

Policy 800.1 – Foundation Fundraising

Date Adopted: 8/26/88
Date Revised: 8/28/08
References: BOR 901.9

Issuing Office: University Advancement, Chancellor
Approved By:

I. POLICY

The University of Montana Western Foundation and Development Office for Montana Western are responsible for coordinating all approved fundraising activities conducted for the benefit of the University. The Executive Director of the UMW Foundation, in consultation with the Foundation Board and UMW Chancellor, approves University fundraising activities.

II. PURPOSE

The coordination of fundraising must exist in order to avoid an excess of solicitations by campus units directed to any one potential funding source, to assure the general quality of fundraising efforts, to assure effective timing of those efforts, and to assure that the priorities of the University are being met. The Foundation is in a position to know of efforts that may be in progress with a given donor. This coordinating function prevents duplication by University units and increases the possibility of success in discussions with donor(s). The following guidelines have been adopted to ensure this coordinated approach to fund-raising.

III. PROCEDURES

Fund-raising programs that are to be coordinated by the Foundation include but are not limited to:

1. Annual giving from alumni and others via the Annual Fund Drive and various phone-a-thons.
2. All capital campaigns or building campaigns.
3. Deferred or planned giving programs (estate planning for the benefit of the University).
4. Special projects or gifts (art collections or a corporate five of computers), including all funding projects by departments, programs, or athletics.
5. Special efforts directed to various constituencies (targeted audiences and for special purposes).
6. All foundation grants and gifts to the University should be directed to the Foundation.

The foundation assumes full administrative responsibility for University-wide and basic fundraising efforts. Certain fundraising efforts to targeted constituencies may be conducted jointly by the Foundation and University area.

Any literature that may be prepared to cultivate or solicit private funds by any department or program is to be approved by the Foundation to ensure a consistent quality image to the external community.

The Executive Director of the Foundation has the responsibility for approving all public statements concerning gifts made to the Foundation or University.

In coordination with the Chancellor and Foundation Executive Director, the Foundation will determine the level of funding required to name projects, endow professorships, endow chairs, name scholarships, or other appropriate endeavors.

For joint campaigns and special area campaigns, the Foundation will approve the timing of the proposed campaign.

The Foundation is responsible for official recording and acknowledgment of all gifts made to the Foundation, the University, or any other University agency. Gifts to the University will be handled in accordance with all State policies and procedures, with gift donor information provided to the Foundation for purposes of recording and acknowledgment.

Gifts “in kind” must go through the Foundation for acknowledgment and recording purposes and to ensure that those gifts meet the needs of the University. Cash gifts and gifts in kind should be made to the Foundation. Where feasible, gifts should be directed to the Foundation and checks made payable to the University of Montana Western Foundation.

IV. AUTHORITY

BOR 901.9

V. RESPONSIBILITY

Director of Development, Foundation Executive Director, Chancellor