

Handbook for Chapter Presidents

Revised January 2025

Mission Statement

Brandeis National Committee is dedicated to providing philanthropic support to Brandeis University, a distinguished liberal arts and research university founded in 1948 by the American Jewish community. Its membership is connected to the University through fundraising and through activities that reflect the values on which the University was founded: academic excellence, social justice, non-sectarianism and service to the community.

Dear Chapter President,

Thank you for your commitment to Brandeis National Committee and Brandeis University. We deeply appreciate that you have taken a leadership role with your BNC chapter and recognize that you are making an important commitment to the success of BNC and the support of Brandeis University.

This handbook is a guide to assist you in the leadership of your chapter that will be supplemented by additional handouts, emails and training sessions. Each BNC chapter is unique. Not all policies outlined in the handbook will apply to your chapter.

The Board of Directors and the BNC national office staff are ready and able to answer any questions or concerns you may have. We truly want you to be successful. We are just a phone call or email away.

Again, thank you for all your hard work,

Merle Carrus P'12

National President

603-490-1957

merlesoffice@gmail.com

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Board of Directors Officers 2023 - 2024

President: Merle Carrus

603-490-1957 merlesoffice@gmail.com

Recording Secretary: Audree Dyson

508-668-8122 beadesigns@comcast.net

Members:

Merle Carrus

Audree Dyson

Michelle Y. Fischler

Mindy Frankel

Madalyn Friedberg

Bruce Litwer '61

Francoise Marcus

Maxine Schweitzer

Andrew Tievsky

National Center Staff

The National Center staff provides professional support and materials to all chapter personnel in the performance of their responsibilities.

Brandeis University 415 South Street Waltham, MA 02454

781-736-7588

888-862-8692

bnc@brandeis.edu www.brandeis.edu/bnc

	Name	Telephone	Email
Director	Ingrid Schorr	781-736-5008	ingrids@brandeis.edu
Finance & Operations Administrator	Aby Ogoke	781-736-4024	abyogoke@brandeis.edu
Assistant Director, Chapter Relations & Member Services	Nicole Perryman	781-736-4171	nicoleperryman@brandeis. edu
Senior Development Coordinator	Sabrina Rossi	781-736-4166	srossi@brandeis.edu

Presidential Responsibilities

As Chapter President, you have the privilege and responsibility to represent the BNC and Brandeis University to your chapter and in your community. The following are the major responsibilities of a Chapter President and the resources available to assist you. In addition to using these resources, be sure to consult with past presidents and officers at the beginning of your term as well as members of the national board of directors who belong to your chapter. They all bring valuable skills, resources, and counsel.

- Preside at all official meetings of the membership and board
- Be conversant with current developments at Brandeis and share information provided by the National Center and other sources
- Provide the National Center with your board roster and send notification of any changes
- Provide direction to your board and committee chairs for achieving chapter goals
- Inspire, mentor, and develop future chapter leadership on your board by sharing responsibility
- Encourage members to be active participants

An active member will:

- Know and support the BNC mission and communicate it to the wider community
- Be conversant about current developments at Brandeis University
- Know about chapter projects, plans, and goals
- Attend and support chapter events and offer assistance as needed
- Encourage new members to participate in chapter activities
- Accept appointments to project committees

Fulfilling the BNC Mission of Supporting Brandeis University

As President, you play an important role in your chapter's financial support of Brandeis University. BNC fundraising is accomplished in many different ways, and gifts of every size contribute to ongoing support of the university, including our fundamental support of the library.

Your chapter may designate the money you raise to any of the following:

Library Funds

- Book Purchase Fund
- Special and Major Book Collections
- Learned Research Journals
- Library Work Scholar (to support an undergraduate student)
- Library Technology Fund
- BNC Library Collections in Judaica

Endowed Funds

In addition to supporting the Brandeis University library, the chapter may raise funds for endowments to support professorships, research, and/or scholarships. Endowed funds are invested and the interest earned is used for the purpose of the fund. Individual gifts of \$50,000 and above (payable over a period of 3-5 years) will bear the name of the donor or the honoree. Individual donors of \$1,000 and more will be recognized as Sustainers of the campaign, and their names will be listed on the BNC's campaign website.

- **Engineering the Future: The BNC Professorship in Engineering Science.** Provides a tenured faculty position in the new Engineering Science program. This is BNC's current fundraising campaign and is a major priority for the university. Your gift to Engineering the Future will have the most impact of any BNC fund.
- **BNC Scholarship Fund:** Need-based support for undergraduate students. In addition to the BNC Scholarship fund, your chapter may have its own endowed fund.
- **Sustaining the Mind.** BNC has met its fundraising goal for this 2011 campaign and is no longer actively supporting it. However, if your chapter or an individual wishes to make a donation to Sustaining the Mind, the funds will be used either for neuroscience research or for undergraduate scholarships in neuroscience.

Forms of Fundraising

- Chapter events
- Gifts from individuals. Chapters are asked to encourage individuals to donate to their preferred fund at Brandeis. Individual donors of \$1,000 or more to Brandeis during a fiscal year become members of the Justice Brandeis Society and are invited to special lectures, receptions and gatherings throughout the year.
- Planned gifts and bequests, also known as legacy giving, are gifts made in a donor's lifetime or at death as part of financial or estate planning. A legacy gift can be made from a retirement account, a life insurance policy, real estate, or other financial resources such as stocks or bonds. Planned giving donors become members of the University's prestigious Sachar Legacy Circle. For more information, please email plannedgiving@brandeis.edu or call 781-736-7719.

How to Make an Individual Gift

Individuals may make a gift using a credit card via Brandeis University's secure online giving form at giving.brandeis.edu/bnc. Brandeis accepts American Express, Discover, MasterCard, and Visa. To make a gift by phone, call 781-736-4000 or 800-333-1948 (toll-free). Brandeis cannot accept cash gifts.

For instructions for mailing a gift, making a wire transfer, or transferring money from an IRA or securities fund, please visit alumni.brandeis.edu/giving/how

PHILANTHROPY

Since 1948, BNC has supported the University through membership dues, study group fees, individual giving, and fundraising events.

