**Sponsored/Affiliated Student Group Fundraising Guidelines**

The College of Engineering depends on private financial support from alumni, parents, friends and industry partners to achieve its goals. Fundraising priorities for the college must work in concert with fundraising conducted by sponsored-affiliated student groups to ensure all contact with our constituents is respectful and positive, and reflects the College of Engineering’s high quality and excellence.

**Section I, Planning for Fundraising**

A. Sponsored/Affiliated Student Groups will develop detailed annual activity and event objectives tied to its mission and priorities, that includes a budget with cost breakdown.

B. Sponsored/Affiliated Student Groups (exec officers) will meet with faculty advisor and college outreach advisor at the end of the school year or in the summer to discuss the following:
   1. Evaluation of prior year events and costs
   2. Activity/event objectives and budget
   3. Comparing current objectives to former objectives to determine if certain activities/events should be dropped, replaced or continued, and are cost effective

C. Sponsored/Affiliated Student Groups (exec officers) will develop a detailed fundraising plan that includes collateral material (solicitation letters, leave behind pieces/brochures/flyers), solicitation activities and lists of donor prospects

D. Sponsored/Affiliated Student Groups (exec officers) will meet with faculty advisor, college outreach advisor and development personnel to discuss the following:
   1. University rules for fundraising, especially with specific donor companies and individuals. Restricted donors on the President’s Reserved List
   2. Review of collateral material/leave-behind pieces and solicitation letters
   3. IRS rules pertaining to what is, and is not, considered a gift (no goods and services)
   4. Timeline for the solicitation

**Section II, Creating Solicitation Materials**

A. Sponsored/Affiliated Student Groups will design and create collateral material, including letters, flyers, brochures, etc., with the help of development personnel to ensure they meet the standards of the college and the university while aligning with their national organizations.

B. Solicitation materials should clearly distinguish between what the Sponsored/Affiliated Student Group’s needs are for travel (conferences, national meetings), recruiting events, enrichment activities and/or outreach activities, including costs associated and a disclaimer about how tax credits apply.
Section III, Fundraising Activities

A. Sponsored/Affiliated Student Groups that solicit financial support from alumni, parents, friends and industry may find the donor prefers to donate to the College of Engineering in the name of the student group versus to the student group directly. The donor would receive a receipt and receive a tax write off from the University of Utah.

B. Affiliated Student Groups who receive donations directly in the name of the student group may need to provide a receipt to the donor for tax purposes.

C. Sponsored/Affiliated Student Groups will set a solicitation schedule and stay within the timeline.
   1. When soliciting companies, there should be no more than a total of three contacts; one initial contact and two follow up contacts if there is no response
   2. When soliciting an individual, there should be no more than a total of two contacts, one initial contact and one follow up contact if there is no response

D. Solicitation levels are not to exceed the following:
   1. $1000 for recruiting events, enrichment or outreach activities.
   2. $1500 for travel to conferences and national meetings

E. Handling of cash and cash equivalents
   1. For cash or checks collected by a member of a Sponsored/Affiliated Student Group that are designated as a gift to the College of Engineering in the name of the student group must be delivered to the college outreach advisor or development personnel within three days of receiving the donation
   2. If donor chooses to mail in a check that is made out to the College of Engineering with the sponsored/Affiliated Student Group Chapter in subject line, it should be mailed to:
      College of Engineering: Development
      72 South Central Campus Drive
      Salt Lake City, UT 84112
   3. Affiliated Student Groups that receive cash or checks from a donor should deposit them into the student group’s outside bank account within three days of receiving the donation

F. Handling of credit card gifts
   1. Donors who choose to make a gift by credit card to College of Engineering in the name of the student group, must call development personnel or provide a phone number where they can be reached so the credit card number can be obtained by phone
2. Donor will receive a receipt for the credit card donation to the College of Engineering in the mail, but an email receipt can be requested through development personnel in the college

Section IV, Accessing College-held Funds

A. Donations to the College of Engineering that are provided by companies or individuals as a result of Sponsored/Affiliated Student Group fundraising will be held by the college but can be accessed by requesting reimbursements or funds through college outreach and development representatives.

B. General donations provided by companies in support of specific Sponsored/Affiliated/Registered Student Groups will be held by the College and distributed through requests made to college outreach and development representatives.

C. Sponsored/Affiliated Student Groups will submit a request form that will be available on the college website. The group must demonstrate the need for funding, include a budget, and should be for leadership, travel, professional development activities or outreach activities only.

1. If request is granted, only approved events and travel are eligible to receive the University of Utah’s tax exemption for goods and services but purchases must be made by college outreach representatives.

D. Student College Council will be made up of the Dean’s designee (Associate Dean, Student Affairs), ASUU Senator, ASUU Assembly representatives, Student Group representatives and/or department representatives. ASUU fund requests will be made to the council.

Section V, Non Sponsored Student Group Finance Management

A. Affiliated/Registered Student Groups will need to establish a bank/credit union account outside the University of Utah.

1. Tax Identification Numbers are required to open a bank/credit union checking or savings account

2. The tax ID can be obtained through a national affiliated organization or through the IRS at www.irs.gov

3. Authorization for signatory authority on bank/credit union checking accounts should include two co-signers – president, treasurer, college outreach advisor and/or faculty advisor – to ensure funds are not misspent or mismanaged

4. When leadership changes annually, all financial information will be turned over to new officers, including tax ID, account number(s) and bank statements
5. Treat tax ID and all account information like personal information; keep it stored in a safe and secure location

6. Any donations received by Affiliated or Registered Student Groups that are held and accessed through an outside bank/credit union account will not be eligible to receive a tax credit from the University of Utah but can through the Student Group’s tax ID number.