



Leap Into Fundraising!

Northeastern State University
Office of Development, Alumni Association
& NSU Foundation Inc.

Overview

- ▶ Learn the proper care, cultivation, and harvesting of your department's NSU Foundation accounts.
- ▶ From donor intent to tax receipts, and from IRS rules to allowable expenditures, you will find out how to be a good steward of these funds.
- ▶ Also learn about the difference between sponsorships and advertisements, rules for silent auctions and other fundraisers, and how funds for students must be disbursed.
- ▶ Receive information on PCI Compliance updates effecting donations and the way they are received.
- ▶ But most importantly, learn what the Development Office can do for you as you seek new sources of funding or alumni support for your program.

NSU Foundation	Development Office	Alumni Association
<ul style="list-style-type: none">➤ Separate legal entity from NSU➤ 501c3 public charity➤ Governed by board of volunteer trustees➤ Organized to solely support NSU➤ Incorporated in 1971 with a gift of \$10,000➤ Fiscal year runs on a calendar year	<ul style="list-style-type: none">➤ University office providing staff to support university advancement efforts, including those of the Foundation and Alumni Association➤ Housed at the Branscum Alumni Center➤ Fiscal year runs on July - June year.	<ul style="list-style-type: none">➤ Interdependent entity working in conjunction with NSU➤ Operations supported by private dollars from membership dues, event revenue & corporate partnerships➤ Governed by board of volunteer NSU alumni



- ▶ **As of January 31, 2016, had assets exceeding \$25 million**
- ▶ **Nearly 1,000 fund accounts, supporting scholarships, departments, and projects**
- ▶ **Provided \$734,698 in NSU scholarships in 2015**
- ▶ **Raised over \$3.5 million in private donations in 2015**

Scholarship Monies

- ▶ Scholarship funds are only disbursed into the student's NSU account
 - ▶ We do not write checks to students



Always check with the Development Office before doing any fundraising.

- ▶ Asking for \$100, when we are cultivating for \$100,000
- ▶ Donor fatigue
- ▶ Timing Issues
- ▶ Tracking solicitations to determine efficacy

Types of donations accepted



Types of Donations accepted

- ▶ Money
 - ▶ Cash, check, credit card, payroll deduction, IRA distribution
- ▶ Stock
 - ▶ Appreciated stock can be donated to avoid capital gains tax
- ▶ Real Estate
 - ▶ Must be reviewed and approved the NSU Foundation Board of Trustees
- ▶ Bequests, Trust, Charitable Gift Annuity
- ▶ Life Insurance Policy
 - ▶ If NSU Foundation is a beneficiary, the gift is donated after the policyholder's death
 - ▶ If NSU Foundation is the policy owner, the value of the policy at the time of the donation, as well as future policy premiums can be tax deduction

Credit Card Donations

- ▶ Credit card numbers should never be written down.
- ▶ PCI DSS requirements changed in 2015 instituting strict, finable requirements for credit card payments.
- ▶ Credit cards must be processed through the Foundation for tax-deductions. They cannot be processed through University credit card machines.
- ▶ If mailing return card for donations, credit card lines are no longer to be used.
 - ▶ Provide Foundation phone number (918)458-2143 or (918)444-4200.
- ▶ Custom online donations pages with unique URL's can be created to take donations for your fundraising effort.
- ▶ If your fundraising event requires the ability to take credit card payments on site, we can provide the ability to process Apple Pay, EMV chip cards and traditional magstrip cards.

In-Kind Gifts

- ▶ If less than \$500 value, no documentation from donor required
 - ▶ If IRS questions the value, this is resolved between IRS and the donor
- ▶ If greater than \$500 value, recent appraisal must be provided by donor
 - ▶ Examples: silent auction items, art, books, games, furniture, supplies



Donation Process

- ▶ Donations received from individuals, foundations and corporations
- ▶ Any donor restrictions are noted and honored
 - ▶ Gift acceptance policy limits some gifts
 - ▶ If donor restriction is improper, impossible or beyond the mission of the Foundation the donation will not be accepted
- ▶ Donations are posted in Banner and tax receipt is issued to donor
- ▶ Account totals are available in Banner Financial chart F
 - ▶ In order to access totals, Deans or Department Directors must provide approval to add someone as an account sponsor
- ▶ Donor information sent monthly to deans (or director when appropriate) and University President

What the Foundation does not do

- ▶ We do not raise money for student organizations
- ▶ We do not raise funds for something that does not benefit NSU
- ▶ We do not allow donors to select scholarship recipients

Fundraising

▶ Silent Auctions

- ▶ Consult with NSU Foundation on purpose, audience and process
- ▶ Use NSU Foundation In-Kind Gift Form for single donations
 - ▶ For multiple gifts:
 - ▶ Provide name and address of item donor
 - ▶ Describe item donated and value
 - ▶ After auction closes, keep all bid sheets to determine final bid.
 - ▶ Provide auction item winner and address if amount paid is more than value of item, as the difference is tax deductible.



