VANDERBILT UNIVERSITY

Online Giving Crowdfunding Policy (GiveCampus)

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POLICY STATEMENT

This policy is a guide for conducting crowdfunding activities at Vanderbilt University. The goal of this policy is to ensure that crowdfunding projects raising money on behalf of a Vanderbilt University school, area or fund are consistent with the university's fundraising priorities, strategy, goals, messaging and branding guidelines.

POLICY SCOPE

This policy applies to all individuals and entities interested in raising funds for Vanderbilt University. The Vanderbilt Crowdfunding Platform is the "Approved Online Platform" and any other third-party crowdfunding websites, portals, or vendors are prohibited. No crowdfunding activities are allowed without explicit permission.

This includes but is not limited to:

1) Vanderbilt University faculty, staff, administrators and other individuals who represent the university, including students, alumni and parents.

2) Graduate and undergraduate students who are using crowdfunding in connection with their research, scholarly, creative or extracurricular work on Vanderbilt's behalf.

3) Outside groups, organizations, or clubs affiliated with Vanderbilt University who are raising funds for the university through use of a crowdfunding project or campaign.

POLICY

Roles and Responsibilities

An Affiliate/Affiliated Entity wishing to conduct a crowdfunding campaign will:

1) Seek initial approval according to the table below:

Entity	Approval Required From	Contact for Approval
Student Organizations	Vice Provost (VP), Vice Chancellor (VC), Dean of Professional/Graduate School or designee over the area they wish to fundraise for or Student Affairs	Student Affairs or Dean of Prof/Grad School
Faculty/Staff/Admin	Dean of their respective School/College or head of department or Provost/Provost designee	Dean of School/College, Dept. head or Provost
Alumni/Volunteer Groups/Clubs	Usual contact within Development and Alumni Relations (DAR); if no contact, reach out to Katelyn Law Bryan in the Office of Annual Giving (AG)	DAR contact or Katelyn Law Bryan/AG

2) Submit an application to the Office of Annual Giving via online submission form.

3) Provide a copy of any existing contact lists of people who will be invited to participate in the crowdfunding campaign.

The **Contact for Approval** will:

1) Review the request and determine its status as a fundraising priority.

2) Provide initial approval in written form to the Affiliate/ Affiliated Entity. Note that the DAR Office of Annual Giving will provide final approval for]crowdfunding initiatives.

The **Office of Annual Giving** will:

1) Confirm relevant approvals and review the online submission form completed by the Affiliate/Affiliated Entity.

2) Confirm that a gift designation exists for the area/student organization. For new gift designations, established university minimums and guidelines must be met as Gift Administration and the applicable Chief Business Officer. The DAR Office of Annual Giving will review existing designations to determine the number of donors who have supported and how much has historically been raised for the designated purpose. This analysis will help assess the feasibility of the proposed fundraising project.

3) Provide Affiliates/Affiliated Entities with guidelines for setting up a campaign within the Approved Online Platform.

4) Provide training and technical support for crowdfunding campaigns hosted on the Approved Online Platform.

5) Determine if additional solicitation and stewardship communications to an approved audience will be facilitated by Annual Giving Staff using a Vanderbilt email platform. This will not take the place of the Affiliate/Affiliated Entity's ability to leverage their social and professional networks.

6) Assess the Project/Campaigns for compliance and decide whether to give final approval

Policies and Procedures

1. Crowdfunding fundraising efforts on behalf of Vanderbilt University should not be initiated without approval from the appropriate contact from table listed above.

2. All student organizations must be officially registered, active and in good standing with the university to participate in crowdfunding efforts.

3. The crowdfunding campaign application must include a Project/Campaign description with a case statement/reason you are seeking support, the exact amount of funding needed, intended audience, group affiliation, fund to receive donations, timelines, and the names of at least two Project Managers/Campaign Leaders.

4. The project plan must specify the university account from which collected donations will be spent. The project plan should also include a contingency plan for scenarios where fundraising goals are not met. This contingency plan must be communicated to donors at the time of solicitation.
    a. Unrestricted Funds: If fundraising goals are not met, the collected donations will still be used to support the intended area or initiative.
    b. Endowment Funds: If the goal is to raise funds to create an endowment and the goal is not met, the funds will be allocated as outlined in the internal Gift Agreement or as deemed appropriate by the university.

5. Campaign Leaders will be assigned a Crowdfunding Advisor from the Office of Annual Giving to help with building a fundraising plan and provide training on setting up and managing the campaign within the Approved Online Platform. The Crowdfunding Advisor shall assess whether the Campaign is appropriately designed to be presented to potential donors and will ensure that it is consistent with the university's brand and overall development strategy.

6. Dollars raised from crowdfunding campaigns may not be used to pay for expenses related to crowdfunding. All operating costs should be covered by the Affiliate/Affiliated Entity and cannot originate from the same fund for which dollars are being raised. Donor intent must be honored, and gifts used only for the specific Vanderbilt purpose for which they were given. For example, a $1,750 charge to produce a video promoting the project or research cannot be paid with gifts derived from the fundraising campaign.

7. To ensure that donors receive appropriate gift credit for their donations, all gifts should be processed and receipted via the Approved Online Platform or via Vanderbilt's Gift and Donor Services Office.. While donors may mail in gifts or give via other formats, only gifts made online on the approved platform will be shown on the campaign landing page and goal tracker.

