Campus Solicitations Policy

Campus departments and groups have a window of opportunity to partner with the Office of University Development to raise needed funds for their students.

From April 1 to July 31 each year, the resources of the development office will be available for solicitations of restricted gifts to benefit departments, groups and teams.

The Office of University Development is here to partner with campus colleagues to help secure funds needed to serve Oswego’s students.

While its efforts for much of the year are focused on raising unrestricted annual gifts that support the college where the need is greatest, it is available to help with special needs and opportunities that present themselves. During the spring months, when the fiscal year for The Fund for Oswego is winding down, the development office’s resources are made available for other campus fundraising activities.

The Office of Alumni Relations and the Office of University Development maintain up-to-date mailing lists for more than 75,000 alumni and friends of the college, and more than 40,000 accurate email addresses. They also maintain a comprehensive calendar of solicitations and email messages targeted to various audiences. Departments sending a solicitation within the window of opportunity can make use of these valuable resources to reach the greatest number of potential donors.

Memorial gifts are handled on a case-by-case basis, since timing is often important when friends and family memorialize a loved one.

Simple forms and procedures are available online at www.oswego.edu/giving/employees and a copy of the Campus Solicitations Policy is attached. Further inquiries can be made by calling 312-3003 or emailing develop@oswego.edu.

While the everyday efforts of the Office of University Development are targeted at providing funding for programs that state support and tuition alone can’t cover, helping campus partners raise money for specific goals is one more service the office provides.

The Office of University Development partners with the various departments and groups to optimize campus resources in an effort to collectively engage our alumni while soliciting and securing unrestricted gifts for The Fund for Oswego.

The following guidelines are intended to ensure the efficient and effective operation of the Office of University Development’s solicitation efforts and to maximize the campus’ potential for receiving philanthropic support.
Solicitation Approval and Process
Any person, department or group wishing to fundraise must complete a Request Form: Solicitation of Philanthropic Gifts. This form is obtained from the Office of University Development and must be approved by the Department Chair, Dean, Provost or Vice President and subsequently approved by the Office of University Development and the Vice President for Development and Alumni Relations.

Mailing/E-mailing Materials
All mailing materials and e-mail text must be reviewed and approved by the Office of University Development before they are printed, mailed or e-mailed. This will ensure:

- The message meets SUNY Oswego standards
- The message is appropriate to general fund raising principles
- Pledge card information is accurate and complete
- The giving website is included to encourage online gifts
- No goods or services can be promised in exchange for a gift
- Return envelope is included with the mailing.

Once the solicitation is approved:
- A meeting will be set up with a representative of the department requesting the solicitation and the Director of Annual Giving to lay out the proposed timeline and to further discuss details.

The University Development Office can provide technical assistance as follows:
- Provide mailing numbers.
- Facilitate sending e-mail solicitations based on mutually agreeable dates.
- When the mailing is prepared the Development office will then forward the mailing list to the campus mail department.
- If the planned mailing is to be personalized, i.e. Dear Mark,….(we need to plan on how to proceed with the mailing list).

Cost of Solicitations
All department solicitations are at the expense of the department, group, and/or their own School or College. Incurred cost may include:

- Printing
- Mail processing
- Postage and business return postage where applicable
- Design
- Stationery
- Telephone
- Supplies
- Travel
- Meals

In the event that the University Development Office is printing the solicitation, the department will be billed for all costs incurred.
Gifts and information received

- All checks must be made out to the Oswego College Foundation, Inc.
- All gifts must be sent to:
  Oswego College Foundation, Inc.
  Office of University Development
  219 Sheldon Hall
  Oswego, NY 13126
- Credit card gifts can be made by donors via our secure web site (www.oswego.edu/givenow). We encourage including this web site in the solicitation letter and the “giving button” in all e-mail solicitations.
- The Oswego College Foundation is charged by the campus with maintaining comprehensive donor contact information and giving history, therefore, all data collected as a result of solicitation mailings is the property of the Oswego College Foundation and must be forwarded to the University Development Office.
- If a gift comes in as a result of the solicitation that is not designated to the soliciting department, the designation can not be changed without the written permission of the donor within the fiscal year of the gift (July 1 – June 30). **We must honor the donor’s intent of the gift.**
- No credit card gifts can be accepted by the soliciting department (even if they have the means to process the gift). Donors wishing to make a credit card gift over the phone or in person must be directed to the Office of University Development (315-312-3003). In the event that a credit card gift is mailed to the soliciting department all credit card and other information pertaining to the gift must immediately be brought to the Office of University Development. The security of the credit card and donor information is of the utmost importance and therefore must be kept in a secured location.

Information to be forwarded to the Office of University Development

- Any biographical, personal, employment information, etc. that is obtained as a result of the solicitation, or follow up correspondences.

Receipts and Thank You Letters

- Monthly donation lists will be sent to department chairs for their information.
- The University Development Office will send out a tax receipt in the form of a thank you letter.
- Personalized thank you letters or notes from the soliciting department are strongly encouraged as a means of stewardship. This is likely to lead to future gifts.
- The Office of University Development must be copied on any thank you notes or letters sent to donors for gifts of $250 or greater.
Request Form: Solicitation of Philanthropic Gifts

Please complete this form as thoroughly as possible. Supplementary information and/or completed grant proposals may be attached.

Name of individual submitting request:

Department: Phone:

E-mail Address:

Proposal / Project Title:

Brief description of the purpose of the solicitation and the project being funded:

The Solicitation Plan:
- Target Population:
  - Will the target population be solicited via mail or e-mail?
  - Signatory of the solicitation letter:
  - Follow up plan post-solicitation:
Solicitation Budget (Ex. Printing, postage, telephone bills, etc.):

Benefits to program or department:

Timeline:

Date Request Form Submitted: __________________________

Proposal Review:

I have reviewed this proposed development initiative and recommend its acceptance.

________________________________________
Department Chair Date

________________________________________
Dean Date

________________________________________
Provost or Vice President Date

Development Review:

I have reviewed this proposed development initiative and recommend its acceptance for the Fiscal Year_______.

________________________________________
Director of Annual Giving Date

________________________________________
Vice President for Development and Alumni Relations Date