TOTAL GIVING TO DATE: \$178,077,536

CURRENT CAMPAIGNS

ENGINEERING
THE FUTURE

LAUNCHED DECEMBER 2024
TO FUND THE BNC
PROFESSORSHIP IN
ENGINEERING SCIENCE
(\$3 MILLION GOAL)

BNC LIBRARY
FUND

GENERAL LIBRARY SUPPORT

+ FUNDS FOR BOOK
COLLECTIONS, LIBRARY
TECHNOLOGY, SCIENCE
JOURNALS, JUDAICA, ETC.

BNC SCHOLARSHIP
FUND

PROVIDES NEED-BASED
SCHOLARSHIPS FOR
UNDERGRADUATE STUDENTS

PLANNED GIFTS

GIFTS MADE FROM A RETIREMENT
ACCOUNT, INSURANCE POLICY,
REAL ESTATE, OR OTHER
RESOURCES SUCH AS
STOCKS AND BONDS

COMPLETED CAMPAIGNS

SUSTAINING THE MIND

LAUNCHED IN 2010 TO
SUPPORT NEUROSCIENCE
RESEARCH AND
SCHOLARSHIPS
RAISED \$3.8M



MAGNIFY THE MIND

LAUNCHED IN 2018 TO
PURCHASE A TWO-PHOTON
RESONANCE MICROSCOPE.
RAISED \$987K



Revised 2025

Communications with National

The National Center staff are here to support the chapters and uphold the mission and policies of Brandeis University. The more we know about your chapter activities, the more we can support your hard work. Please maintain regular and productive communications by:

- Providing the National Center with your board roster and sending notification of any changes
- Sending your bulletins and board meeting minutes regularly to bnc@brandeis.edu
- Attending monthly Tea with the Team meetings with the other chapter presidents and National staff

Branding and Logo

Please use the Brandeis/BNC logo on chapter communications including bulletins and flyers. If you incorporate the logo into your chapter logo, do not modify the Brandeis portion. You may download the logo from the BNC website under Member Resources.

The Brandeis University name, seal, and logos are protected trademarks and may not be used for private, commercial, promotional, or political purposes, or for the advertising of any product or service not related to Brandeis National Committee.

Board Roles and Responsibilities

The cooperation of all members of your Board is essential in carrying out the programs of the chapter and the mission of Brandeis National Committee. The following represents a sample board composition. Because you best know your chapter's needs, you might not need to fill every position listed.

Board Officers

President or co-President(s), Vice President(s), Chapter Treasurer(s), Corresponding Secretary(s), Recording Secretary(s), Chapter Information Officer(s)

Chairs & Committees

Membership (*multiple chairs*), Book Fund, Book Sales/Bookstore, Special Events and/or Projects, Fundraising (*multiple chairs*), Digital Communications

Vice President(s)

The president looks to the vice president(s) to share the chapter's leadership responsibilities. The vice president(s) supervise and coordinate a number of specific chapter projects and act as the liaison between the chairs and the president.

Responsibilities:

- Assist the president in chapter administration and planning for chapter activities
- Perform duties of the president, if necessary, according to chapter bylaws
- Supervise and assist your chairs in organizing committees and planning and executing chapter projects
- Know National material and help your chairs use it effectively
- Contact your chairs periodically to check in on their activities and offer productive suggestions
- Work with other vice presidents when joint planning and action are required
- Facilitate transition at the close of your term by orienting new vice presidents

Treasurer

The responsibilities of the Chapter Treasurer are found in the Treasurer's Handbook, posted on the BNC website under Member Resources. Please note that the Chapter Treasurer must be a full-time resident of the Chapter's location. You may choose to divide the responsibilities between an accounts receivable and an accounts payable officer.

Please make sure your treasurer is prepared to safeguard against financial fraud. The following information is included in the Treasurer's Handbook.

Safeguard Against Fraud

(updated January 2025)

Spam, phishing, spoofing: These are all ways to describe financial fraud by email. In 2024, several BNC chapters were targeted by someone posing as the president of the chapter who emailed the treasurer with an urgent request to wire money or send a check for chapter expenses.

We cannot emphasize this enough: **DO NOT TRUST EMAIL.**

Email is easily faked or spoofed. Spammers will send an email message that appears to have come from a bank, your cell phone provider, or from any organization that you may have legitimate reason to share financial information with. The email may appear authentic – it may have the correct originating address, for example – but that doesn't mean it was sent by the owner of the email address.

The person at the other end of the email could be trying to steal money from you.

Anytime you receive a request for a wire transfer or a check, even if it appears to be from somebody within your organization, you must confirm with them by phone. Replying to the e-mail is not sufficient confirmation of their identity.

Before you even consider sending a check to anybody, you must have an invoice and have it approved by your chapter president and another officer designated by the president.

To learn more about common types of scams, visit the [Consumer Financial Protection Bureau website](#).

Corresponding Secretary

The Corresponding Secretary receives and acknowledges correspondence in consultation with the president.

Responsibilities:

- Notify members of board meetings, special, and general membership meetings.
- Prepare correspondence as requested by the president and board, and maintain an accurate and accessible file of correspondence.
- Read pertinent current correspondence at meetings.

Recording Secretary

The Recording Secretary records the official account of your chapter's administration.

Responsibilities:

- Record attendance at board meetings and take clear, concise, and accurate minutes at all board, advisory, and general membership meetings
- Email a copy of the minutes, with name of chapter at the top of the page and in the email's subject heading, to the chapter president, the region president (if applicable), and to bnc@brandeis.edu as soon as possible after each meeting.
- Keep minutes in a permanent record book, with separate notations of motions passed, amendments to bylaws, and changes to chapter policies
- At meeting, read minutes of previous meeting and record corrections
- At the close of your term in office, turn over all records to the incoming recording secretary. These constitute the official archives of the chapter and must remain in the possession of the incumbent recording secretary.

Chapter Information Officer

Chapter Information Officers browse the BNC and Brandeis websites, newsletters, and social media for information to share with their chapter members, including the president and bulletin chair, for inclusion in chapter updates.

