

Title/Subject: **FUNDRAISING ON BEHALF OF CENTRAL MICHIGAN UNIVERSITY**

Applies to: faculty staff students student employees visitors contractors

Effective Date of This Revision: May 1, 2017

Contact for More Information: CMU Advancement Office

Board Policy Administrative Policy Procedure Guideline

BACKGROUND:

The Advancement Office is the philanthropic fundraising unit of Central Michigan University (CMU). Advancement is the sole office responsible for all charitable requests for private support from individuals, corporations, foundations, etc.

PURPOSE:

CMU seeks to ensure that charitable fundraising and charitable private grant-making is conducted in a manner consistent with the mission and vision of the institution, while adhering to ethical and legal obligations, as well as internal university policies and procedures related to the use and oversight of philanthropic gifts and grants.

This policy does not apply to non-philanthropic grants, sponsored awards and contracts that fall under the purview of the Office of Research and Graduate Studies at CMU, nor does it apply to registered student organizations that are legally-separate and independent of the university.

This policy is intended to provide clarity to university employees seeking external philanthropic support to the university, detailing the general procedures governing the solicitation, receipt and tracking of external philanthropic requests for all academic and athletic units. It is Advancement's goal to provide the best service both internally and externally resulting in significantly increased contributions.

DEFINITIONS:

Philanthropic Gift and Private Grant: Although the term "gift" and "grant" are often used interchangeably, a philanthropic gift is defined as a contribution received by an institution for either unrestricted or restricted use in the furtherance of the institution for which the institution has made no commitment of resources or services other than, possibly, committing to the use of the gift as the donor specifies. Philanthropic gifts are made by individual donors, whereas charitable private philanthropic grants are made by corporations, foundations or charitable organizations. The solicitation of both falls under the exclusive purview of the Advancement Office at Central Michigan University.

Sponsored Awards and Contracts: Awards and contracts, typically for sponsored research are given for the pursuit and completion of specific program or research objectives, tasks or the delivery of specific products within

Authority: George E. Ross, President

History: None - New Policy

Indexed as: Gifts to the University; Private Gifts; Charitable giving; Donations; Bequests; Solicitation of contributions

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specified timelines. These are the responsibility of and are received through the Office of Research and Graduate Studies.

POLICY:

The Vice President for Advancement is exclusively responsible for all philanthropic gift and charitable private grant solicitations on behalf of CMU, its divisions and departments. Although individual departments, faculty members and staff employees may request and receive approval to make funding requests to charitable organizations (corporations and foundations) on behalf of the university, the Vice President for Advancement is granted sole authority by the President to approve such solicitations.

PROCEDURE:

Cultivation of prospective donors and solicitation of philanthropic grants and gifts shall be approved by the Vice President for Advancement at CMU (or his/her designee). This approval is required due to the necessity of a) protecting the university's tax exempt status and ability to receive tax-deductible gifts and grants, b) avoiding duplication of requests to individuals, corporations and foundations, and c) insuring that the purpose for which the funds are provided are in the best interest of CMU and the donor.

CMU faculty and staff who seek to solicit charitable gifts or grants must first consult with their Dean or Athletic Director to make sure their request is acceptable under unit and university funding priorities. In the event that a faculty or staff member works within or represents a division or unit on campus that has not been assigned a Development Director, those individuals shall contact the Associate Vice President for Advancement to discuss their program or project.

Faculty and staff members are to contact their Development Director to discuss their project. Prior to moving forward they are to receive approval from their Dean. **The Provost makes the final review and recommendation to the President and Vice President for Advancement on academic fundraising priorities. The Athletic Director follows the same guidelines for athletic fundraising priorities.** The assigned Development Director will work with them to identify potential funders, or in the event that funder(s) have already been identified, to develop a funding request specifically tailored to that donor or charitable organization. The Vice President for Advancement is granted, by the President, the final authority on all charitable requests.

This policy applies to all solicitations including individual, corporate and foundation solicitations. Bulk mailings must also be approved and coordinated through the Annual Fund Office to guarantee that we are working in an organized and efficient manner.

The Advancement Office will work with Academic and Athletic units to ensure that their approved proposal or solicitation is appropriately documented and monitored, as required by the university. In the event that a solicitation is funded, the Advancement Office will document the award, process payment, and distribute the funds to an appropriate account for expenditure.

Central Michigan University reserves the right to make exceptions to, modify or eliminate this policy and or its content. This document supersedes all previous policies, procedures or guidelines relative to this subject.