medical University of South Carolina Foundation, a South Carolina nonprofit corporation (the “**Foundation**”) will be the actual recipient organization to funds that you raise on behalf of and for the benefit of MUSC.

To ensure compliance, both MUSC and the Foundation must coordinate with you and MUSC must approve all events and campaigns in advance. MUSC and the Foundation ask that any individual, group or organization who intends to promote an event to benefit MUSC must:

- Review and adhere to the MUSC Third-Party Fundraising Guidelines
- Submit the following forms:
 - [Third-Party Fundraiser Application](#) (Submit at least 60 days prior to the fundraiser)
 - Third-Party Financial Summary Form (Submit within 30 days upon completion of fundraiser)

The application may be printed, signed and returned via direct mail or email to giving@musc.edu. By returning or submitting the application form, you are agreeing to the terms and conditions of the MUSC Third-Party Fundraising Guidelines.

Please complete the application form a minimum of 60 days in advance of the event. Once we receive the application, we will contact you within two (2) business days to get started.

We look forward to an opportunity to connect with you!

Questions? Please contact us at giving@musc.edu

The Medical University of South Carolina

Third-Party Fundraising Guidelines

The Medical University of South Carolina is grateful to those interested in supporting our endeavors in patient care, education, research, and community outreach. We recognize the great amount of hard work you will undertake on our behalf and we want your Event to be a success. Please review carefully the following guidelines that have been developed by MUSC and its independent, supporting foundation, The Medical University of South Carolina Foundation, who will be the recipient of all funds raised for the benefit of MUSC. These guidelines have been designed for the protection of you, as the Fundraiser, MUSC, and The Medical University of South Carolina Foundation, and to assist you as you begin your fundraising activities.

DEFINITIONS

“Fundraiser”, “You” or “Your” means any third-party person or entity engaged in a fundraising effort to benefit MUSC, including but not limited to, peer-to-peer fundraisers, corporate fundraisers, fundraising on social networks, awareness events and stewardship and other interest cultivating events;

“MUSC” or “We” refers collectively to The Medical University of South Carolina, its divisions, departments, and its governmental affiliate Medical University Hospital Authority, and includes, without limitation, MUSC Hollings Cancer Center and MUSC Shawn Jenkins Children’s Hospital;

“Foundation” is The Medical University of South Carolina Foundation, a nonprofit organization that is separate and independent from MUSC, but exclusively dedicated to support MUSC. The Foundation is recognized as a tax-exempt organization pursuant to IRC §501(c)(3) and is the entity that receives and manages charitable contributions on behalf of MUSC; and

“Event” means any activity, for which you intend to engage in fundraising efforts on behalf of MUSC, where (i) it is anticipated that there will be multiple individuals participating, attending, or engaged in your event or (ii) your activity might generate, for MUSC’s sole benefit, revenues in excess of \$250. Additionally, for your activity to be recognized as an Event, you must apply to MUSC as provided in these guidelines and an MUSC Special Event Liaison must recognize in writing that your proposed activities constitute an Event. If the MUSC Special Event Liaison denies your application, you may not proceed with any reference to MUSC and your efforts will not be considered an Event as contemplated in these guidelines. Furthermore, should you fail to comply with these guidelines, MUSC reserves the right to revoke recognition of Event status.

“MUSC Special Event Liaison” means the individual or individuals at MUSC who will review your application to approve or deny, and if approved, will provide you assistance as contemplated in these guidelines.

GUIDELINES FOR THE FUNDRAISER

Before you begin to fundraise, we ask that you read these guidelines and complete the application to conduct an Event at least sixty (60) days before your contemplated date of commencement. You may complete the [application online](#) or print and mail/email the application included at the end of these guidelines.

Also provided with these guidelines is the “*MUSC Fundraising Toolkit*.” The MUSC Fundraising Toolkit is a resource to assist you in connection with your Event and to ensure that your activities are conducted within these guidelines.

You will find below a series of steps to follow that will walk you through the approval process for your Event and explain to you what resources MUSC and the Foundation, respectively, have available to help you.

