**Development A/PPS No. 03.02 (1.1)**

**Issue No. 2
Effective Date: 06/04/2021
Next Review Date: 11/01/2024 (E3Y)**

**Sr. Reviewer: Director, Athletics**

**POLICY STATEMENT**

*Texas State University is committed to fostering relationships with donors to ensure funds are raised to benefit student-athletes.*

**01. BACKGROUND INFORMATION**

01.01 Bobcat Club is the principal fundraising arm of the Texas State University Athletics Department. Bobcat Club provides a way for supports to help talented Texas State student-athletes receive a top-tier education while pursuing their goals both on and off the field of competition. While the primary focus is providing scholarship support for student-athletes, Bobcat Club is also focused on raising money for facilities upgrades and high impact projects that directly benefit student-athletes.

Bobcat Club is an organization of alumni, fans, former student-athletes, coaches, and friends joining to provide current student-athletes with a first-class education and a chance to excel both in the classroom and on the playing field. With the rising cost of school tuition, private contributions and support from members is critical to ensure the ongoing success of our student-athletes.

**02. TYPES OF GIVING**

02.01 Annual Giving

Bobcat Club supports the academic and athletic endeavors of Texas State student-athletes. Annual fund donors make a direct impact on the scholarship costs of the Athletics Department. Philanthropic gifts to Bobcat Club directly support the scholarship costs associated with running a Division I athletics program.

Scholarship costs have risen dramatically in recent years, and, as the cost to educate student-athletes continues to rise, so too does the need for support from Bobcat Club members.

02.02 Restricted Sport Fundraising

Bobcat Club does not solicit philanthropic support for restricted sport accounts. Coaches are encouraged to form their own clubs to solicit funds for their programs as an added enhancement for the needs for their programs and to provide the best experience for student-athletes. A restricted gift will not count toward Bobcat Club benefits.

02.03 Capital Campaign

The Athletics Department will work concurrently with the Division of University Advancement on future capital campaigns regarding endowments, facility enhancements, scholarship support, major gift fundraising, events, and any pre-campaign strategic planning to enhance the overall mission of the university and the Athletics Department.

02.04 Major Gifts

A gift of $25,000, or larger, to Texas State is considered a major gift. Gifts of this size may be an up-front donation or may be paid out over a five-year pledge period. Gifts of this size may be used for facility enhancements, endowments, annual giving, bequests, etc.

Memorandums of Understanding (MOU) will be written in coordination with the Office of Donor Relations and with the help of the associate director of Endowment Services. Once the terms have been agreed upon with the donor, a fully executed agreement will be signed by the vice president for Advancement, the director of Athletics, the provost and vice president for Academic Affairs, the university president, and the donor.

02.05 Planned Gifts – “Legacy of Excellence”

Planned giving is a thoughtful strategy that may allow donors to make the gift of their choice while benefiting their personal finances. A planned gift to Bobcat Club is a commitment to future generations of Bobcats. It promises that donor’s passion for Bobcat Club is impactful, remembered, and revered beyond their lifetime. This is possible through advantageous tax laws that provide powerful incentives to support public and private charities. As with any leading university, a vibrant planned giving program is an integral part of its strong future. Through planned giving, it is possible to reduce or eliminate federal and state taxes owed on the value of a gift. Planned giving can work in a donor’s favor when it comes to paying taxes on income, capital gains, gifts, inheritances, and a donor’s estate. These tax benefits are available to individuals at all income levels.

The Athletics Department and the Division of University Advancement understand state and federal tax laws and can guide donors in planning charitable gifts. They can help in all aspects of gift planning, including suggesting options for appreciated securities and property, potentially increasing donor’s income in the process while leaving more for their heirs. Through the various avenues of planned giving, the Athletics Department has established the Legacy of Excellence, a society of Texas State alumni, former letter winners, parents, and friends of the Athletics Department who are dedicated to the continued success of Texas State's student-athletes and coaches while increasing the university's national visibility and spirit.

