



## **IU EAST CAMPUS FUNDRAISING GUIDELINES**

### **I. INTRODUCTION**

All members of the IU East community (faculty, administrators, support staff, and students) have a role and responsibility within the framework of their positions to participate in the effort to build financial support for the work of our campus. To this end, these members of the campus community are encouraged to interact with their alumni and constituents and to build mutually-beneficial relationships with potential donors. When appropriate, faculty members, deans, administrators and students may be called on to further assist in identifying University needs, describing these needs, preparing proposals to potential private funding sources, meeting with potential funders and, generally, striving to obtain resources for the University's identified unmet needs. It is important, however, that relationships with potential donors and the wider community be carefully coordinated and managed for the best outcomes. Therefore, the IU East Office of Gift Development has produced these guidelines to ensure that any fundraising efforts are part of a cohesive and comprehensive strategy for building long-term support for IU East.

### **II. THE ROLE AND PURPOSE OF THE DEVELOPMENT OFFICE**

- 1. The purpose of the IU East Office of Gift Development, is to plan, coordinate and implement comprehensive fundraising strategies to build support for Indiana University East among individuals, corporations, foundations, and the community.**

At the direction of the Vice Chancellor of External Affairs, the Development team strives to create and maintain mutually beneficial relationships with friends and donors by discovering and facilitating their philanthropic desires, engaging them in the work of the University in a meaningful way, and recognizing them for their contributions.

- 2. The Office of Gift Development accomplishes this work in partnership with the Indiana University Foundation.**
  - The IU Foundation is the umbrella organization under which private charitable contributions may be made to a public educational institution.
  - Their role is to support fundraising staff and functions throughout the Indiana University system and to protect the economic well-being of the University by ensuring compliance with applicable state and federal laws and regulations.

- It is vitally important that IU East cooperates consistently with the Foundation to ensure that donors receive the full and proper benefit of making their gift, and that the University is a good steward of those gifts.

### **III. WORKING WITH THE OFFICE OF GIFT DEVELOPMENT**

#### **1. In order to achieve the best outcomes and optimal fundraising success, it is imperative that any faculty, department, school or unit coordinate all fundraising efforts with the Office of Gift Development *prior* to engaging in any form of solicitation in the name of IU East.**

- Any fundraising projects, including events, sponsorships, auctions, or appeals must comply with IU East, IU and IU Foundation policies and with all relevant state and federal law.
- Any proposed communication regarding any fundraising activity, including letter appeals, or event invitations, whether issued by mail or electronically, must be submitted to the Office of Gift Development a **minimum of four (4) months in advance** of the proposed event in order to be approved by the IU Foundation.
- Failure to obtain IU Foundation approval of fundraising activity jeopardizes the charitable status of any gifts received – and the resulting tax benefit to donors – and may impact or restrict the use of the resulting funds.
- The production of digital or printed communications should be organized through the Communications and Marketing Office. You can submit your request via their ticket system at <http://www.iue.edu/marketing/request/request.php>. Lead times vary depending upon volume and urgency of current projects.
- Deans, faculty, and other campus leaders are encouraged to build relationships with their own alumni and supporters. It is essential, however, to engage the Office of Gift Development before discussing, presenting, or soliciting a constituent for any specific project, program, or initiative.

#### **2. At any given time, there are many projects at IU East worthy of financial assistance; the Office of Development must prioritize its work strategically in order to be most effective.**

- The Chancellor, along with the Vice Chancellor of External Affairs, in consultation with academic and administrative leaders, will determine funding priorities. These priorities will inform the priorities of the Office of Gift Development and its ability to support department- or faculty-led events or projects.
- Once an event or project is approved by the Indiana University Foundation (see above), the Office of Gift Development must be consulted on the following: solicitation of gifts and/or sponsorships, solicitation of gifts-in-kind (e.g. for an auction), post-event gift processing (see below), and gift acknowledgement.
- Once an event or project is approved by the Indiana University Foundation (see above), the Office of Gift Development may be able to provide support in the following areas at the discretion of the Vice Chancellor of External Affairs: requesting and supplying mailing lists, advising on event admission and programming, preparing proposals, researching individual donors, or direct communication with donors.

**3. Students and Student Organizations are a vital part of developing support for our campus and many other worthy causes, and should therefore collaborate with the Office of Gift Development to maximize fundraising success.**

- When students or a student organization endeavors to raise funds benefitting any campus program or facility, a representative of the organization or the organization's advisor must contact the Office of Development a minimum of four weeks prior to the proposed fundraising activity to inform them of plans and seek any necessary guidance on the collection and administration of funds. The representative or advisor should complete and submit the Student Fundraising Activity Registration Form.
- Likewise, when students or a student club/group endeavors to raise funds benefitting a cause outside campus, a representative of the club/group or the advisor should contact the Office of Campus Life four weeks prior to the proposed activity and complete and submit the Student Fundraising Activity Registration Form, attached to this policy. The form requires approval by Director of Campus Life. If approved by Campus Life, the Campus Life Director then presents the form to the Office of Gift Development at least three weeks prior to the event for final approval.

**4. As the link between IU East and the IU Foundation, all charitable gifts or proceeds to be deposited into an account held by the Foundation must be submitted to the Office of Gift Development for proper processing and submittal. The IU East Development Office is the responsible entity for forwarding appropriate charitable gift information to the IU Foundation.**

- In order to maintain security, funds should be delivered in person to the Development Office (RW103) between 8:00 am and 5:00 pm Monday through Friday.
- Do not submit cash for deposit. Cash may be exchanged for a check made payable to the IU Foundation at the Bursar's office. Please note the relevant project or event in the memo of the check.
- If you need assistance with your Foundation account number, contact the Development Office at (765) 973-8419.