Fundraising Projects
Benefiting Baylor College of Medicine
Event Proposal Guidelines

Thank you for contacting Baylor College of Medicine about raising funds to benefit the College and our mission of advancing human health through the integration of patient care, research, education, and community service. We appreciate your support and interest in raising funds and bringing greater awareness to BCM. These fundraising guidelines were developed to ensure consistent and high quality projects that are appropriate for the College’s reputation and commitment to excellence. Your project will be evaluated by the Office of Development and Alumni Affairs based on other BCM priorities, events and projects, and the potential demands on College resources.

To expedite the approval of your project and ensure its success, we ask that you:

A) Establish a clear plan for the project including the purpose, organizational structure, and dates and times for the project. Project organizers and BCM must abide by the Internal Revenue Service regulations governing charitable activities (I.R.S. Publications 526 and 1771). The Office of Development and Alumni Affairs follows Council for Advancement and Support of Education guidelines, which is the standard practice for academic institutions.

B) Submit a budget that includes all expected costs for the project (examples: venue, printed material, photography, rentals, etc.) and the sources of payment for these expenses. Expenses should not be more than 35 percent of the money raised. Upfront expenses, such as deposits, are the responsibility of the organizer, unless prior arrangement has been made with the individual department benefiting from the project. Your budget should include the following considerations:

Projects involving or requiring the assistance of Office of Development and Alumni Affairs staff and resources must raise a minimum of $300,000, net of expenses, for BCM. Please identify lead donors or underwriters (on the budget worksheet) with your application.

If the project will benefit another group in addition to the College, please describe how the money will be split. BCM must be a majority beneficiary with a minimum 51 percent beneficiary in order for the event to be approved. The College reserves the right to approve all co-beneficiaries.

BCM policies state that projects involving or requiring the assistance of Office of Development and Alumni Affairs staff will be charged for the percentage of staff time spent working on an event. Based on the amount of staff time allocated to an event, the corresponding percentage of the staff salary and benefits will be deducted from the event’s net proceeds. This will include event leadership, coordination, and administrative support. Funds spent on an event planner will also be deducted from the proceeds of the event.

For events raising money for non-strategic priorities, the gift assessment will be based on the net proceeds of the event. Twenty-five percent of all gifts will be used to support strategic priorities.

C) Determine if the minimum revenue to be generated meets BCM criteria (a minimum of $300,000 net of expenses) for assistance by the Office of Development and Alumni Affairs.

If so, checks for the project should be made payable to Baylor College of Medicine and sent to BCM, along with accompanying documentation, on a weekly basis. The department or program benefiting from the project must provide the staff and resources to process incoming gifts, sponsorships, tickets sales, etc.

Please note, if checks are payable to organizers, the donors cannot count them as charitable contributions unless the organizer is a charitable organization as defined and duly recognized by the I.R.S. If the project
organizers collect money, one final check for the net proceeds must be sent within 60 days following the project. A summary including an accounting of all income and expenses must accompany the check.

D) Submit the proposed mailing list/potential sponsors for the project in Excel (digital format).

E) Submit a calendar/timeline showing completion dates for all tasks related to the project along with the name of the person(s) responsible for each task (examples: mailing invitations, contacting vendors, staffing the event). Please note that the Office of Development and Alumni Affairs does not have the staff to implement all projects that benefit BCM; however, we would be happy to provide input and guidance to the project organizers upon request.

F) Submit all promotional materials (forms to collect money, save the date cards, sponsor letters, invitations, posters, etc.), including electronic media, that names BCM as a beneficiary of the project to the Office of Development and Alumni Affairs for approval. If approved, the Office of Development and Alumni Affairs will provide a camera-ready logo. Do not copy the logo from other sources. Please allow two weeks for approval. This is important to make sure that the College’s name and logo are used appropriately. Any changes made after initial approval must be resubmitted for approval.

G) Understand that the Office of Development and Alumni Affairs has set guidelines to support BCM’s administrative processes and to follow I.R.S regulations. Please note that we will adhere to the following guidelines:

The Office of Development and Alumni Affairs’ mailing list will be used only if specific criteria are met, including the project raising a net minimum of $300,000. The project organizers must provide stuffed and sealed invitations with the appropriate postage to the Office of Development and Alumni Affairs for addressing with labels at least four weeks prior to preferred mail date. BCM does not release its mailing list to third-party organizations.

Staff in the Office of Development and Alumni Affairs will not participate in the sale of third-party event tickets or merchandise (CDs, cards, t-shirts, etc.) to benefit BCM; nor will they solicit project sponsorships, including auction items and in-kind donations. BCM faculty may or may not be able to participate; involvement is at the discretion of the individual faculty member(s) or their department chairman.

Fair market value for ticket sales, in-kind donations, table levels, etc. must be defined and clearly stated on all promotional publications. Once the fair market value is published, no changes may be made to the sponsorship levels, ticket prices, or sponsor benefits. Per IRS guidelines, “The fair market value is the price at which the property would change hands between a willing buyer and a willing seller, neither having to buy or sell, and both having reasonable knowledge of the relevant facts.” (For example, the price per person for the event is $90, which includes $50 for lunch, $10 for valet parking and $30 for entertainment. If the cost of the ticket for the event is $200, the fair market value would be $90 and the donated portion would be $110.)

The College’s 501(c)(3) status may be used for in-kind donations that directly support BCM. However, BCM cannot use the status for anything that benefits primarily an individual or organization.

Events involving raffle sales, prior drawings, live animal auctions, and gambling will be prohibited. Baylor College of Medicine will not be held legally responsible for any act incurred by the organizer(s) of a project including, but not restricted to, personal injury or death; damage to, theft of, or loss of personal, private, or community property; for provisions of monetary prizes, or other gift items advertised by the project organizers. Baylor College of Medicine will not be liable for any expenses incurred by the project organizer(s). Some events may require a release from individual participants.
President and CEO and other College representation may be available for the event. Please make all requests well in advance. Availability, the date of event, and whether it raises money for a strategic priority will determine BCM representation at your event.

Please return this signed document (with all three pages initialed and dated) together with your completed proposal form, budget worksheet, and calendar/timeline to the Office of Development and Alumni Affairs for approval of your project or event no later than 5 weeks prior to distribution of your invitations and public announcements. A signed copy of this agreement will be sent to you immediately upon approval. All recurring projects must be submitted for approval on an annual basis.

Contact Helen Shultz (713-798-9090 or hcs1@bcm.edu), in the Office of Development and Alumni Affairs with questions about the above policies and procedures. Please return this information to:

Events
Office of Development and Alumni Affairs
Baylor College of Medicine
One Baylor Plaza, MS: BCM160
Houston, Texas 77030-3411
Fax: 713-798-3344

Signature Project Title Date

Signature of BCM Sponsor Title Date

Organizer Contact Information:
Name: ____________________________ Phone Number: ____________________________
Fax: ____________________________ Email: ____________________________
Address: ___________________________________________________________________

Your support is greatly appreciated!

Office of Development and Alumni Affairs Use Only

Date Approved by the Office of Development and Alumni Affairs: ____________________________

Signature of Development and Alumni Affairs Representative: ____________________________