Step One: MUSC Approval

Please review these guidelines prior to the submission of the [application form](#). You must submit the application sixty (60) days in advance of the prospective date of your Event. An MUSC Special Event Liaison will review your application and will respond within two (2) business days, acknowledging your submission. The MUSC Special Event Liaison may provide approval for your Event at that time or work with you to address any unique considerations associated with your Event in order to ensure compliance with the laws applicable to MUSC and the Foundation in connection with third-party fundraising events, as well as MUSC and Foundation processes and procedures. In order for you to proceed with the Event, the MUSC Special Event Liaison must approve your Event at least thirty (30) days in advance of the Event.

If you would like an MUSC speaker or staff present, your request must be included within your Event application. Due to the large number of requests, we cannot guarantee that an MUSC speaker or staff person (including medical faculty/staff, students and patients) will be able to attend/participate.

MUSC will consider each Event application individually. The Event must be consistent with the mission and values of MUSC and the Foundation. As we evaluate your application, we want to advise you that the following activities are not permitted at any Event:

- Any activity that does not support or is contrary to the mission and values of MUSC.
- Any promotion of a political party, candidate.
- Any endorsement of a political issue.
- Any promotion or endorsement of religious issue(s).
- Any endorsement of third-party business products or services.
- Any conflict with a marketing or public relations campaign of MUSC.

- Any activity that requires MUSC to sell tickets, coupons, etc. or involves telemarketing or door-to-door solicitation.
- Any raffle or similar activity (however, such restriction is not applicable for any organization recognized as tax exempt pursuant to IRC section 501(c)(3) as long as it follows all applicable laws, rules, and regulations, including appropriate licensing and registration).

Step Two: Solicitation for Your Event

Upon request and to the extent possible, included within your application, you are to provide the MUSC Special Event Liaison a list of targeted sponsors and donors for the Event before any such person is approached. We request that you adhere to these guidelines to minimize overlap with other MUSC events and/or fundraising campaigns that may be underway. This practice assists MUSC and the Foundation to prevent “over-messaging” to donors and inadvertent conflicts among fundraising efforts.

Upon the approval of an Event and following the vetting of your target sponsor and donor list, the MUSC Special Event Liaison will provide a letter of support (“**Letter of Support**”) to you from MUSC, which will serve to recognize the Event and your Event solicitation activities. However, to be clear, you are not permitted to hold yourself out or give the appearance that you are an employee or working for MUSC, including using or creating MUSC letterhead or official correspondence in connection with your Event. You must at all times represent that you are an independent individual or group that is fundraising on your own at an Event that you have created, but with the recognition and thanks of MUSC.

Step Three: Promotion of Event

Use of MUSC Branding to Promote your Event

You are solely responsible for marketing and promoting your Event, including media, press releases, websites, posters, flyers, direct mail, email, social media and advertising. MUSC must approve, in advance and in writing, all Fundraiser materials prior to such materials being used in any media, print or electronic to promote or in connection with your Event.

No MUSC trademarks, branding or logos may be used in connection with your Event, unless otherwise approved in writing and in advance by the MUSC Special Event Liaison in accordance with MUSC Brand policies and guidelines.

Promotional materials should state in text format that the Event is "to benefit" or "benefiting" MUSC and/or its initiatives. Example: *"Benefiting MUSC Shawn Jenkins Children's Hospital," "To benefit scholarships at the MUSC College of Health Professions," "or "Benefiting breast cancer research at MUSC Hollings Cancer Center."*

Photos on MUSC websites are the property of MUSC, and reproduction of photos is not permitted without express, advance written approval from MUSC. You may seek such approval through the MUSC Special Event Liaison, but there shall be no guarantee that such approval will be provided.

You may develop your own Event branding, trademarks, and logos, but they may not incorporate or blend together any element or aspect of MUSC's branding, trademarks, or logos.

Promotion Guidelines

Publicity may not suggest that the Event is being sponsored, co-sponsored, or produced by MUSC or the Foundation. All publicity must specifically state within the marketing materials that the Event is *benefiting the Medical University of South Carolina, MUSC Hollings Cancer Center, or MUSC Shawn Jenkins Children's Hospital*, as applicable, and *proceeds from the Event will be contributed to The Medical University of South Carolina Foundation on behalf of MUSC.*

Funds raised can be used to provide unrestricted support or can be designated to support a particular division (i.e. Shawn Jenkins Children's Hospital, Hollings Cancer Center, Storm Eye, etc.), program, or area (i.e., neuroscience, heart, etc.).

