Morehouse School of Medicine:
Campus-wide Crowdfunding Procedures

Before crowdfunding, it is the project lead's responsibility to review and understand the following Morehouse School of Medicine Crowdfunding procedures. MSM reserves the right to revise these procedures at any time.

MSM's Crowdfunding Committee, in its sole discretion, will determine the eligibility of participating projects on the Scale Funder platform at http://crowdfunding.MSM.edu

- The Crowdfunding Committee may discontinue an active fundraiser at any time because of a project's failure to comply with these guidelines.

- All monies must be used for the project's stated purpose. Individuals are strictly prohibited from keeping any portion of the funds raised as a profit or compensation.

- All projects must be non-profit in nature.

- A Crowdfunding Contract, which outlines how the money will be spent, is a required agreement to be signed by the project lead before the page will be activated.

- There is 5% gift-processing fee per transaction through MSM Crowdfunding. Funds deposited into project accounts will already have these fees removed from their totals; however, project totals online will display the full amount and donors will receive credit for 100% value of the gift made. Projects must support MSM's programs and initiatives. Funds cannot be redirected to a third-party, external charity or other non-profit. MSM cannot act as a "pass-through" entity to provide funding to other charities.

When applying for MSM Crowdfunding, project leads agree to provide the following:
1. Project description and case for support
2. Images for description, social sharing and crowdfunding home page
3. Budget breakdown (how donations will be spent)
4. Project updates throughout the campaign
5. Ongoing outreach to promote the project after launch
6. Personal thank you messages after the campaign concludes to thank donors and let them know of their project progress

A. Morehouse School of Medicine Crowdfunding Platform

1. MSM is in its first year of a campus-wide crowdfunding platform to service campaigns or projects that use MSM resources. Information about this crowdfunding platform can be found at http://crowdfunding.MSM.edu

B. Definitions

1. **Crowdfunding:** the practice of funding a project or campaign by soliciting relatively small donations of money from a large number of people, typically via the Internet.

2. **Campaign or Project:** any type of crowdfunding initiated by MSM staff, faculty, and students; including, by way of example not limitation, crowdfunding research or scholarship, creative work (e.g. equipment, research projects, student mission trips, HEAL Clinics, etc.), non-profits or "social good" ideas, entrepreneurial ideas, or travel. This list is not exhaustive, and this definition should be construed broadly to encompass any/all crowdfunding campaigns initiated by MSM staff faculty, and students.

3. **MSM Resources:** refers to the use of MSM's branding, name or logo, MSM intellectual property, OIA Advancement Services, MSM IT or computing resources (e.g. MSM computers and Internet networks), MSM research or laboratory resources, or MSM facilities/equipment. This list is not exhaustive, and this definition should be construed broadly to encompass any/all MSM resources used in any crowdfunding campaign/project.

4. **MSM e-mail lists:** any and all e-mail lists containing contact information of MSM students, staff, faculty, administration, donors, and alumni. The MSM Crowdfunding program is designed to expand the donor base by soliciting new friends, family and other opportunities. Current donors, alumni, faculty and staff and students emails should not be in the design of your fundraising campaign. On a case by case basis, MSM Community emails may be considered.

5. **Appropriate approving official**: the highest-level official (or designee) in the MSM unit sponsoring or most closely affiliated with the campaign/project. For example, if the project seeks to crowdfund an aspect of research being conducted in the pediatrics department, then the appropriate approving official is the department chair or designee.

6. **Third-party crowdfunding:** any crowdfunding vendor, website or service provider (e.g. Scalefunder, Kickstarter or Indiegogo) not owned, licensed, or operated by Morehouse School of Medicine.

7. The terms "Campaign" and "Project" are used interchangeably.

C. Crowdfunding Campaigns/Projects That Do Not Use MSM Resources

1. Campaigns/projects that do not use any MSM resources or through 3rd party crowdsource do not require institutional approval; however, all fundraising must be approved by Morehouse School of Medicine Office of Institutional Advancement. All other Morehouse School of Medicine rules, policies, compliance regulations and state and federal law remain applicable to such campaigns/projects, including limitations on and policies concerning outside consulting.

D. Approval for Projects/Campaigns featured on the MSM Crowdfunding Platform

1. **Determine Campaign/Project Leader:** Campaigns or projects that use the MSM Crowdfunding Platform must designate a project manager/campaign leader responsible for seeking the approvals set forth in these procedures.

2. **Brand Approval:** Campaigns/projects that use MSM's name, branding, and/or logo require written approval by the appropriate approving official and the Vice President for Marketing and Communications.

