

Fundraising Procedures |

William Jessup University

Purpose

The Development office encourages WJU staff members to inspire generosity for the university to support our students and mission. This process is made to assist you in the campaign efforts in marketing, solicitations, proper fund management and donor acknowledgement/relationship. We are interested in inspiring generosity and guarding against donor apathy. By following these processes we are serving the university and its constituents.

Step 1: Fundraising Campaign |

- A. Review the fundraising process on my.jessup.edu
- B. Complete the fundraising form on my.jessup.edu (Items included in the Fundraising Form)
 - A. Name of Campaign
 - B. Coordinator's Name & Contact info
 - C. How will the funds be used?
 - D. What department?
 - E. Method of Solicitation*
 - F. Upload Print Material
 - G. Upload list of target groups and individuals (Alphabetical list via excel format)

Note: After the fundraising form is complete, please give the development office one week to review and schedule a meeting with David Pineschi, Director of Donor Development. Any campaign efforts should have at least 3 months of lead time to generate a successful campaign.

* Crowdfund Projects utilizing rise.jessup.edu must follow the listed steps and approval by David Pineschi and the related department supervisors

- A. Athletics - Michael Harper
- B. Academics - Dr. Dennis Jameson
- C. Student Development - Kay Llovio

Step 2: Publications |

There are various ways you can publicize a campaign. These materials may include fundraising letters (sponsorships, individual gifts or gifts in kind), Flyers, Response Cards and/or event(s).

Publication Material

All materials should include (Flyers should also be submitted to Marketing):

- Who, What, Where, When, & How
- WJU Logo
- Contact person and associated info
- Explanation of donor involvement (Type of Gifts, How to give and volunteer needs)

Letters

A sample form is available on my.jessup.edu to be used as a guide. Anything printed on letterhead should follow WJU style guide (speak with Development) with appropriate forms and layout. Forms should be submitted and approved by development in the follow-up meeting.

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Flyers

All materials should include (Flyers should also be submitted to Marketing):

- Who, What, Where, When, & How
- WJU Logo

Response Cards

Each donation request should be accompanied with a Response Card to the prospective donor. See sample form on my.jessup.edu

Response Cards should include:

- Donor Contact Info
- Amount of Gift
- Designation of Gift
- Payable to WJU
- A “check box” to opt out of receiving WJU communications

Events

For donors to receive a tax credit for gifts to WJU, the donor cannot receive any goods for their gift. For example, if a donor purchases a ticket to a dinner event for \$100, and the dinner is valued at \$30, then the tax deductible amount is \$70. Please be sure to disclose what is or isn't tax deductible.

Step 3: Management of Donations |

Gifts to WJU should be accompanied with a response card or given a designation line on the giving section of the website. Development must be invoked in this process.

Checks

- Checks cannot designate a student for tax purposes.
- Checks should be made to WJU accompanied with a response card.
- Checks will not be accepted after 90 days.

Credit Cards (Can be processed one of two ways)

- Online gift using the giving website - To add the campaign to the giving list please coordinate with Development
- Credit Card numbers may be submitted on the response card
- Visa and MasterCard only

Cash

- Cash should be delivered to the business office with the response card
- Cash not accompanied with a response card will be credited to anonymous and the donor will not receive a tax credit.

Donor Acknowledgement

- Each donor will receive a gift receipt letter from development and the related tax credit. This will serve as their receipt
- The campaign coordinator should personally write thank you notes to each content