Responsibilities:

- Visit Brandeis University websites such as Brandeis Stories to find interesting and pertinent information about BNC and Brandeis University to share at board meetings, general meetings, and study groups
- Prepare a short summary for your bulletin chair to include in the next issue

- Share chapter information with the National Center by submitting photos and details about events

Fundraising Events Chair

Your chapter's special events and projects fulfill BNC's philanthropic mission to support Brandeis University. They also project the image of your chapter and the University in your community. When planned well, a major event or project can attract widespread interest and prospective members and will go a long way toward achieving your chapter's financial goals. For additional information on fundraising events, please refer to the Handbook for Special Events/Projects on the BNC website under Member Resources.

Responsibilities:

- Start planning early. Enlist the support of a large committee and the entire executive board. Decide how you will designate the proceeds of your event.
- Develop an event budget in consultation with your chapter president and treasurer. Include printing, mailing, publicity, theater tickets, deposits on space or services,
- Consider carefully the project costs, as well as the potential profit of the project
- Charge enough to make a profit. Have more than one ticket price, such as patron/angel/friend; sell Book Fund items; publish an ad/tribute book.
- Forward contracts and insurance requests to the National Center at bnccontracts@brandeis.edu for signature. ***Chapter officers are not authorized signers for vendor or facility agreements.***

It is a chapter's responsibility to issue all receipts in connection with an event, using the event receipt provided by National. See the Tax Information section of the Appendix.

It is in our interest as a fundraising organization to ensure that our donors receive accurate receipts in order to claim tax deductions for charitable gifts. After an event, work with your treasurer to complete a Special Event Financial Report in order to send profit to National.

Additional guidelines:

- BNC chapters may not hold sweepstakes or raffles. This is University policy.
- Silent auctions, unlike raffles or other games of chance, are permitted as they are not considered to be gambling. Chapters may conduct silent auctions in conjunction with their fundraising events. See Guidelines for the Conduct of Chapter Activities in Appendix.

- Information on developing a chapter travel program is included in the Appendix. If your chapter decides to travel and fundraise, please contact Aby Ogoke in the National Center, abyogoke@brandeis.edu, about mail, tax, and liability requirements

Book Purchase Fund Chair

Responsibilities:

- Use the Book Fund and Event Receipt books from the National Center, These are a specific type of receipt that chapters use for tracking gifts and acknowledgements for members. Request these materials using the supply order form on the BNC website.
- Ensure that chapter receipts are available at all meetings and study groups
- Acknowledge contributions to donors and recipients promptly. Gifts of \$1,000 or more are acknowledged by the National Center upon notification.
- Send all receipts and monies to chapter treasurer monthly, or directly to the National Center. Each receipt should include the donor's name, address, and designation. Send contributions of \$75 or more directly to the National Center.
- Provide a list of contributors for your chapter bulletin to help promote the fund
- Publicize the link to the BNC Giving Page, giving.brandeis.edu/bnc, with instructions to select BNC Book Purchase Fund as their designation
- Orient incoming chair and turn over all records and materials

Bulletin Chair

The chapter bulletin is the first line of communication with your BNC community. It attracts attention to your activities and promotes programs and study groups. Your chapter bulletin gives members an insight into the quality and vitality of your chapter programming.

Responsibilities:

- Include material about Brandeis University. Check with your Chapter Information Officer about possible items, including from the BNC newsletter.
- At least one per year, include a complete list of board members, with email addresses and telephone numbers, including the bulletin editor
- Include a message from your chapter president, prominently placed.
- Include the BNC mission statement
- Send a copy of each bulletin or newsletter to National at bnc@brandeis.edu

Editorial guidelines

Display the BNC logo, available from the BNC website under Chapter Resources, on the front

page of the bulletin.

- Be sure to add the month and year under the banner. You may include the president's name, phone number, and email here if you choose.
- A visiting Brandeis professor is a highlight of chapter programming. Please make sure to advertise your University on Wheels event prominently in your bulletin
- Make sure you include contact information with all of your events

Mailing guidelines

- If you are mailing the bulletin, the return address on the back page should read: Brandeis National Committee Chapter name + home address of bulletin editor
- As a part of Brandeis University, your chapter may mail at nonprofit rates. Check with your local post office for bulk mailing requirements. The Brandeis nonprofit indicia must appear on the upper right corner of the address page.

Membership Chair

Membership is vital to the continued success of the Brandeis National Committee. Personal touches make the difference in building and retaining your chapter's members. Everyone involved in membership should create a welcoming and positive experience at each event.

Responsibilities:

Depending on your chapter's size, build a membership team to help achieve your goals and to connect with new and continuing members. Chapters have created the following chairs: annual membership, renewal/retention, and orientation. For more information, see the Membership Handbook on the BNC website under Member Resources.

Planned Giving Chair

Planned giving, also called gift planning or legacy giving, is any major gift, made in lifetime or at death as part of a donor's overall financial or estate planning. A legacy gift can be made from a retirement account, a life insurance policy, real estate, or other financial resources such as stocks or bonds. Planned giving donors become members of the University's prestigious Sachar Legacy Circle, named in honor of Dr. Abram L. Sachar, the first president of Brandeis University.

Responsibilities:

- Publicize in each issue of your chapter bulletin the importance of remembering the University or its libraries with a planned gift. Through thoughtful gift planning donors can make the gift of a lifetime, one that reflects their values and leaves a lasting benefit to students, faculty, programs and facilities for years to come. More information about

planned giving may be found at www.plannedgiving.brandeis.edu.

- Refer all inquiries for information to the Office of Planned Giving at Brandeis, at 781-736-4000 or plannedgiving@brandeis.edu for a confidential consultation.

Bylaws Chair

It is beneficial for chapters to adopt and be governed by their own bylaws. The bylaws should accommodate the Rules of Association that govern the Brandeis National Committee and follow the Model for Chapter Bylaws, both of which are found on the BNC website under Member Resources.

Responsibilities:

- Make certain your bylaws reflect any changes made in BNC's Rules of Association
- Prepare amendments to your bylaws whenever necessary
- Present amendments to your chapter for adoption in accordance with the provisions of your bylaws

Nominating Committee Chair

Responsibilities:

September

- Before the first committee meeting, meet with your president (and parliamentarian, if you have one) to discuss vacancies and term limits. See March/April section below regarding term limits.
- At the committee meeting, request recommendations from the board and Study Group leaders.

