Sacred Heart University  
Policy on University Fundraising  

Policy Statement  

The Office of Institutional Advancement of Sacred Heart University (IA):  

The IA office works to promote awareness of and enhance the image of the University; to increase the philanthropic support of University operations; to manage the collection of all gifts for the University; and to manage an effective University master fundraising calendar, alumni/parent program and development database. In this role IA is charged by the President of the University to oversee all cultivation, solicitation, collection, and processing of gifts for all areas of the University.

Policy:  

IA recognizes that certain Departments, Divisions, Colleges, Student Clubs and Organizations currently conduct, and need to continue, their own fundraising efforts in order to meet budgetary goals and stated missions. It also recognizes it is critical to increase these fundraising efforts in the future in order to meet greater future budgetary demands. At the same time, in order to meet legal & auditing requirements, as well as increase fundraising efficiencies and maximize the overall impact of fundraising efforts for the University, all Departments, Divisions, Colleges, Student Clubs and Organizations must coordinate their efforts through a central “clearing center,” the office of IA.

IA will work with these areas and other areas of the University to conduct defined fundraising efforts as a way to expand their educational and public service efforts, provided all activities are approved through IA. The office of IA ensures that proper accounting and receipting of all gifts (cash, property, real estate, securities, or in-kind services) to SHU are properly made; the activities are legal; they are within the guidelines of University policy; and they reflect positively on the institution.

It is the responsibility of IA to coordinate all University fundraising activities; to minimize the overlap of efforts between departments; manage and balance the fundraising priorities of the institution; and reduce any actual or potential conflicts that may arise with respect to dates and types of fundraising events or the cultivation and solicitation of individuals, corporations or foundations.
IA will review and approve all University fundraising activities and will be the clearinghouse for all on-campus and off-campus fundraising, development or cultivation events. It is the responsibility of IA to provide and maintain a centralized fundraising-cultivation database and a master fundraising calendar; establish guidelines for the type and scope of events that are scheduled; and resolve in a timely manner any conflicts that may arise. IA will review, in a timely manner, all requests for fundraising activities and will work with Department Managers, Vice-Presidents, and Deans to resolve any actual or potential conflicts.

It will be the responsibility of IA to:

- Account for each gift received by the University (cash, property, real estate, securities or in-kind services, etc.).
- Properly receipt and thank each donor.
- Maintain records of all donors and gifts.
- Insure that donor’s wishes / designations are met.
- Maintain a centralized fundraising calendar.

It is the responsibility of the Department Managers, Vice-Presidents and Deans to:

- Obtain permission to conduct any and all fundraising activities.
- Insure that IA has accurate information regarding each gift.
- Insure that all events are listed on the master fundraising calendar.
- Provide IA with reports and information on all fundraising efforts.

IA recognizes that certain restrictions may exist—as required by law, contract, or the condition placed upon a gift by a donor—that restrict the identification of the donor, use of mailing lists, or the sharing of giving history information. (i.e. – WSHU as mandated by the Communications Act of 1934, 47 U.S.C 390 et seq; 47 C.F.R. 73.2080; and contracts with the Corporation for Public Broadcasting).