Any promotion contemplated in the Event that includes you or a donor giving a percentage or an amount of the proceeds from the same of a good or service must state exactly the portion (either percentage or specific dollar amounts) that will be contributed to the Foundation.

- This information must be posted conspicuously wherever the MUSC name and/or logo may appear (e.g., all proceeds benefit MUSC; 25 cents from every dollar raised will benefit the Foundation; or 75% of the proceeds benefit MUSC, etc.).

If you use social media to promote the Event, please tag our fundraising account, @MUSCFoundation on Facebook, Instagram and Twitter, to alert the Foundation to potential opportunities to share content.

Expenses/ Permits/ Liabilities

You are responsible for covering all expenses for the Event.

You are responsible for obtaining all permits, insurance and licenses. We will not be involved, in any manner, with obtaining any permits or licenses required for the purchase or sale of alcoholic beverages.

MUSC and the Foundation are not liable for any damages or injuries sustained by you or your Event coordinators, volunteers, participants, or any other individuals or businesses in connection with your Event.

Change in Plans

If for any reason Event plans change, please notify the MUSC Special Event Liaison immediately, and we will work to make adjustments as soon as possible.

HELPFUL TIPS

You may realize from these guidelines that MUSC and the Foundation are separate organizations that work together for a common mission. The Foundation, acting as a supporting organization of MUSC, is responsible for the receipt and maintenance of charitable contributions to be used for the benefit of MUSC. Each organization has different, but complementary roles in fundraising activities, as articulated in these guidelines. To direct you to the appropriate organization as questions arise, provided below is a summary of the specific roles that MUSC and the Foundation respectively play in relation to your Event.

ROLE OF MUSC

MUSC is responsible for reviewing and approving all Event applications. An MUSC Special Event Liaison will approve Event applications and connect with you regarding details of your event.

MUSC will approve all branding, promotion, and licensing of MUSC logos or other intellectual property.

MUSC will provide any related promotional stories or announcements on our website and, as applicable, the MUSC event calendar.

In connection with your Event, the MUSC Special Event Liaison is available to answer any questions that you may have regarding these guidelines or otherwise.

MUSC CAN provide:

- Acknowledgement that you are conducting an MUSC recognized Event.
- Confirmation of the relationship between the Event and MUSC by providing a *Letter of Support*.
- The MUSC Fundraising Toolkit. The Toolkit includes:
 - Event ideas and success stories of other community fundraisers
 - Fundraising hints and tips to help You plan Your event.
 - Promotional samples, including approved MUSC logos.
- Coordination of Event representation or check presentation, if appropriate and staff available.
- Promotion of your Event on the MUSC online event calendar, time and space permitting.
- Review all printed materials to ensure proper use of MUSC-approved nomenclature and logos.

MUSC CANNOT provide:

- Funding or reimbursement to you for Event expenses.
- State tax exemption for event related purchases, sales, or admissions.
- Gift recognition letters or tax receipt letters to you, noting a charitable donation to a donor for tax filing or reporting purposes.
- Insurance or liability coverage to you or in connection with your Event.
- MUSC letterhead.
- Mailing/email lists of donors, patients, staff and/or employees for fundraising purposes and is unable to mail/email information on behalf of the event.
- Due to limited resources, MUSC staff, physicians, and faculty members may not be able to help plan, manage, and execute an Event with you.

ROLE OF THE FOUNDATION

The role of the Foundation is to receive the proceeds from your Event. The Foundation will provide tax receipts and gift recognition letter of charitable contributions to you, and will assist in that regard.

In terms of your transfer of the funds raised to the Foundation for the benefit of MUSC:

- If you are:
 1. **NOT** a 501(c)(3) organization, all checks shall be made payable to *The Medical University of South Carolina Foundation* and the Event proceeds should be mailed within 30 days to:

MUSC Foundation,
18 Bee Street, MSC 450,
Charleston, SC 29425.

