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# SOUTHEASTERN

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## L O U I S I A N A U N I V E R S I T Y

### **Coordination of Fundraising Activities with University Advancement**

#### 1. Purpose

The purpose of this policy is to clarify and define the rules and guidelines under which private gift dollars are solicited and accounted for by programs, schools, departments, agencies, foundations, or any other entities affiliated with, or a part of, Southeastern Louisiana University. This policy also aims to assist in the maximization of fundraising potential and to ensure that:

- a. All university fundraising is consistent and of a consistently high standard.
- b. Duplication of approaches and submissions is eliminated.
- c. Donors and sponsors are properly recorded and acknowledged.
- d. A high level of coordination exists between all University and University-affiliated units to ensure that the University appears and operates like one united institution.
- e. All campaigns and appeals receive the support and endorsement of the University.

#### 2. Scope

Members of the University community are expected to understand and follow the rules and guidelines contained in this document to ensure a strong Southeastern Louisiana University advancement program consistent with the University's interests. The guidelines set forth in this policy apply to the activities of any dean, director, chairperson, faculty or staff member, or student group, who undertakes any fundraising or solicitation of contributions in the name of the University from alumni, businesses, organizations, associations, foundations, parents or friends of the University, or who seeks to establish a fundraising program.

#### 3. Policies

- a. The Office for University Advancement is the University's internal consultant on all matters relating to fundraising. It provides advice and support as necessary on issues such as proposal writing, prospect research, sponsorship ideas and coordination of fundraising activities.
- b. The Office for University Advancement is the coordinating unit for fundraising activities while individual organizations (colleges, programs, athletics, etc.) implement the actual fundraising appeal.

- c. All fundraising activities shall conform to established University rules and policies, including the Foundation Gift Acceptance Policy and Procedures and shall fit within the University vision and mission.
- d. The initiation of fundraising efforts starts with a Fundraising Proposal Form completed and approved by the program/department head and dean/administrative head in charge.
- e. The Office for University Advancement will review proposals and gather additional information as needed.
- f. The Vice President for University Advancement will make a final determination based on University priorities.
- g. Any plans to solicit financial support or in-kind gifts for student programs or to conduct fundraising activities for student organizations must first receive approval from the Vice President of Student Affairs. This applies to solicitations for alumni\*, parents, friends, foundations, businesses, corporations, organizations, and associations and includes raffles, the sale of products and services, and similar fundraising activities. Plans approved at this level must then be submitted to the Office for University Advancement, as stipulated above.
- h. Proposals to federal, state and/or local governmental funding agencies that require "matching" support from private contributors, must be coordinated with the Office for University Advancement.
- i. Any literature, including brochures, booklets, and letters used to attract private funds to Southeastern shall be coordinated through the Office for University Advancement so that the most accurate information appropriate to a particular fundraising effort is reflected and to maintain a standard of quality on all solicitation materials.
- j. Stewardship of donors and acknowledgement is primarily the responsibility of the Office for University Advancement. All gifts shall be processed and acknowledged in writing in a timely and appropriate manner. All gifts from alumni, businesses, organizations, associations, foundations, parents or friends shall be sent to University Advancement to be processed and recorded in the gift records system.
- k. Southeastern Louisiana University acknowledges that a policy of this nature may not anticipate every possible issue that may arise with respect to fundraising activities. As a result, the University reserves the right to modify this policy at any time.

\*Many organizations, particularly fraternities and sororities, conduct alumni fundraising projects using names and addresses received from their organizations' national offices. Obviously, Southeastern Louisiana University has no role in these projects; however, please do inform the Office of University Advancement of plans to use such lists and of dates contact will be made.

#### 4. Procedures

- a. Obtain and complete a Fundraising Proposal Form (available online). The form states the objective of the fundraising effort, method proposed, monetary goal, and a list of prospects to be contacted. Any previous fundraising history should be noted on the form as well.
- b. Once approved by the appropriate program/department head and dean/administrative head, the completed proposal form is forwarded to the Office for University Advancement for review.
- c. The Office for University Advancement will review the request and depending on the nature of the request, either approve the activity, not approve the activity, or require changes before approval.
- d. Written notification indicating the status of the request is issued by University Advancement. Approved projects will be instructed to move forward.
- e. Copies of all proposed solicitation letters, or any other solicitations which may appear in brochures or newsletters, etc., must be approved in advance by the Office for University Advancement.
- f. Help and assistance from the Office for University Advancement is available as needed.