Student Fundraising Project Approval Policy

Policy Objectives
1. To ensure that all fundraising projects are in alignment with the priorities and mission of the institution.
2. To maintain an orderly approach to private funding sources, i.e., prospects.
3. To determine whether the requesting organization’s goal is feasible, and if not, to help set a feasible goal.
4. To ensure donor reply pieces contain requisite information so that donor acknowledgement and receipting processes occur quickly and accurately.

Who Must Apply for Project Approval?
The project approval policy applies whenever a student group seeks to raise private support in the name of the University of Rochester from any entity, e.g., individuals, foundations and corporations, for any project. A project is defined as one that has not been an on-going fundraising program and involves the solicitation of multiple donors. Examples of new fundraising projects requiring approval include programming/speaker funds, student prizes, conference attendance, endowed professorships, building campaigns, honoring funds, department-based annual funds, and scholarship funds. (Solicitation of individual donors must also be coordinated through the Advancement Office.)

Exemptions
Certain fundraising projects are exempt from the fundraising approval requirement:
1) Fundraising projects for which the total fundraising goal is less than $1,000*;
2) Class campaign gifts (which are already administered through University Annual Funds);
3) Student Fundraising events, which do not involve alumni, parents or community friends.

* Although organization does not have to complete an approval form for small projects, all fundraising projects should be coordinated through University Advancement to ensure compliance with policies, procedures, and IRS tax laws.

Process
The student(s) responsible for the fundraising project should complete the Fundraising Project Approval form and obtain approval signatures from the group’s advisor. If the student(s) initiating the project needs assistance in completing the form, please contact a Senior Director in Arts, Sciences & Engineering Advancement.

The appropriate Advancement staff will review requests for approval or revision in consultation with the Dean of the College. Approval means that Advancement believes the project goal is feasible and is consistent with the priorities and mission of the institution.

If an organization does not submit a fundraising project request or does not receive approval but proceeds with fundraising, then the funds raised will remain in a holding account until the issue is resolved.

Return Form to:
Jason Amore, Associate Vice President for Advancement
PO Box 270100
**Summary**

**Primary Organization Sponsor Contact:**

Name

Project Title

Group requesting the project

Proposed Project Dates: Begin ___________________ End ___________________

Phone

e-mail

**Overview**

Describe the campaign or project, including its purpose, fundraising methods, goals, and how it will further the objectives and educational mission of the University of Rochester. (attach additional page if necessary)

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**Fundraising Goals**

Total Fundraising Goal $__________________

Total Currently in Hand $__________________

Goal for Endowment/Project $__________________

Goal for Expendable Funds $__________________

**Project Budget**

Estimated Fundraising Costs (materials, postage)—Office of Advancement can assist with planning estimates $__________________

Source of Funds to Cover Fundraising Costs ____________________________________________

**Prospective Donors**

Donor populations to be approached ____________________________________________

Updated 7/12/16
Potential donors:
(Specific Individuals, Corporations, Foundations)

Amount to be solicited from each:

$  
$  
$  
$  
$  
$  
$  
$  
$  

**Endorsement and Signatures**

Primary Organization Project Contact (print)  Signature/Date

Organization’s Advisor (print)  Signature/Date

**Approval**

Associate Vice President for Advancement  Date
Jason Amore

__ Approved
__ Approved with conditions
__ Unapproved (feedback attached)

Dean of the College  Date
Richard Feldman