

DIVISION FUNDRAISING GUIDELINES

Divisions may choose to solicit contributions from companies to support division activities. DMG policies and procedures, AACC's Commercial Support Policy for Educational Programs, and ACCME guidelines for commercial support apply to all fundraising activities.

POLICIES AND PROCEDURES THAT APPLY

DMG Policies and Procedures

The following guidelines are from Section H, Finances, Corporate Funding of the DMG Policy and Procedure manual.

- All proposed solicitation of corporate funding must be included in the division annual budget.
- Divisions may solicit corporate funding for projects up to their budgeted amount not to exceed \$5,000 from a given company for a given activity.
- Divisions must obtain AACC Treasurer approval to solicit contributions greater than \$5000 from a given company for a given activity.
- Divisions must notify the AACC Treasurer if a company voluntarily contributes more than \$5000 for a given activity.
- Divisions may recognize corporate funding of specific activities on their home page.
- Divisions must report all contributions to the AACC Treasurer. Checks from donors must be made payable to AACC in care of the division and must be sent directly to the AACC office.
- The Omnibus Budget Reconciliation Act of 1993 mandates that 501c (3) organizations, such as AACC, must provide written confirmation of charitable contributions of \$250 or more. A donor's canceled check will no longer be sufficient proof of the contribution. The \$250 threshold applies to each separate contribution, not to the yearly total.
- In addition, 501c (3) organizations must issue written acknowledgements for contributions of \$75 or more for which the donor gets something in return. The acknowledgement must state the dollar value of what the donor received in return for the gift.
- The DMG staff liaison will acknowledge all donations and contributions on behalf of the division.

AACC Commercial Support Policy for Educational Programs

The following excerpts are from the policy.

- AACC's educational programs must be developed in conformity with the ACCME guidelines for commercial support.
- AACC educational programs must be under the control of AACC and not be subject to the control of commercial interests of supporting companies.
- AACC will specifically control the following:
 - Identification of educational needs and objectives
 - Selection and presentation of content
 - Selection of program developers, managers, and presenters
 - Selection of educational methods, and

Evaluation of the activity

ACCME Commercial Support Standards for Continuing Medical Education

The following excerpts are from the ACCME commercial support standards. AACC is the provider in the following cases.

- The provider must make all decisions regarding the disposition and disbursement of commercial support.
- The terms, conditions, and purposes of the commercial support must be documented in a written, signed agreement between the commercial supporter and the provider and its educational partner(s).
- The provider, the joint sponsor, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

STRUCTURING THE FUNDRAISING EFFORT

Budgeting for Commercial Support

The planning committee should develop a realistic budget for the event and identify the amount of commercial support needed.

Identifying Target Companies for Support

The Planning Committee should identify potential supporters and develop a chart listing contact information for each. This can be updated as needed and should be monitored to prevent duplicate solicitations. The chart can be used to track commitments, date of invoicing, payments, and thank you letters.

Funding Levels

In some cases it may be helpful to designate more than one level of funding and specify the benefits that accompany support at each level. The following are examples of benefits that can be provided:

- Complimentary registration for one or more representatives of the company to attend the event.
- Option to include company literature in designated display area.
- Inclusion in all promotional literature, web site listings, and event materials.
- Ability to be designated the sole supporter of selected food and beverage activities, such as refreshment breaks, lunches, dinners, or receptions.
- Recognition during the event.
- Provision of a roster of attendees in electronic format following the event with permission for a one time use by the company. (Note, no email addresses will be provided.)

Making Contact

It is generally desirable to make a personal contact with each company first and follow up with a written invitation for support. In both the personal contact and written invitation the focus should be on explaining what the benefits are to the company and providing the information needed for them to make a decision.

Specify the Event

Give name of event with date, location, and sponsoring organization.

Some Benefits

- Ability to interact with leaders of the profession in this specialty. Give information on who will be attending the event.
- Ability to build recognition within the profession of company's commitment to this specialty. Acknowledge the company's interest in the field.
- Ability to promote company and products. Provide options such as personal contacts, display of promotional literature, access to registrant mailing list.
- Ability to earn points towards floor placement in the AACC Annual Meeting Laboratory Exposition.

Decision Making Requirements

- Level of support needed
- When payment is needed
- How payment should be made

Follow Up

Once a verbal or written commitment for support is made, a request should go to the Division staff liaison at AACC to invoice the company for the contribution and provide information needed by the company to process payment. Companies may request the AACC tax identification number, documentation of non-profit status, or completion of specific contribution forms. Payment should be requested to arrive at least one month prior to the event.

The Division should follow up with the company to obtain the following:

- Commercial agreement form for CE/CME purposes
- Obtain electronic copy of logo, web site address, and correct spelling of company name for use in promotional materials.
- Obtain name of representatives to receive complimentary registration if that is among the benefits.

The AACC staff liaison should

- Monitor receipt of payments and advise the division treasurer when contributions are received.
- Coordinate processing of complimentary registrations

After the Event

Following the event, a thank you letter and electronic copy of the roster (if that is among the benefits) should be sent to each company providing support.