December/January

- Request recommendations from board members and Study Group leaders not present at committee meeting
- Arrange to include recommendation request in next bulletin
- At board meeting, review vacancies. Re-election is not automatic. The candidate must be recommended by someone.

January/February – Agenda for Nominating Committee Meeting(s)

- Only elected committee members may be present; a chapter president is not an ex officio member
- Criteria for discussion: confidentiality, objectivity
- Criteria for selection: Job description, qualifications, past performance

- Slate: President; other officers; Directors; Nominating Committee for next fiscal year
- Assign committee to call prospective nominees; describe positions and responsibilities, including required attendance at board meetings; schedule return calls

March/April – Report to Board and Membership

- Present proposed slate according to chapter bylaws (no vote).
- Slate will consist of a candidate(s) for each board position, including the chair(s) and members of the Nominating Committee, Chapter President(s), Vice President(s) for portfolios, Treasurer(s), and other officers, in accordance with any existing term limits. When term limits are first incorporated, they will not apply to those currently serving. If they wish to do so, they can remain in the same position(s) for an additional term, and the committee will not nominate an additional candidate(s) from the floor for their positions.
- Notify members of the annual meeting. Submit a copy of the notification to the bulletin editor for inclusion in the spring bulletin. Present slate at annual meeting.

May/June – Presentation of slate at annual meeting

- The president calls on the Chair of the Nominating Committee for its report
 - a) “The duly elected Nominating Committee (read names) presents the following slate of officers” (start with president, then officers, board, and Nominating Committee)
 - b) “I move the adoption of this slate.”
- President calls for nominations from the floor; makes a motion that nominations be closed and that the secretary be instructed to cast one ballot for slate as presented by the Nominating Committee. Motion to be seconded.
- Vote

Facilitate transition at the close of your responsibilities by orienting the incoming chair.

Program Chair

The program chair champions programming as a way to build and maintain enthusiasm for Brandeis University and the BNC. Your committee should be a large one, composed of some people who can generate original ideas, and some who can follow through on details so that a good plan is executed successfully.

Responsibilities:

- Include at least one event with a representative from Brandeis or the BNC, for example a professor, student, alumnus, administrator, or BNC National board member or director

- Pursue a vigorous study group or special interest program that includes the use of Brandeis faculty-authored materials
- Provide outside speakers with information and material relating to Brandeis and the role and purpose of the BNC
- Include costs of program in your budget
- Orient incoming chair

Many members participate in events that require physical activity such as biking, hiking, and yoga. Because these activities involve a certain amount of risk, we ask that you collect a signed Acknowledgement of Risk and Release Agreement from each participant. (See sample form in Appendix.) It is important to keep completed forms on file for the year.

Chapters should avoid scheduling a study group or special program that is likely to serve as a way to solicit business by the speaker or facilitator. For instance, financial services or medical professionals may offer to conduct a free workshop. It is common practice in these industries to use these opportunities to solicit business. Your chapter should not accept such offers. Sponsorship of such a workshop may imply endorsement that could lead to liability problems.

Publicity Chair

Your chapter publicity is the means of communication to the external community, projecting awareness of your chapter image and of Brandeis University. A committee to share responsibilities is recommended.

Responsibilities:

Be knowledgeable about Brandeis University and the Brandeis National Committee, especially current developments; the role and relationship of the BNC to the University, and its purpose and objectives. Read National materials and the following BNC and University websites:

BNC National brandeis.edu/bnc Brandeis University brandeis.edu

Brandeis Facebook facebook.com/brandeisuniversity

Brandeis Stories brandeis.edu/stories/

- Work with your chapter information officer to coordinate publishing news from Brandeis
- Meet with your committee to discuss
 - a) Personal contacts with key newspaper personnel
 - b) Radio or television interviews or announcements (community service time may be available on local stations), and how to make these interesting and significant
 - c) How to write a press release
- Send invitations for special events to community leaders to attend as your guest and

arrange for appropriate welcome, introductions, etc.

- Send information on newsworthy chapter events to the National Center
- Include a brief description of Brandeis University and the BNC (available from the National Center) at the conclusion of every press release and story about Brandeis
- Let the National Center know when your chapter has been featured in any print or online publications
- Orient incoming chair and transfer all pertinent materials and information (especially names of communications personnel)

Members at Large

Some chapters have members at large who are in charge of planning events or help plan events, set up events, or any task that is necessary. Some are former board members and some are new members who want to serve in a smaller role.

Event Invitation Guidelines

Make sure that your event chair(s) understand these guidelines. Please share event invitations or flyers with National before sending them out to your membership. If you have questions, please contact abyogoke@brandeis.edu

Designating funds

- If your chapter wants to designate proceeds from an event to a specific Brandeis fund, this must be stated on the invitation or flyer and in chapter bulletins and emails.
- Proceeds from undesignated events and projects (including study group fees) will benefit the BNC Library fund.

Establishing the fair market value (FMV) of the event

- Determine the amount it would cost the donor to purchase the elements of the event. If it is a meal, you would calculate the cost of the venue, food, entertainment, parking, etc., and divide by the number of guests. The figure should be consistent with what it would cost the donor to purchase similar services. It is irrelevant whether the costs are purchased at a discount or are underwritten.
- *Disclosure - for event prices of \$75 or more:* You must clearly state what portion of the payment is not tax deductible, because it represents the fair market value of goods or services received in exchange for the donation. We recommend that you provide the information on the invitation as well as the receipt.
- *Substantiation - for event prices of \$250 or more:* In order for donors to claim tax deductions for payments of \$250 or more, the BNC must provide the donor with an Event Receipt; it states which portion of the payment is tax deductible.

Providing receipts for donations

- *Provide receipts for donations of \$75 or more:* When goods or services are provided in return for a donation of \$250 or more, the taxpayer is required to provide the IRS with a receipt that states which portion of the payment is tax deductible for donations. We recommend that you provide a receipt for donations of \$75 or more as insurance that you have fulfilled the BNC responsibility to disclose information on the actual value of the tax deduction.
 - Use the Special Event Report available from National. The receipt must provide:
 - Amount of payment (the cost of the event)
 - Fair market value of the benefits received
 - Tax deductible value – subtract the fair market value from the total payment
- Check local and state requirements for sales tax and licenses for certain types of events.*

Frequently Asked Questions

- ***We have secured a discounted ticket price for a theater outing. What is the fair market value in this situation?***

According to the IRS, fair market value would be the regular price of the ticket. The tax deductible portion of the payment would be equal to the total, less the regular ticket price. The fact that the chapter was able to obtain tickets at a group rate is irrelevant to the fair market value. The regular ticket price is what it would cost the donor to purchase on his/her own.