3. **Initial Campaign Approval:** Initial approval for a campaign/project must come from the appropriate approving official in the MSM unit sponsoring or most closely affiliated with the campaign/project. For example, if the project seeks to crowdfund an aspect of research being conducted in the Neuroscience department, then the appropriate approving official is the department chair or designee. In addition, all campaigns/projects must also be approved by the appropriate administrator(s) or their designee(s) for example:

Campaign/Project Type	Appropriate Approving Official	Caveats
Student Research/Services	Student Advisor Department Chair	Must be approved by the student's advisor and the department chair. The advisor and the student are responsible for ensuring that the work proposed is in compliance with all campus policies and regulations as well as any laws, regulations, and policies, governing research.
Student Organization/Clubs	Student Affairs/ Research Department	Must be approved by the student's advisor and the department chair. The advisor and the student are responsible for ensuring that the work proposed is in compliance with all campus policies and regulations as well as any laws, regulations, and policies, governing research.
Faculty	Faculty Department Designee	Must be approved by the student's advisor and the department chair. The

		advisor and the student are responsible for ensuring that the work proposed is in compliance with all campus policies and regulations as well as any laws, regulations, and policies, governing research.
Morehouse Health Care	Department Chair	Must be approved by the student's advisor and the department chair. The advisor and the student are responsible for ensuring that the work proposed is in compliance with all campus policies and regulations as well as any laws, regulations, and policies, governing research.

4. **Timing:** Although the Crowdfunding Project Leader will assist with the approval process, all project managers/campaign leaders are encouraged to seek approval as early as possible as it may take up to 30 days for MSM approval decisions and campaign setup. All campaigns/projects must be approved in accordance with these procedures and the Crowdfunding Policy before they are published to, or go live on, the MSM Crowdfunding Platform.

5. **Develop a Project Plan:** Campaigns/projects that use the MSM Crowdfunding Platform must have a project plan associated with it.

    a. The project plan must include a campaign/project description, funding level sought, a clear overview of the budget identifying the use of funds, a set of deliverables, the timeline, and responsibilities.

6. **Campaign/Project Donations:** All projects must provide clear information to potential donors as to whether the donors will receive a receipt for tax deduction purposes. For projects/campaigns that are approved to use MSM resources, or MSM's campus-wide crowdfunding platform, determining whether donations are tax deductible must be done in consultation with the Associate Vice President for Development and Alumni Relations. Determining whether donations are tax deductible is a responsibility of the project manager and not MSM for any projects that do not use MSM resources and are hosted on third-party platforms.

7. **Project Rewards and Perks:** Any gifts, perks, or benefits associated with projects launched or hosted on any third-party crowdfunding site (and not the MSM Crowdfunding Platform) are wholly the responsibility of the campaign/project leader and not MSM. Campaign/Project leaders are cautioned that providing gifts or benefits in exchange for donations may alter the tax-deductible status of a donation; campaign/project leaders should consult with Morehouse School of Medicine with any questions regarding this issue.

8. **Appeals:** A project that does not receive approval as set forth in these procedures and the Crowdfunding Policy may appeal the decision to Morehouse School of Medicine's Senior Vice President for Institutional Advancement. Required forms and procedures can be found at http://www.msm/edu/crowdfunding.

E. Cost Requirements

1. Cover platform service fees as determined prior to initiation of campaign (5% contribution fee). (contribution fee policy)

Research: All funds raised through crowdfunding campaigns to support research projects are required to cover the total cost of conducting that research (e.g. use of space, materials, equipment, etc.).

F. Receiving/Spending Funds Raised

1. Establishing a MSM Fund
   Once your fundraising deadline ends, any collected funds are sent to the Advancement Services Office who works with Finance and put into a 'fund', which is typically a new fund created for the project. These funds are 'linked' to a department. Each fund will be assigned to the department/unit that the project is driven from.

2. Accessing funds raised:
   a. In a nutshell, you need to spend the money on your project. Look first and foremost at the budget you posted on the crowdfunding website. This is what you told the prospective donors you would spend the funds. While adhering to the budget exactly may not be feasible, any large deviation should have an appropriate explanation.

   b. Any funds in a MSM fund are subject to all school procurement rules. Essentially, this means you cannot just receive a check. If we handed out a check directly to the project manager, it is much harder to track how those funds were spent. You must spend the funds in line with donor intent, which will mean spending them on your project. If a donor were to ever come back and ask how the funds were spent, we need to be able to provide the appropriate documentation.

3. Guidelines for spending funds raised:

a. School procurement rules can be complex. One of the first orders of business is to work with an appropriate person in your department who is familiar with these. The Crowdfunding Project Leader can help you to identify this person and determine:

If you will be personally reimbursed for items (probably the likeliest option), you need to remember that just like any business expense, you need to document it and provide a business justification for it. Some questions to ask yourself:

- Is this for official project business?
- Is this adhering to my project budget?
- If a donor asked me how I spent my money, would I be comfortable telling them about this purchase?
- You will likely be reimbursed for items in a lump sum, not an individual basis. If this is untenable from a personal financial perspective, work with your departmental contact to see if they can use their Procurement Card (Pcard).
- Remember that paying someone for work is not always an easy process. Are they, or yourself, already an employee and can be paid through their existing payroll? Is it a non-employee who would need to be set up as an independent contractor? Again, we need a business justification for paying someone. We can't just say we want to give Joe Smith $500. We need to state what he did for the project.

The Crowdsource Funding Committee:

1. Ms. Michele Thomas, Project Leader, Office of Institutional Advancement
2. Dr. Janice Herbert-Carter, Chair of Medical Education or Designee
3. Dr. Stephanie Miles- Richardson, Director of MPH Program and Associate Professor or Designee
4. Dr. Ngozi Anachebe, Associate Dean Student Affairs or Designee
5. TBD- Associate Vice President for Advancement Office of Institutional Advancement
6. TBD- Student Body President