



## Jamestown Community College Policies and Procedures

<b>Policy Title</b>	<b>Fundraising</b>	<b>Policy Number</b>	<b>321</b>
<b>Section</b>	<b>Financial Affairs and Development</b>	<b>Approval Date</b>	<b>4/16/2019</b>
<b>Subsection</b>	<b>Development</b>	<b>Effective Date</b>	<b>4/16/2019</b>
<b>Responsible Office</b>	<b>JCC Foundation</b>	<b>Review Date</b>	<b>1/3/1995, 4/16/2019</b>

### 1.0 Purpose

**1.1** In order to maximize the fundraising potential for the benefit of the College and ensure alignment with its priorities, this policy designates the Jamestown Community College Foundation (hereinafter “Foundation”) as solely responsible for College fundraising and establishes guidelines for fundraising activity that will be coordinated and authorized by the Foundation. This policy establishes the procedures for requesting support for fundraising activities, and governs the acceptance of gifts and outlines relevant procedures. Furthermore, this policy outlines college compliance with applicable laws, policies, and fundraising ethics.

### 2.0 Policy

**2.1** The Jamestown Community College Foundation is the recognized philanthropic arm of the college. The Foundation exists for the sole purpose of supporting the college, the development of fundraising plans and programs, and the cultivation of donor support. The Foundation will coordinate all fundraising activities of the College. The Foundation may, if it so chooses, delegate fundraising responsibility in individual circumstances to a non-Foundation staff member of the College.

#### **2.2 Solicitation of Charitable Gifts:**

No College employee shall solicit for charitable gifts of any kind (e.g., cash, equipment) from any individual, corporation or foundation during JCC events or **without prior approval from the Foundation and his/her responsible cabinet member.**

No College employee or student shall use JCC email distribution lists for the solicitation of charitable gifts from fellow employees, fellow students or external parties.

No member of an advisory board associated with the College shall solicit for charitable gifts from any individual, corporation or foundation during JCC events or without prior approval from the Foundation.

No JCC student shall solicit for charitable gifts from any individual, corporation or foundation **without prior approval from a student activities leader and the Foundation**. Student organization representatives may solicit fellow students for donations for the benefit of a student organization without approval from the Foundation. Internal initiatives that are not seeking funds such as drives for food or clothing from fellow students or faculty/staff do not need prior approval by the Foundation.

### **2.3 Acceptance of Charitable Gifts:**

Only employees of the JCC Foundation shall accept charitable gifts (e.g., cash, equipment) from any individual, corporation or foundation. Exceptions may be made in the case of a student club or other entity who has received authorization from the Foundation in accordance with section 2.2 above. All received funds through these exceptions will be reported to the Foundation upon conclusion of the fundraising activity.

It is the responsibility of the Foundation, in coordination with the College President, to serve as the planning/coordinating and approval agency for all fundraising appeals and solicitations made on behalf of the College. The review of all fundraising requests, whether from faculty, staff, or students will be based on the following principles:

- a. The activity is of benefit to the College.
- b. Permission to raise the funds on campus may be withheld if the proposal is deemed to be insufficiently related to broader college priorities, or if difficult precedents may be established.

Prospective donors of charitable gifts will be directed to Foundation office staff. The Foundation is under no obligation to accept a gift and may determine for any number of reasons, including but not limited to perception of benefit or lack thereof, not to accept a gift. Prospective gifts of real property will be referred to the JCC Foundation. Gifts may be refused or returned.

### **2.4 Gifts In-Kind:**

Charitable gifts in-kind intended for the benefit of a JCC division, academic program, or student organization will be transferred in a timely manner from the Foundation to the College entity.

### **2.5 Faculty Student Association:**

The Faculty Student Association will coordinate all fundraising activities with the Foundation.