- ***How do we place a value on the cost of an underwritten event?***

A "good faith" fair market value is calculated by estimating the amount that it would cost the donor to purchase the elements of the event (food, beverage, parking, entertainment, etc.). For example, if a member donates the use of her home for a cocktail party in return for a donation at a certain level, the invitation should include the fair market value of the event established on the basis of what it would have cost to hold the event in a hotel. This would include costs of food, beverages, parking, facility rental, etc., divided by the anticipated number of people who will attend.

- ***We are planning a Book Fund luncheon for donations of \$350 or more. Some attendees may expect the donation to cover the costs for a couple. What must we do to meet the new requirements?***

1. Consider charging a cover, which separates the cost of the luncheon from the actual donation. State on the invitation that admission to the luncheon is a donation of \$350 plus a per-person cover of your estimated fair market value for the luncheon (including cost of meal, the facility, parking, entertainment, etc.). In this case, the donor will receive a receipt stating that the tax deductible value of the donation is \$350. The advantage of this approach is that it maintains consistency for the levels of giving for BNC funds.
2. If you choose not to charge a cover, state on the invitation:

Under the Internal Revenue Code, the amount of this gift that is tax deductible for federal income tax purposes is limited to the excess of the amount paid (\$350) over the benefits received. The fair market value of the luncheon has been set at (your fair market valuation) per person. Thus, the value of your gift for the purposes of the charitable tax deduction will be \$350 less the (fair market value) times the number of persons attending.

Include this information on the invitation, so the receipt will be clear to the donor. Also, be certain that the fair market value is stated as a per person expense. In either situation, a receipt is required, given that the individual will be issuing a check for more than \$250. It is the responsibility of the chapter to issue the receipt.

Appendix

Guidelines for the Conduct of Chapter Activities

Please share the following information with anyone in your chapter who manages or plans activities including programs, special events, and study groups.

Brandeis National Committee chapters conduct many excellent activities to raise money and provide inspiration and a connection to Brandeis University. All of our activities carry the name of Brandeis, are a reflection of the University and the BNC, and should serve to enhance the reputation of both. In order to maintain our reputation, specific BNC guidelines have been developed to serve as a helpful tool in planning your activities. We are confident that as you continue with your superb programming, you will at the same time adhere to these standards.

Activities that fulfill the BNC fundraising mission or bring inspiration and connection should continue and serve as models.

These activities include University on Wheels, Book and Author, book sales, lectures, luncheons, membership teas, showcase meetings, study groups (especially those using Brandeis-authored materials). Activities might also include trips to museums, historical sites, and educational sessions.

Silent Auctions

Silent Auctions, unlike raffles or other games of chance, are permitted because they are not considered gambling. Hosting a silent auction allows donors to actively participate in an event and maybe even make an exciting purchase. In addition, because the items being auctioned have been donated to the organization, the nonprofit does not spend any money to obtain them. Interested in holding a silent auction? Contact the National Center. We will go over the guidelines with you and answer your questions.

Raffles, Drawings, and Door Prizes

Paid raffles or drawings are considered gambling and are not permitted. Chapters may offer door prizes if all attendees have an equal chance to win and there is no money involved.

Honoraria and Fees for Service

- Authors typically do not charge a fee or honorarium when they give a talk or reading at your Book and Author or other event. They may sell copies of their books. Remind authors that they are supporting a fundraising event. However, if they lead a writing workshop or present research prepared especially for your chapter, it is appropriate to pay them for those services.
- Chapters should avoid scheduling a study group or special program that is likely to serve

as a forum for the solicitation of business by the speaker or facilitator. For instance, financial services or medical professionals may offer to conduct a free workshop. However, it is common practice in these industries to use these opportunities to solicit business. Your chapter should not accept such offers. Sponsorship of such a workshop may imply endorsement that could lead to liability problems.

Non-Brandeis University Activities

The BNC's mission is to provide philanthropic support for Brandeis University. While members and chapters are encouraged to be involved as volunteers in their community, they may not use the Brandeis name to solicit funds for other causes, political campaigns, or nonprofit organizations.

Political Presentations

- Political presentations should present multiple points of view for balance. Chapters should refrain from inviting a politician or their representative to speak during an election year.
- Members must not use the name, seal, or logo of the University in a way that implies official University endorsement of a political candidate or political position.
- Chapters may not use their websites to post campaign literature or to endorse a political candidate.
- Members may not send political messages by using BNC or Brandeis University email addresses.

Tax Issues: Common Questions

- ***What happens if we fail to provide information on the fair market value of goods or services received in return for a donation?***

Failure to disclose this information can result in a \$10 fine per contribution up to a total fine of \$5,000 per event.

- ***What would be the impact of failing to provide a receipt for a \$250 or more donation?***

It is the responsibility of the donor to obtain a receipt. The donor will not be able to claim a tax deduction for the gift without one. In order to establish and maintain good donor relations, we must accept the responsibility for issuing receipts in a timely manner.

- ***What if a donor requests the issuance of a receipt which misrepresents the fair market value of what s/he received?***

The penalty for issuing a false receipt is a fine of \$1,000 per donor. Further, complicity in trying to avoid the requirement for substantiation through the acceptance of multiple checks is also fineable.

- ***What do we do if a donor requests a receipt several months later?***

Please contact bnc@brandeis.edu

Contracts

Please share the following information with anyone in your chapter who manages or plans activities including programs, special events, and study groups.

Many of your events, for example luncheons and day trips via chartered bus, require contracts to be approved and signed by both the vendor and the BNC. Per University policy, ***in no instance may a chapter member sign a contract.*** The reason for this policy is twofold: it protects the University, and it ensures that our chapters and members are not held personally liable.

