

Heidelberg University Fundraising Policy

For Student Groups, Academic Departments, Administrative Units, Programs, Student Organizations, or other University-Affiliated Groups

What should I know about fundraising at Heidelberg?

- Heidelberg University depends upon the ongoing, increasing and generous financial support it receives each year from alumni, friends, parents, local businesses corporations, foundations, and other donors. The Office of University Advancement and Marketing (UAM) coordinates all of the fundraising appeals to any University constituents: alumni, board of Trustees, students, parents, faculty, staff, friends, local businesses, corporations, and foundations.
- The Office of University Advancement and Marketing (UAM) also is responsible for fundraising for The Heidelberg Fund, which is the revenue needed to meet the University's educational and general expenses every year. The Heidelberg Fund supports every aspect of academic and student life at Heidelberg.
- We need to make sure that all fundraising efforts complement and not compete with the University's efforts to secure financial support. Students, faculty, staff, or University-affiliated organizations all play an important role in these relationships with our donors. We need you to work with us to maximize the results for all of us at Heidelberg.

My group would like to raise funds. How do we get started?

On-Campus Fundraisers

- If your fundraising project involves something very simple, like tabling outside of Hoernemann for a bake sale, or selling bracelets, trinkets, t-shirts, ticketed performances, or personal chore services, (e.g. leaf raking, car washes), this is known as "*inside*" *fundraising*, i.e. to only the Heidelberg community of students, faculty and staff.
- Multiple campus fundraisers being held on the same day, may result in less money being collected by each organization. Therefore, a fundraising calendar is maintained of all approved fundraising **events**. In general, no more than **two** fundraisers will be approved for a specific day.
- Campus fundraisers **may not occur on Reading Day**, which is the day prior to the first final exam period each semester.
- You should know that because of Internal Revenue Service (IRS) regulations, the University cannot issue gift receipts for these transactions.
- Groups often ask if they can solicit people to give to a cause and then enter donors into a raffle for a prize. This is not allowed; you may only do a drawing for a prize if there are no conditions to enter the prize drawing in the first place. Check with the UAM Office before planning such a drawing. See below for more information related to raffles.

Off-Campus Fundraisers

- If your group wishes to do something more, such as solicit local businesses for in-kind donations, or if you wish to solicit alumni for a project or experience, this is considered

"outside" fundraising. You will need to complete the Fundraising Planning Form. An electronic copy is available on Inside.heidelberg.edu website. Send the completed form to Kelly Lavelle, Director of The Heidelberg Fund, in University Hall, Suite 207. Call her at ext. 2386 or email her at klavelle@heidelberg.edu, if you have questions.

- Please note that if your project involves sending any forms of communication, we **MUST** have a copy of that publication and it must be reviewed by UAM before it is sent.
- We ask for at least **two to three weeks notice** before your project is scheduled to happen. In some cases, more time might be required, especially if it involves sending communications to alumni or other Heidelberg constituents. Following the submission of your form, you will be contacted to come in and discuss your project. Please make sure your form is filled out correctly and completely. *Please note: We will not approve your request, if there is a conflict with a previously scheduled University solicitation.*
- If you are a member of the faculty or staff, the UAM Office will consult with your immediate supervisor prior to meeting with you or your group.
- Following your discussion with the Vice President for University Advancement and Marketing or a designated UAM staff member, your proposal will be considered for approval. The Office of UAM may make recommendations regarding its timing, method of solicitation or other aspects of the proposal.
- If the request is denied, UAM will provide an explanation for why the request was not approved. Every effort will be made to respond promptly to inquiries, recognizing that there are times when UAM may need to obtain approval from other campus representatives.

Are there any times of the year when groups are not allowed to solicit outside organizations or individuals?

- There are some periods when fundraising will not be approved. No fundraising appeals from departments, organizations, teams, clubs, fraternities or societies may occur during **December** (end of the tax/calendar year) and **May and June** (end of the University's fiscal year). These are the times when the University is fundraising among constituents in support of The Heidelberg Fund and other University priorities. Such a period is typical across most colleges and universities.

Other things you need to know:

- Heidelberg University prohibits the use of University trademarks and University-provided or University-originated contact lists (mailing lists, phone lists, email lists, directories, and the like) for the solicitation of funds to benefit specific individuals as individuals do not have designated 501(c) 3 non-profit status. Fundraising efforts, however, to recognize an individual associated with the University where the resulting funds are used to benefit the University (e.g. classroom to honor a retiring faculty member or a book fund to memorialize a deceased staff member or student) are permitted. All such fundraising efforts fall under this policy and should be coordinated through the Office of UAM.
- Students and student-run organizations are not permitted to conduct raffles or reverse

raffles on their own without a faculty or staff member because of accountability and liability issues related to the University's status as a nonprofit 501-c3 organization. If a raffle is held, the staff member, administrator or faculty member must keep accurate records that contain the following:

- When the raffle was held.
 - Who organized the raffle and what was the purpose.
 - How many tickets were sold.
 - How much money was grossed.
 - Who were the recipients of the proceeds/prizes, etc.
 - The dollar amounts of the aforementioned prizes/payouts, etc.
 - How much money net of all expenses/payouts was received by Heidelberg.
 - Further information is available from the Office of UAM.
- In spite of the popularity of “crowdsourcing” websites such as gofundme.com, crowdrise and indiegogo.com, the Office of UAM does not permit students, faculty or staff to fundraise on these third party donation based sites for any Heidelberg projects, events or programs. This does not mean we condone or encourage students to conduct these for individual efforts.
 - In spite of the popularity use of Venmo, Venmo is prohibited for any use of transactions associated with Heidelberg University fundraising efforts. This includes, but not limited to, student organizations fundraising for their own groups and/or outside philanthropy projects.

Note: If you are considering a fundraiser not covered in this document or have questions related to this policy please see Kelly Lavelle, Director of The Heidelberg Fund, in the Office of University Advancement and Marketing, Suite 207, or contact her at klavelle@heidelberg.edu or 419.448.2386 for further information or clarification.