SAINT LEO UNIVERSITY POLICY

SECTION: Division of University Advancement

SUBJECT: Solicitation Policy

Issued by: Board of Trustees

Replaces: Policy of March 15, 2000

Objective

The purpose of the solicitation policy is to ensure that the Saint Leo University community:

. lives by the core values of Respect and Responsible Stewardship in regard to solicitation activity;
. conducts solicitations for all contributions in consistent, excellent manner;
. properly recognizes all contributors;
. properly administers private dollars and gifts in kind;
. does not over-solicit current and prospective contributors (internal and external); and,
. adheres to all standards and regulations in regard to philanthropic and marketing support.

Definition

Solicitations include but are not limited to the following activities that seek contributions of funding or specific items through:

. personal visits, telephone, mail and e-mail communication
. sponsorships, underwriting, memberships
. events (including dinners, golf tournaments, etc.)
. raffles and sales (including car washes, tee shirts, etc.)

Review of proposed activities

Activities to solicit monetary support or gift items from students, faculty, staff, alumni, friends, businesses, corporations, foundations, or other groups must be approved by the Division of University Advancement prior to solicitation.

In consultation with appropriate individuals, the vice president of University Advancement will review each solicitation proposal that is to summarize: the amount to be raised, fund-raising costs, listing of individuals and/or groups to be solicited, solicitation materials, timeline, and the benefits (including benefit costs) to be received by the donor. Approval decisions will be based on factors to include timing of solicitation, audience, thoroughness of plan, program budget, etc.

Deposit and receipt of revenue

The University’s policy is to process all gifts within 48 hours of receipt. Proceeds of activities are to be deposited and acknowledged as follows:

a. Philanthropic Contributions
   All private gifts (including gifts-in-kind and marketing support) are to be processed through the Division of University Advancement. Proceeds of event tickets that include a philanthropic gift as a portion of the admission cost are processed through University Advancement.

b. Raffles, Sales, Events (with no philanthropic contribution)
   Proceeds from raffles, sales, and revenues from events that do not include a gift as part of ticket price are not philanthropic contributions as defined by the IRS and are to be processed through Trane Stop.

Resources accessed in Datamart

. Gift Acceptance and Stewardship Policies Statement
. Gift Transmittal form
. Solicitation Proposal

Scope of policy

All Saint Leo University organizations and programs are to adhere to this policy. University recognized student organizations are to work through the director of Student Involvement who will coordinate with the Vice President of University Advancement.
Solicitation (Fundraising) Guidelines for Student Organizations

Adopted 8-31-05

In accordance with the Solicitation Policy, all recognized student organizations must adhere to the following guidelines in achieving fundraising goals:

1. Recognized student organizations may sponsor fundraising projects only with the advance approval of the Assistant Director of Campus Life for Student Involvement.
2. Fund raising projects are limited to recognized student organizations.
3. Approval maybe granted upon review of submitted Student Organizations’ Fundraising Proposal Form.
4. All fundraising proposal forms must be submitted to the Assistant Director of Campus Life for Student Involvement, located in the Student Activities Building, at least two weeks prior to the event to be considered.
5. Door-to-door solicitation is not permitted anywhere on campus. This includes offices, residence halls, and classrooms.
6. Any off-campus solicitation must be approved by the Office of University Advancement.
7. All fundraising efforts, sales, and marketing approaches must be passive in nature. Recognized student organizations are not allowed to directly solicit or in anyway pressure individuals to contribute to their fundraising effort.
8. Any single financial gifts totaling more than $25.00 must be reported to the Director of Advancement Services. IRS receipts will need to be issued to donors documenting the gift amount.
9. Please report any solicitors in violation of the Solicitation (Fundraising) Guidelines to the Assistant Director of Campus Life for Student Involvement immediately.

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For additional information, please contact:
Stan Kaszuba
Assistant Director for Student Involvement
Student Activities Building
352-588-8856 stanley.kaszuba@saintleo.edu
Student Organizations’ Fundraising Proposal Form
(Must be submitted 2 weeks prior to event)

Name: __________________________ Telephone: __________________________
E-mail: __________________________ Organization: __________________________
Advisor’s Name: __________________________ Date: __________________________

PURPOSE-
This proposal is to raise money and/or in kind items for what specific organization/project?
________________________________________________________________________

How will the proceeds of the effort be used?
________________________________________________________________________

How many people will benefit?
________________________________________________________________________

BUDGET & GOAL-
What is the project’s total cost? What is the total amount and/or the items to be raised through this effort?
________________________________________________________________________

What are other sources of revenue for this project (budget allocation, participant fees, etc.)?
________________________________________________________________________

PROGRAM-
Give a detailed program description explaining what your organization will be doing to raise funds (for example: Event (dinner, golf tournament, etc.), Direct Solicitation (letter, personal asks, phone-a-thon, etc.), Sales (tee shirts, raffle, auction, car wash, etc.), Marketing or Sponsorship (proposal and agreement). Include program title and specifics.
________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

PROJECT COST-
To determine expenses vs. revenue, what are the anticipated costs of this fund raising effort? (Please include all project costs that may include brochures, postage, golf fees, food costs, facility rental fees, recognition signage, recognition gifts, etc.)
________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Does the contributor receive anything in return for his/her support?

AUDIENCE-
Where will the fundraising occur? If on campus, give specific locations. Who is going to be asked to participate?

Will anyone off-campus be asked to participate? If so, be specific.

MARKETING-
How will this effort be advertised? How will the audience be asked to participate?

SCHEDULE-
When will the fundraising begin and end? What is the project timeline from start to completion?(Include Dates & Times)

STEWARDSHIP-
Who handles the thank you notes, deposits revenue, oversees how gifts are expended, completes final budget and project report?

SETUP-
Will you need any tables and/or chairs for your solicitation efforts? Please specify time, dates, and location. *(Please note this does not substitute a work order, you will still need to have a work order entered for tables/chairs needed)*

<table>
<thead>
<tr>
<th>Signature</th>
<th>Date</th>
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<tbody>
<tr>
<td>Advisor’s Signature</td>
<td>Date</td>
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Office Use Only

- Date submitted: 
- Event Date: 
- Approval: 
- Approval Date: 

*Please submit to Stan Kaszuba, Assistant Director of Student Involvement, Student Activities Building, 352-588-8856, stanley.kaszuba@saintleo.edu*