 - Please note the institute or program designation (i.e., Children’s Hospital, Hollings Cancer Center, heart, etc.) in the memo line.
 2. A 501(c)(3) organization, the proceeds shall be mailed within 30 days (in one check) made payable to *The Medical University of South Carolina Foundation* to the address noted above.
- The Foundation will not accept funds from individuals or organizations that fail to comply with any municipal, county, state and/or federal law.
- The Foundation cannot convey or apply its federal tax ID number to you or your Event. You cannot use the Foundation’s 501(c)(3) status to apply for licenses, permits, funding, web domains, products and services. However, if a business makes a donation to the Event and would like the tax-exempt number for tax purposes or to verify the tax status of the Foundation, the Foundation will provide the information to the business upon request.

Application

MUSC Third-Party Fundraising Guidelines

Please complete this form and submit to:

Attn: Special Event Liaison
MUSC Office of Development
268 Calhoun Street, MSC 182
Charleston, SC 29425
Email: giving@musc.edu

Contact Information

Name of Individual/Organization/Group planning the Event:

Purpose of the Event:

Your Relationship with MUSC:

Event Contact Person:

Title:

Mailing Address Lines:

City:

State:

ZIP:

Phone Number:

Publicity Phone Number (if applicable):

Publicity Website (if applicable):

Email:

Fax:

Event Information

Event name:

Event date: XX/XX/XXXX

Time:

Event location:

Address:

City:

State:

ZIP:

Event description:

Has this event taken place before? Yes/No

If yes, when?

Please list any corporate sponsors that will be involved:

This event is: [] By invitation only [] Open to the public

Projected attendance:

Financial Information

Event ticket price (if applicable):

Percentage of gross sales to be donated:

Estimated gross revenue from event:

Values of goods and services received by each donor/attendee:

Expected date net proceeds will be given to The Medical University of South Carolina Foundation:

* * *

[RELEASE TO BE EXECUTED WITH APPLICATION]

I/we desire to host a fundraising event (the "**Event**"), with the goal to make one or more charitable contributions to The Medical University of South Carolina Foundation (the "**Foundation**") for the benefit of The Medical University of South Carolina ("**MUSC**"), its divisions, departments, and its governmental affiliate Medical University Hospital Authority ("**MUHA**"), MUSC Hollings Cancer Center and MUSC Shawn Jenkins Children's Hospital, or other MUSC affiliated department or entity.

I/we have read the then-current MUSC Third Party Event Guidelines, as amended from time to time by MUSC and the Foundation (the "**Guidelines**"), and reviewed the application process in full.

I/we agree to adhere to the Guidelines in planning and executing my/ our Event.

I/we understand that the Guidelines are not comprehensive and that all decisions for the Event, including safety precautions, remain my/ our responsibility as the third party fundraiser.

In order to be recognized by MUSC to conduct such an Event, and in addition to my/ our agreement to abide by the Guidelines, I/we hereby enter and agree with the terms of this release agreement and by so

doing fully, completely, and finally release and hold harmless MUSC, the Foundation, their respective affiliates, trustees, directors, officers, employees, and representatives (the “**Releasees**”) from any and all damages, costs, expenses, claims, and allegations that arise out of, related to, or in connection with my/ our Event and my/ our failure to comply with the Guidelines and applicable law, including any claims of third parties of any nature whatsoever. Upon execution of this release agreement, I/we release and hold harmless Releasees from any and all claims, damages, expenses, and causes of action, known or unknown, of whatever kind and howsoever arising, which I/ we now has/ have, ever has had, or may have had, whether at law or in equity, for, upon or by reason of any matter, cause or thing whatsoever against each and all of the Releasees in connection with the Event, my/ our activities in connection therewith, and the subject matter hereof. This Agreement shall be construed and enforced in accordance with the laws of the State of South Carolina.

I/we recognize and agree that MUSC, the Foundation, and all of their respective affiliates are not and do not accept or assume liability associated with the Event.

Signature:

Date:

Title/Name of Company or Organization: