

EDINBORO UNIVERSITY OF PENNSYLVANIA

Policy: Fundraising Policy – Soliciting Charitable Gifts

Policy No. E006

Recommended for Approval by: Marilyn Goellner
Marilyn Goellner, Vice President for University Advancement

Approved by: Dr. Guiyou Huang on 5/21/2020
Dr. Guiyou Huang, President Date

Review Date: As Required

INTENT

Edinboro University (“University”) recognizes that its future success will depend upon its ability to develop a variety of funding sources including gifts and grants from private donors such as alumni, parents, other individuals, corporations and foundations. University advancement shall be the primary division charged with soliciting charitable gifts on behalf of the university. The purpose of this policy is to outline the way in which the University will pursue private gift income and how University employees and volunteers may participate in that process. Gifts in support of the University may not be solicited or processed through any other office, group, chapter, or affiliated organization, except in accordance with this Policy (with the exception of student organizations, who must follow the Edinboro University Student Fundraising Policy No. A053).

This policy is designed to provide guidance to the University community and general public to facilitate the charitable gift giving process and to provide donors with the greatest flexibility possible in formulating their gifts within governing policy and legal parameters while assuring that gifts support programs and projects consistent with the mission of the University.

The University adheres to the standards of the Council for the Advancement and Support of Education (CASE-www.case.org) in conducting fundraising programs and reporting fundraising results.

POLICY

University Advancement is responsible for all aspects of individual and private corporate and foundation donor identification and assignment, donor records, cultivation, solicitation and stewardship.

It is the University’s responsibility to establish all fundraising priorities. Fundraising priorities and goals are established and approved by the President. While the University is in an active comprehensive campaign, only a limited number of non-campaign fundraising projects can be undertaken.

PROCEDURES

The University Advancement Division shall be charged with conducting annual appeals (including direct mail/Phonathon), personal and major gift solicitations, and fund-raising events in support of

University priorities, athletics, colleges, departments, schools, and programs. During annual fundraising campaigns, capital, or comprehensive campaigns, all development efforts will be coordinated in support of the University's goals and priorities.

Departments and programs within the University may, with the approval of the appropriate dean, executive director, or vice president, conduct fund raising with oversight and support (as available) from the University Advancement Division. The Vice President for University Advancement will review requests to ensure they do not interfere or conflict with annual and major gift fund raising, events, or other cultivation and stewardship activities planned by the division.

All gifts from various constituents in support of the University should be forwarded to the advancement office for appropriate gift processing and acknowledgment. All gifts will be processed in accordance with the donor's wishes.

Definitions

A gift is a voluntary transfer of money, property (e.g., equipment, art), or other assets made with philanthropic intent and without expectation or receipt of direct economic benefit or any other tangible compensation. The University operates under a donor-centric model of fundraising within the parameters of giving outlined by the Internal Revenue Service and other applicable legislative and regulatory agencies. A donor may, within these parameters, restrict his or her gift to specific activity or a specific program area or purpose (e.g., fund a scholarship, endowment of a professorship, construct a building).

Grants

Under the direction of the Director of Grants and Sponsored Programs, that office is responsible for sponsored research grants, pre-award grant management, post-award accounting (in collaboration with the grants accountant), and ensuring that the terms and all internal and grant management requirements are fulfilled. Based on the Council for the Advancement and Support of Education (CASE) definitions, two categories of charitable grants are considered philanthropic in nature and thus countable in annual giving or campaign reports:

1. Nonspecific grant – a grant received that did not result from a specific grant proposal and does not commit specific resources or services or require reports to the donor on the use of the funds.
2. Specific grant – a grant received from a grant proposal that is not in response to a specific request for proposals (RFP) issued by the grantor. The University may commit resources or services as a condition of the grant, and the grantor may request an accounting of the use of the funds and of results of the programs or projects undertaken.

Individual Lists and Requests for Information

As an integral part of the advancement division's responsibility to fundraise for the University, it has ownership and administration of alumni and donor records. The advancement division is responsible for maintaining data used to facilitate ongoing contact and communications between the University and its alumni. It is responsible for maintaining donor contact, biographical and giving data, as well as maintaining the overall database to serve as a comprehensive tool for stewardship of existing donors and development of future donors.

The University Advancement Division's alumni donor database is the sole source of data to be used by all University units for directing newsletters, invitations, solicitations, or other structured communication with alumni and non-alumni supporters. Units are prohibited from maintaining any database to support these types of communications.

The purpose of this requirement is to properly secure personal data and to centralize all contact information to assure greater accuracy, avoid duplicate messaging, and enhance the currency and dimension of the database. The University Advancement Division will collaborate with the University regarding all alumni e-communications.

Requests for lists, addresses, emails, and mailing labels must be made in writing via a help desk University Advancement Division data service request. List requests from on-campus student organizations and alumni groups will be approved on a case-by-case basis.

As a result of the University Advancement Division's responsibility to maintain updated and accurate lists of alumni, non-alumni individuals, corporations, and foundations, no University employee shall maintain lists of alumni or other individuals or organizations for purposes of resource development or communication separate from those maintained by the University Advancement Division. In addition, University employees are encouraged to provide the University Advancement Division with information about their interactions with alumni, individuals, and organizations that occur in their capacity as a University employee as it could lead to future fundraising opportunities and success.

Joint Fundraising

Under an executed Memorandum of Understanding (MOU) and in accordance with applicable statutes and Board of Governors' policies and procedures/standards, the University can engage with an affiliated entity in joint fundraising activities to benefit the affiliated entity and for the benefit of the University. All such fundraising activities shall be done jointly through the efforts and resources of the University, university employees, and the affiliated entity.

RELATED POLICIES

Edinboro University *Gift Acceptance Policy No. E002*

Edinboro University *Naming of Facilities and Programs Policy No. E003*

Edinboro University *Student Fund Raising Policy No. A053*

CONTACT INFORMATION

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