It is the goal of the Legacy of Excellence to ensure that the Athletics Department continues to provide student-athletes with the tools to compete academically and athletically at the highest level.

02.06 Endowments

An endowment is a transfer of money or property donated to Texas State, usually with the stipulation that it be invested, and the principal remain intact. This provides an annual, spendable income that becomes a permanent resource in future years for future student-athletes. Endowments start at $25,000 and can be designed to meet the criteria of the donor’s intent by including specific language in the MOU.

Endowments help grow the Athletics Department as it continues to succeed in the Sun Belt Conference and build on the success of athletic programs.

02.07 Student Bobcat Club

Student Bobcat Club membership starts at $25 per academic year. The Student Bobcat Club is managed and operated by an assistant director of Development within the Bobcat Club Office. The Student Bobcat Club is a comprehensive way for undergraduate students to begin their philanthropic giving to Texas State at an early stage and become lifelong Bobcat donors.

02.08 Gift-in-Kind Program

a. Purpose

The purpose of the Gift-in-Kind program is to create mutually beneficial trade partnerships between the Athletics Department and local businesses. Local businesses trade goods and services – in exchange for Texas State Athletics tickets, donor benefits, and marketing opportunities – to directly benefit and support current and future student-athletes.

b. Request Process

The Gift-in-Kind request form is available to Athletic Department staff using the ARMS compliance software. Once the request form is submitted, the assistant director of Development will receive email notification of request. Requests will be reviewed and Gift-in-Kind will be administered based upon information given. Requested amounts and awarded amounts may differ based on availability and information provided.The assistant director of Development will email the requestor once the form has been processed, Gift-in-Kind is administered, and Gift-in-Kind forms are in the requestor’s mailbox.

Requestors will be given two Gift-in-Kind forms, one white and one pink. When visiting the Gift-in-Kind business awarded, requestors will get the white form signed by a representative of the business and must provide the business with the pink form. The white form must be returned to the assistant director of Development’s mailbox. Future Gift-in-Kind will not be administered until the white form is signed and returned to the assistant director of Development’s mailbox.

To ensure Gift-in-Kind benefits will be awarded, requests must be submitted at least one weekbefore the requested date of service. This is especially important for Gift-in-Kind hotel requests. Gift-in-Kind requests may be denied for any reason if requested within the one-week period of the requested date of service, excluding official visits.

All Gift-in-Kind requests must be requested through and approved by the Bobcat Club. Individuals may not enter one of the Gift-in-Kind partners’ place of business and request Gift-in-Kind benefits. Business partners are fully aware these requests must come from the assistant director of Development, and in-person requests will be denied without prior approval and a Gift-in-Kind form.

All Gift-in-Kind requests are dependent upon funds and room availability.

**03. CLUB SEATING AND SUITE LEVEL**

03.01 All club seat and suite sales are solicited, renewed, and processed through the Development Office in the Athletics Department. This includes the club and suite waiting list, agreements, signage on the seats and suites, and program recognition.

The terms of the contracts are typically three years, and all the football suites and seats have Bobcat Club Parking included in the agreements. Suite holders will receive four parking passes and 16 tickets to each game, while the club seat holders receive one parking pass per four seats.

**04. NCAA RULES EDUCATION**

04.01 Texas State development will work with the compliance office to ensure donors understand the complicated issues of NCAA compliance and educate them on the rules for current student-athletes and potential student athletes. Once a year, a compliance brochure will be sent to the donor base to make them aware of the rules and regulations.

**05. REVIEWERS OF THIS PPS**

05.01 Reviewer of this PPS includes the following:

Position Date

Director, Athletics November 1 E3Y

**06. CERTIFICATION STATEMENT**

This PPS has been approved by the following individuals in their official capacities and represents Texas State Athletics policy and procedure from the date of this document until superseded.

Director, Athletics; senior reviewer of this PPS

President