- Send all contracts with vendors (such as a restaurant, hotel, or transportation company) to bnccontracts@brandeis.edu or to BNC National by mail for review and signed approval. Be sure to highlight the deadline for returning the signed contract.
- Contracts should bear either the full name of the organization or its abbreviation: either Brandeis National Committee or BNC. Approximations such as “Brandeis” or “Brandeis Group” are not to be used.
- Contracts will be signed and returned to you within three weeks.

Transportation contracts

Before approving a transportation contract, the National Center needs the following two items:

- a current copy of the transportation company’s certificate of liability insurance
- a copy of the **Transportation Agreement** completed, signed, and dated by the transportation company (see page 39).

Many members participate in multiple BNC trips throughout the year. It is suggested that each person sign an **Assumption of Risk and Agreement** (page 38) that covers all of the trips in one fiscal year. You can print this form along with your registration forms and ask that the participants complete both when they register for the trips.

These guidelines are for the benefit of all of us. We appreciate your help and invite you to call with any questions.

The Chapter Financial Goal

Financial goals are set by National based on chapter size and other considerations. Chapters meet their fiscal year financial goals in two ways: the **financial activities** of the Chapter and the **donations** that are sent in directly to the University.

- a) The **financial activities** of the Chapter are measured by the money collected (revenues) and deposited into the Chapter's bank account, minus the expenses of putting on events and programs or administrative costs such as supplies, postage, printing, and meetings.

This is the factor that can be controlled by the Chapters. They can put on more events to raise money; they can increase the price of attending events and programs, or they can lower the costs of holding the events. All of these increase profitability and increase the net fundraising amounts attributed toward the chapter goal.

- b) When a member makes a **donation** directly to the University, they inform us to which fund they want the gift designated, and your Chapter gets credit for the member's gift.

Chapters can increase contributions to their financial goal by putting on profitable events, sending solicitation letters asking members to contribute to a specific designation such as the Scholarship Fund, the Library Fund, or the current BNC campaign. You can also increase contributions by making a gift to honor a member who has stepped down as president or gone above and beyond the call of duty.

Is the financial goal of a Chapter impacted when money is sent to Brandeis from the Chapter's bank account?

No. The money sent to Brandeis has already been taken into account when the treasurers send in their monthly financial reports. For example, if a chapter sends in surplus funds, this does not affect their financial goal.

Chapters should be aware that they may have made their financial goal in March, for example, but then their expenses in April and May exceeded their revenues in those months. This could result in not meeting your financial goal.

How do the funds sent to Brandeis benefit the University? Why is it so important to regularly send in money to Brandeis?

The money that you send allows Brandeis faculty to continue research, provides students with scholarship support, or purchases books and journals for the library. When the BNC was founded, we took on the responsibility of helping to build the Brandeis Library and we pledged to help with its maintenance. We have never given up on our promise to the library, which depends on support from our members for its operations and growth.

Special Events Financial Report

The Special Events Financial Report is to be sent to National within 30 days after your chapter event. Please use the BNC form for your reporting.

Donor names: It is important to send National the names and addresses of donors who write a check or give a donation, because there may be members with the same first and last name in a chapter. We want to ensure that we give the right person credit for their tax-deductible gift. We also want to thank them for their support.

Depositing Checks

Send all donor checks of \$75 or over directly to National. **The Chapter should not send a tax receipt.** This will ensure that the University complies with IRS guidelines by providing a tax receipt to donors. It will also help us thank the donor and maintain a record of their giving history.

Third-party checks: Send all third-party checks to National. The University must send a tax receipt to all outside sources that make a gift to Brandeis, for example, from a shopping event in which the participating vendors give the chapter a portion of the proceeds.

Gifts from the Chapter

If your chapter wants to thank a speaker with a donation, you may not use money from your treasury for this gift. We know that many chapters like to celebrate, honor someone, or thank a speaker with a donation. Your chapter should collect a “sunshine fund” or take a collection for these types of gifts. Money that is collected from the chapter from events, activities, or study groups may not be used for this purpose because it has already been allocated for a specific area to support Brandeis University.

Tax Deduction for Fundraising Events

Fundraising events and programs help build community among members, raise awareness of the organization, and attract new donors to support important causes at Brandeis.

Brandeis University is a 501(c)(3) non-profit organization and we must comply with IRS rules and regulations. Here are some helpful guidelines for your event and program planning.

Tax-Deductible Portion of a Fundraising Event or Program

It is important to include in your publicity materials the amount of the cost to participants that is tax deductible. You must get approval of that amount from BNC National before you distribute your publicity materials.

The tax-deductible portion of a fundraising event or program is the amount over the fair market value of any benefits the donor is entitled to by paying for an event. The gift is only the amount of the payment that exceeds the value of the benefits the donor is entitled to, whether or not the donor actually attends or otherwise receives the benefit.

The IRS defines fair market value as the value of the goods and services offered to an event participant. For example, if you have a fundraising luncheon, you would determine the costs of the hotel, food, entertainment, parking, etc. and divide this by the number of guests expected. This figure is the fair market value if the donor were to purchase these services. It is the responsibility of the organization putting on the event to determine the fair market value and to inform the participants of the amount of the contributed portion.

For example: A lunch event may have a fair market value of \$55 per person. Tickets are \$100 each. The tax-deductible charitable contribution portion is \$45.

If an event has more than one ticket price (for example, a member price and a non-member price) then the non-deductible benefit is the same for all attendees.

Whether items are purchased at full price, at a discount, or if they are underwritten, the fair market value is the same.

NOTE: The cost of putting on the event and what you are charging for the event are different. You need to charge a higher amount than the cost per person in order to make a profit and make a contribution to the area you wish to support at Brandeis.

It is important that you include the non-deductible portion of the attendance cost on the invitation and in all publicity so that Brandeis and BNC are in compliance with the IRS guidelines, and to provide donors with the information they need to substantiate the value of their charitable deduction in the event of an audit by the IRS.

Please use the following wording in all your written materials for fundraising events or programs:

Any amount over \$XX is a charitable contribution to Brandeis National Committee's [Scholarship Fund, Engineering the Future, Library Fund, etc.].

Providing Receipt

All receipts for donations of \$75 or more are provided by Brandeis University. When goods and services are provided in return for a donation, the taxpayer is required by the time their tax return is due to have a receipt that states which portion of a payment is tax deductible, and if necessary provide it to the IRS to substantiate their deduction.

