



Baldwin Wallace University

Tax ID# 34-0714629

Fundraising Policy

Approved 7/24/2018

The purpose of this policy is to ensure that faculty, staff, students and volunteers who seek outside funding or other forms of gifts for Baldwin Wallace University (BW) are aligned with the University's strategic plan, fundraising priorities, and abide by all applicable laws, rules, policies and standards of ethical behavior.

The Center for Philanthropy & Alumni Engagement recognizes its role in coordinating University fundraising throughout Baldwin Wallace University and is committed to donor-driven discussions and approaches. A collaborative approach between The Center for Philanthropy and the appropriate school, college, or department is utilized. Our goal is to build authentic, lasting relationships with our donors, honor donor intent, maximize success, avoid duplication of effort and solicitation, and adhere to University priorities.

Definition of Fundraising

Fundraising is the raising of assets and resources from various sources for the support of an organization or a specific project. Fundraising activities include, but are not limited to:

1. Calling, writing to, or meeting with individuals, corporations, businesses, or foundations about their interest in supporting a project or program at Baldwin Wallace University,
2. Preparing and submitting grants or proposals to foundations, corporations, or individuals seeking gifts for projects or causes, and
3. Hosting an event to raise money for the benefit of Baldwin Wallace University, a department, division or student organization of BW.

Requests to Conduct Fundraising Activities

The primary responsibility for leading Baldwin Wallace University in its fundraising efforts belongs to the Vice President for The Center for Philanthropy & Alumni Engagement under the oversight of the President. Any volunteer, volunteer group, faculty, staff, department, student, student organization, or school of the University shall secure the approval of the Vice President for Philanthropy & Alumni Engagement, prior to conducting any fundraising activity that meets the following criteria.

Approval of Fundraising Activities

Prior to any solicitation of gifts or contributions from any individual or organization, a **Fundraising Project Request Form** (Appendix I) must be submitted to the appropriate unit head with final approval by the Vice President of Philanthropy & Alumni Engagement for all fundraising efforts, unless otherwise noted below.

Students: Submit a Fundraising Project Request Form to the Vice President for The Center for Philanthropy & Alumni Engagement if the student or student organization is attempting to raise more than \$2,500 for BW or an outside organization or if any solicitation of an individual, company, business or foundation is greater than \$1,000.

Faculty, staff, volunteers and volunteer groups (excluding Board of Trustees): Submit a Fundraising Project Request Form to your dean or department head for initial approval, who will then forward the form to the Vice President for The Center for Philanthropy & Alumni Engagement for final approval.

Faculty or staff who are soliciting a foundation or corporation for an academic program or research grant should submit a Fundraising Project Request Form to the Provost. When a non-government entity is to be solicited, the Provost will consult with the Vice President for The Center for Philanthropy & Alumni Engagement to assure a coordination of fundraising efforts. A copy of any non-governmental proposal must be submitted to The Center for Philanthropy & Alumni Engagement as part of our permanent records.

Acceptance of Gifts

The Center for Philanthropy & Alumni Engagement is the central repository for the receipt, recording, and acknowledgement of all gifts to Baldwin Wallace University irrespective of designation or purpose. The Center for Philanthropy must immediately be notified upon receipt by any individual, department, student organization, or athletic team of any contributions of cash, checks, securities, tangible personal property, or any other form of voluntary support that is covered by this policy. Departments and student organizations often receive gifts-in-kind (i.e. gift cards, auction items, food donations). For any gifts-in-kind valued at \$250 or more, the donor must receive a receipt for tax purposes according to IRS rules (Publication 526). BW's Center for Philanthropy processes all gifts to assure adherence to IRS rules and regulations, the University's gift acceptance policy, and accurate fundraising reporting. All tax-deductible receipts to donors for gifts made to Baldwin Wallace University must be administered solely by The Center for Philanthropy.

Any individual or group, including volunteers, students, faculty and staff facilitating fundraising efforts on behalf of an organization or entity other than the University, is required to clearly identify for donors that their gift is for said organization or entity, not a gift to Baldwin Wallace University.