8. All gifts will be documented as donations to Vanderbilt University, and donors will be considered constituents of Vanderbilt University.

9. The approval to conduct a crowdfunding campaign gives Affiliates access to a platform for fundraising. However, Affiliates are responsible for marketing their campaign by leveraging their social and professional networks.

DEFINITIONS

"Affiliates" refers to Vanderbilt University students, faculty, staff, and administration and other members of Vanderbilt University-affiliated groups or organizations or other individuals who associate themselves with Vanderbilt University, including alumni and parents, who claim to represent and/or be raising funds for, Vanderbilt University or a Vanderbilt University Affiliated Entity.

"Affiliated Entity" refers to a group, club, or organization affiliated with or sponsored by Vanderbilt University. These include but are not limited to student clubs both informal and registered, alumni groups, an academic department, or a research laboratory led by a Vanderbilt University faculty member.

"Approved Online Platform" refers to the crowdfunding platform that Vanderbilt University has contracted for use in crowdfunding campaigns/projects, currently GiveCampus.

"Crowdfunding" is a fundraising effort that uses online technology to request donations from family, friends, and associates for a specific cause. A crowdfunding campaign is a short-term fundraising plan,

marketed and conducted entirely online and leverages social media to quickly and inexpensively spread awareness to potential donors.

"Campaign Leader" is the Affiliate who has proposed a crowdfunding Project/Campaign and is responsible for securing the necessary approvals for the Project/Campaign and for working with the Crowdfunding Advisor to conduct the Project/Campaign.

"Crowdfunding Advisor" refers to a member of Vanderbilt University's professional fundraising staff in Development and Alumni Relations - Office of Annual Giving assigned to work with the /Campaign Leader to ensure that the Campaign is consistent with the university's overall development strategy and to support the Project/Campaign, develop content, and answer questions as part of the Vanderbilt University Crowdfunding Platform administration.

CONSEQUENCES OF NON-COMPLIANCE

Any crowdfunding campaign that is initiated without the approval from the point of contact listed above or designee, and not through the approved platform, will be suspended.

PROCEDURES (Not required, but information in this section could be beneficial to have in policy.)

1. Review the requirements and policy for conducting a crowdfunding campaign
2. Secure approval from the point of contact listed above or designee
3. Complete the crowdfunding application
4. Once approved by the Office of Annual Giving, execute the campaign.
5. Steward/thank all donors to your campaign (do we want to remove or word differently to maintain control of this portion)

FREQUENTLY ASKED QUESTIONS (Not required, but information in this section could be beneficial to have in policy.)

1. Who can create a campaign through Vanderbilt's crowdfunding site?

   All Vanderbilt students, faculty, staff, and alumni can apply to create and launch a campaign on the Vanderbilts GiveCampus platform. To get started, reach out to your Contact for Approval as listed in this policy. Once you receive written approval, complete the Crowdfunding Request Form. Subsequently, someone will be in touch with you to review your application!

2. What are Vanderbilt's crowdfunding requirements?

   Eligible crowdfunding projects:

   o Are affiliated with Vanderbilt University
   o Are approved Vanderbilt clubs or have a sponsoring VU department, program, or center with a fund to receive donations
   o Are active, registered student organizations in good standing with the university
   o Are non-profit in nature
   o Have committed Campaign Leaders
   o Have specific goals and measurable impacts that could be reached in a period of several weeks

Once a project is approved for use through GiveCampus, Campaign Leaders will be required to provide the additional materials ahead of a campaign launch.

3. Why do I have to use Vanderbilt's crowdfunding platform?

Vanderbilt students, faculty, staff, and alumni who wish to use crowdfunding as a means of supporting their Vanderbilt-related projects must use the University's Approved Platform. This will ensure that the project is branded with the University's name and collateral, that gifts to the projects are tax deductible, and that Vanderbilt is equipped to recognize and steward those donors.

This will also ensure that no tax liability accrues to an individual as a result of receiving the funds personally through an external crowdfunding site. The funds will go directly into a university gift fund designated for the project's use and gifts will be properly receipted to the donors.

4. Are there any associated fees with this platform?

100% of each and every donation made through GiveCampus is directed towards the project! In contrast, other popular, non-Vanderbilt crowdfunding sites typically charge a fee and do not provide full gift support.

5. What if a crowdfunding project does not reach its fundraising goal?

This is one of the ways Vanderbilt's crowdfunding site is a little different from other crowdfunding platforms. Since an established fund is required to begin a crowdfunding project, all gifts that are processed by Vanderbilt will go directly to the program or initiative you've chosen to support, even if the goal isn't completely met. For endowed funds a Vanderbilt Gift Agreement is necessary to begin any group fundraising efforts. If the goal is to raise funds to establish an endowment and the goal is not met within the timeframe documented in the gift agreement, the funds will be allocated as deemed appropriate by the university.

6. Are gifts made through Vanderbilt crowdfunding tax deductible?

Yes, all gifts made to Vanderbilt are tax deductible. A gift receipt will be sent to each donor by the University's Gift and Donor Services team.

NOTICE/DISCLAIMER

This policy is not intended to cover every possible situation that may arise in the future with regard to crowdfunding. It is understood that exceptional circumstances will be addressed by the Office of Annual Giving, Development and Alumni Relations.