Insurance and Liability

Please have members sign the Acknowledgement of Risk and Waiver of Liability form on page 35. Keep signed forms on file for the year.

Chapter Liability and Insurance

If a member/non-member is injured during an official BNC event in a member's home, is the host covered by Brandeis insurance?

If the host is sued, the homeowner's policy would respond as the primary coverage. If Brandeis/BNC is named as codefendant, the University's general liability insurance would respond for Brandeis and the BNC.

If a member/non-member leaves their car in a parking lot while on a BNC day trip to another location, is the member/non-member covered by Brandeis insurance?

No, the University does not provide insurance in this case. The member's/non-member's personal auto insurance would apply.

If someone is injured during an official BNC event in a member's community clubhouse and sues the member, is injured party covered by Brandeis insurance?

If the homeowner/member is sued, the homeowner's policy would respond as the primary coverage. If Brandeis/BNC is named as codefendant, then the University's general liability insurance would respond for Brandeis and the BNC.

What is the liability if a member/non-member is injured during an official BNC day trip?

If there is a contract for transportation services in the name of Brandeis University, then Brandeis University/BNC insurance will apply.

Personal Liability

Are members of BNC's National, Region and/or Chapter Boards insured by the University when they are acting in their roles as a Board Member or as an Officer of the Chapter?

The University's coverage includes volunteers only while performing duties related to the conduct of their official capacity. Specific incidences are reviewed for insurability on a case by case basis.

Are Chapter/Region Treasurers bonded?

Following the University's practices, Chapter/Region Treasurers are not bonded.

Trips with an Overnight Stay

Please consult with National before planning a trip with an overnight stay.

A tour operator or travel agent should be used for BNC trips to minimize the University's and the BNC's risk. All exceptions must have the prior approval of the National Center.

- The agreement must be forwarded to the National Center for an authorized signature. No one within a chapter or region is authorized to sign a Contract.
- The process must be repeated for each trip even when the same providers are used.

Secure a Certificate of Insurance from the travel agent.

- The travel agent must provide the University with a Certificate of Insurance evidencing a general liability policy covering its acts and omissions in connection with the tour.
- The insurance certificate must name both the University and the BNC as additional insureds, with a 30-day written notice of cancellation provision.
- The insurance certificate must show coverage in effect during the time of the tour.

Promotion

- All announcements for the trip must prominently include the Brandeis University **Travel Responsibility Statement (page 36)**.

Payments

- *Checks for travel services should be made payable to the travel agent, not to BNC.* If participants make additional tax-deductible donations to Brandeis University, these may be made payable to BNC. Donations made by participants in connection with tours may not be treated as deductible charitable contributions unless they are voluntary. This means that a participant does not have to make a contribution in order to go on the trip.

In promotional materials, you should use the following example:

Join us in supporting the Brandeis University Libraries, a vital resource for the University's outstanding students and faculty.

Enclosed is my tax deductible gift of

\$250___ \$100___ Other___

Please make these checks payable directly to Brandeis National Committee.

Conditions of Participation and Release of Liability Form

All participants in overnight trips **MUST** sign and return, well before the tour commences, the Conditions of Participation and Release of Liability form on page 37. Send your signed forms along with a list of tour participants to the National Center prior to the date of departure.

Sales Tax

Sales tax exemption may not be used with respect to any goods and services purchased in connection with the tour. This means that you pay sales tax on meals, hotel rooms, and any extras associated with the trip. Please email bnc@brandeis.edu with any questions.

Before promoting your trip, please email the following documents to bnc@brandeis.edu for review:

- Copy of group agreement with tour provider
- Insurance policy of tour provider (additional information may be requested in the course of the review)
- Certificate of Liability Insurance (with Brandeis University and the Brandeis National Committee named as additional insured)
- Copy of the proposed ***Travel Responsibility Statement (page 36)***
- Copy of the proposed ***Conditions of Participation and Release of Liability Statement (page 37)***

Prior to departure

- Submit to the national center a complete list of tour participants along with a signed copy of the ***Conditions of Participation and Release of Liability Statement (page 37)*** for each participant.

Postal Regulations

Chapters may use the Brandeis nonprofit mailing rate to mail bulletins or promote chapter fundraising activities. They may not use the nonprofit mailing rate to send any materials that promote overnight trips and travel, credit or debit cards, or insurance of any kind. For questions relating to a specific nonprofit mailing, please contact Financial Associate Aby Ogoke abyogoke@brandeis.edu.

Acknowledgement of Risk and Release Agreement for Physical Activities

I understand that I will be undergoing physical exertion while participating in a (PHYSICAL ACTIVITY, e.g., biking) _____ trip to and from (LOCATION) _____ on (DATE) _____. I am aware of the risks of injury involved with this activity. I certify that my level of physical fitness is sufficient for this activity. I fully and completely assume any risks solely to myself, and accept full responsibility for my individual physical fitness to participate in this activity.

In consideration of being presented this opportunity to participate in a biking trip with the Brandeis National Committee's _____ Chapter and in acknowledging that I am aware of and willing to assume the risks associated with biking, including round-trip transportation, I hereby voluntarily agree to waive, hold harmless and indemnify the individual organizers of this trip and Brandeis University and its trustees, agents, volunteers and employees from any and all claims, demands, damages and causes of action of any nature whatsoever arising out of ordinary negligence which I, my heirs, my assigns or successors may have against them for, on account of, or by reason of my voluntary participation in the above mentioned activity. I understand the content of this document, and I execute this general release, waiver of claim and assumption of risk agreement of my own free will and accord.

Date: _____

Signature: _____

Name: _____

Form revised August 2019

Travel Responsibility Statement

The *[tour operator]* is the sole tour operator of this tour. Brandeis University and Brandeis National Committee (BNC) are not responsible for the acts, errors or omissions of the tour operator, *[name of tour operator]* _____, airlines, hotels, restaurants, bus carriers, cruise lines or any other person or entity engaged in carrying out tour arrangements (e.g. change in flight times, hotel arrangements, itinerary or fare changes, accidents, injury, damage or loss) or for any other event or cause beyond the control of Brandeis University or the BNC (e.g. sickness, weather, strike, civil unrest, acts of terrorism, quarantine, acts of God); or for any losses or additional expenses occasioned thereby. The right is reserved to decline to accept or to terminate participation (without refund) of any person on the tour should such person's health, actions or general deportment impede the operation of the tour or the rights or welfare of other participants.