### **Responsibilities**

The Executive Director of the JCC Foundation shall ensure that adopted procedures are consistent with applicable federal and state laws and regulations, policies and procedures of SUNY, Foundation, and College. Adopted procedures should seek to align with CASE (Council for Advancement and Support of Education) Reporting Standards and Management Guidelines for Educational Fundraising and Association of Fundraising Professionals (AFP) fundraising ethics to the extent no conflicts exist with law or policy.

## **3.0 Procedures**

### **3.1 Fundraising Support:**

**All requests for fundraising support must be made to the Foundation using an established online form made available on the Foundation's website.**

Based on the information supplied by the requestor, the Foundation will determine whether to a) coordinate the fundraising activity b) disallow the fundraising activity or c) authorize the fundraising activity and delegate the responsibility for the fundraising to a non-Foundation staff member.

Considerations for the Foundation include but are not limited to:

- a. Compliance with federal and state laws, and College and Foundation policies
- b. Alignment of request with established College fundraising priorities
- c. Conflicts with the Foundation philanthropic plans for prospective donors
- d. Staff capacity to meet demands of fundraising activity
- e. The true revenue potential of activity after costs of executing fundraising are incurred
- f. Fund minimums in Foundation policies
- g. Cost estimates for gift acceptance or ongoing management
- h. Ability to spend gift; compliance with donor conditions for restricted gifts
- i. Community/College impact
- j. Fundraising will be guided by a Case for Support prepared by the Foundation, and aligned with the JCC Vision, Mission, and Strategic Directions.

### **3.2 Acceptance of Charitable Gifts In-Kind:**

Before the Foundation may accept gifts in kind, the prospective donor must provide documentation of the estimated value of the gift.

In-kind gifts will be reviewed with special care to ensure that acceptance will not involve financial commitments in excess of budgeted items or commit the College to other obligations disproportionate to the gift. For a gift in-kind intended by a prospective donor to benefit a specific College division, academic program, or student organization, the Foundation must first verify in writing that:

- a. The intended recipient (academic program, division, or student organization) and responsible member of President's Cabinet has a need for the gift and wants to accept it; and
- b. The intended recipient and responsible member of President's Cabinet has ensured that the intended gift would not involve a high level of projected costs of installation or maintenance that is disproportionate to the gift.
- c. The equipment is not obsolete.

When gifts-in-kind are given to the College with intent for the donor to receive a tax deduction, it shall be the responsibility of the donor and a requirement of the IRS that the donor, not the College, obtain independent appraisal of the gift for tax purposes. The College shall not become involved in the appraisal process.

Once the gift has been accepted, the Foundation shall convey the gift details to the Business Office in a timely manner to determine if it meets the criteria to qualify as a capital asset. If it meets the criteria, the gift will be recorded as of the date of receipt and will be controlled in accordance with the guidelines on asset management.

### **3.3 Gift acknowledgement and Receipt:**

Primary responsibility for maintaining complete and accurate records of gifts and donations, including gift acknowledgements, shall rest with the Foundation. Records shall be made available in accordance with JCC policies of confidentiality.

Gifts shall be acknowledged in the following manner:

- a. Gifts ranging from \$1.00 to \$9,999 will be acknowledged with a letter from the Director of Development.
- b. Gifts exceeding \$10,000 will be acknowledged with a letter from the Executive Director of the Foundation and the College President.

Gifts may be considered as a means toward naming a facility, space, and/or program according to the directions stipulated in JCC Policy 222, Naming of Facilities, Spaces, and Programs.

#### **4.0 Definitions**

**4.1 Charitable Gift:** A gift of cash, equipment, real property, stock, etc. intended for the benefit of the college. Not to be confused with personal gifts intended for individual employees or offices (e.g. holiday baskets, a desk clock, etc.).

**4.2 Gift In-Kind:** a gift of goods or services.

#### **5.0 References**

**5.1 CASE** (Council for Advancement and Support of Education) Reporting Standards and Management Guidelines for Educational Fundraising Association of Fundraising Professionals (AFP) fundraising ethics.

**5.2 JCC Policy 222** Naming of Facilities, Spaces, and Programs.