In-Kind Gift Information

Requestor Information:

Requestor Name _____

Event Requested For _____

Donor Information:

Name _____

Address _____

City, State, Zip _____

Phone # (if available) _____ Date of Gift _____

Description of Gift

Value of Gift _____

FOR FOUNDATION OFFICE USE

Post to _____

Receipt # _____

Donor # _____

Posted By _____



Events



Fundraising Events

- ▶ Keep track of donations for items such as giveaways and prizes
 - ▶ Submit In-Kind gift form for item donor(s)
- ▶ Determine registration fee and process
 - ▶ Try to cover event costs with fees; funds are best raised through sponsorships
- ▶ Create sponsorship packages
 - ▶ Sponsorships can be tax-deductible, less cost of goods or services received by sponsor.
 - ▶ Examples of good or services: green fees, golf cart rental, food, drinks, swag items, etc.
 - ▶ Advertisement is not tax deductible.

Unmask Your Potential Celebrating Nurses and Nursing Education

featuring Miss Colorado, Kelley Johnson

Friday, March 11, 2016



Northeastern State University - Broken Arrow Campus
Pre-event VIP Reception and Silent Auction - 5:30 p.m.
Dinner and Program - 6:30 p.m.
Business Professional attire recommended.

[Click here for sponsorship information.](#)

[Click here to purchase tickets.](#)

[Click here to preview auction items!](#)

Thank you to our sponsors!

Emerald Level



<http://www.parkroyalensemble.com/>

NORTHEASTERN STATE UNIVERSITY

RUN FOR YOUR COLOR 5K

APRIL 14, 2016

RACE TIME 5:30PM | CHECK-IN 1:30-5:15PM

PRE-REGISTRATION

- Sign up online at GoRiverHawksGo.com
- Registration on race day is also available
- If bad weather, race will be postponed and times will be determined and announced.
- First 25 FAN members run free!

T-SHIRT

Participants that register prior to race day will receive a t-shirt (while supplies last). T-shirts will be available for pick-up on race day from 3:30pm up until race time. Pick-up will be at the registration table located in Centennial Plaza in front of the Sequoyah Statue.

COURSE DESCRIPTION

- Take a scenic course through NSU's Tahlequah campus while being splashed with colors along the way. At each K, participants will be splashed with a round of colors.
- Starting line at Sequoyah Statue
- 1 mile fun run

Warning: be prepared to be colored from head to toe as you Run for Your Colors!

COST

- \$20 per person

FOR MORE INFORMATION PLEASE CONTACT
MADISON DOBBS
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Centurion Luncheon 2016

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Centurion Luncheon 2016

[Registration](#) [Attendee List](#)

Join us as we honor our newest Centurions at a special luncheon.

March 4, 2016

11:30 am

NSU Event Center Community Room

1041 N Grand Ave, Tahlequah

\$25 per person

Fundraising Event Websites

Event Website Fields

- ▶ Custom URL
- ▶ Graphics, including sponsors, if desired
- ▶ Can be RSVP only or commerce based
- ▶ Can include multiple activities during one event
- ▶ Seating requests
- ▶ T-shirt Sizes
- ▶ Special meal needs
- ▶ Liability Term and Conditions (often used in 5K's)
- ▶ Custom confirmation email
- ▶ Discount and promotion codes
- ▶ Auction Item Preview

What else can we do for you?

- ▶ Keep track of alumni by activity or major
- ▶ Provide mailing/contact lists of alumni and donors
- ▶ Include fundraising events on social media
- ▶ Send new job packets to former students
- ▶ Include marriages, deaths, babies and other achievements in our twice-yearly alumni magazine, Imprints.
- ▶ Offer free or low-cost gifts for special University guests

Questions?

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