By my signature below, I indicate my voluntary consent to participate in the

_____ Chapter bus trips on _____ (dates) .

I hereby acknowledge and understand that neither Brandeis University nor the Brandeis National Committee (BNC) or the above named chapter assumes responsibility for my welfare, or for any injuries, claims, or losses arising from my participation in this event or travel to and from the event. I further acknowledge that I am aware of the risks to me of injury, property damage, or loss entailed in my participation in this program.

On behalf of myself, and my executors, heirs, administrators or assigns, I hereby release and forever discharge Brandeis University, its Trustees, officers, employees, agents, or volunteers, and the BNC, its employees, agents and volunteers, from any and all claims or causes of action arising from my participation in this event.

I have read and understand this document and am signing it of my own free will in order to participate in the program.

Name _____ Date _____

Signature

Conditions of Participation and Release of Liability

Tour _____

Dates of tour _____ Chapter _____

1. I agree that I am participating in this tour at my own risk. I understand that Brandeis University and Brandeis National Committee ("BNC") are not the tour operator or supplier of any service associated with this tour.
2. I understand that the tour operator, [name of tour operator] and the suppliers who supply transportation, sightseeing, and restaurant and hotel accommodations are independent contractors and are not agents of Brandeis University or BNC.
3. I understand that all vouchers, receipts, and tickets are issued subject to the terms and conditions of the tour operator and the suppliers and shall be a contract solely between me and that person or entity. I understand that Brandeis University and BNC are not responsible for terms and conditions of the tour or the fulfillments of the obligations of the tour operator or suppliers.
4. By utilizing the services of the tour operator and suppliers, I hereby release Brandeis University, BNC, their Trustees, offices, agents and employees from any and all liability, regardless of the cause thereof, for any loss, damage (including personal injury, property damage, or consequential damage), expense, cost, inconvenience or delay, that I may suffer as a result of or in connection with my participation in this tour, including, without being limited to, any liability resulting from or arising out of any acts, errors, omissions, defects or default of Brandeis University and/or BNC. I understand that Brandeis University and BNC are not liable for payment of any refund, unused travel reservation, or other costs of any kind.
5. I understand that it is strongly recommended that I purchase trip cancellation insurance, luggage loss or damage insurance, and/or accident insurance for myself, as insurance coverage is not provided by Brandeis University or BNC.
6. I have considered and understand the risks of participating in this tour, and hereby accept for myself my assigns, executors and heirs any and all such risks as may occur.

I hereby acknowledge that I have read, understand and agree to the terms and conditions of this release and I further understand that these terms and conditions are contractual and not a mere recital. I affirm that I have signed this contract as my own free act.

Name _____ Date _____

Signature

Assumption of Risk and Release Agreement for Day Trips by Bus

By my signature below, I indicate my voluntary consent to participate in the

_____ Chapter bus trips from (date) _____ to
_____ (date).

I hereby acknowledge and understand that neither Brandeis University nor the Brandeis National Committee (BNC) and the above named chapter assumes responsibility for my welfare, or for any injuries, claims, or losses arising from my participation in this event or travel to and from the event. I further acknowledge that I am aware of the risks to me of injury, property damage, or loss entailed in my participation in this program. On behalf of myself, and my executors, heirs, administrators or assigns, I hereby release and forever discharge Brandeis University, its Trustees, officers, employees, agents, or volunteers, and the BNC, its employees, agents and volunteers, from any and all claims or causes of action arising from my participation in this event.

I have read and understand this document and am signing it of my own free will in order to participate in the program.

Name _____ Date _____

Signature

Transportation Agreement

1. _____ (a.k.a. the Company) agrees to provide a driver who is duly licensed, trained and authorized to drive the assigned vehicle, and whom the Company represents has the qualifications and expertise to perform the duties required under this Agreement. The Company represents that it has undertaken due diligence and care in hiring and training such driver (including, without limitation, criminal background checks). The Company represents and warrants that such driver shall abide by all laws, regulations and reasonable behavioral rules including but not limited to those regarding consumption of alcohol, narcotics, or any other substance which could impair the ability to safely operate a motor vehicle.
2. Vehicle Condition and Service: The Company agrees to provide Brandeis with a vehicle that is clean and in good mechanical working order, and agrees to maintain the vehicle in good mechanical working order throughout the term of the contract.
3. Insurance: The Company agrees and represents that it has and will maintain in full force and effect a policy or policies for motor vehicle insurance (including bodily injury and property damage liability coverage) in form and substance satisfactory to Brandeis, under which the Company and Brandeis are named as insured, and which shall contain such coverages and minimum limits of liability as are customary in the industry but which in no event shall be below one million dollars (\$1,000,000) per person per occurrence. The Company also agrees and represents that it has and will maintain a policy or policies for general liability insurance, in form and substance satisfactory to Brandeis, which includes broad-based coverage to cover, without limitation, the indemnification requirements set forth in paragraph 4, below. A duplicate original or copies of such insurance policies shall be delivered to Brandeis prior to execution of this Agreement.
4. Indemnification: The Company agrees to indemnify, defend and hold harmless Brandeis, its Trustees, officers, agents, employees and contractors, from any liability, cost or expense in connection with or growing out of any claims whatsoever for any acts or omissions, whether intentional or negligent, of the Company or its agents, servants or employees (including, without limitation, its driver(s) and mechanic(s)) for injury, death, loss or damage to any person or to the property of any person which occurs or is in any way associated with the services provided in connection with this Agreement, except as a direct result of the acts, omissions or negligence of Brandeis or its employees, agents, or other representatives. This indemnity and hold harmless agreement shall include indemnity against all costs, expenses, judgments, arbitrations, settlements, penalties, and liabilities (including without limitation attorney's fees) incurred by or in connection with any claim or proceedings brought thereon and the defense thereof.

Company-authorized Signatory

Organization's Signatory

Date

Date