

So You Want To Raise Money

Fundraising 101 for OU Departments + Student Organizations

The logo for Oakland University, featuring the words "OAKLAND" and "UNIVERSITY" in a white, serif, all-caps font, stacked vertically within a black rectangular box.

OAKLAND
UNIVERSITY™

You're In Good Company

About Oakland University

- Non-profit, publicly-funded institution
- Rely on donor support to make tuition more affordable, provide teaching and learning resources on campus, fund student scholarships and more
- Management of donor support must be carefully orchestrated



There is more to fundraising than asking, counting the money and saying thank you.

- Must adhere to IRS regulations
- Must follow student organization policies – sign-off may be required
- Must conform to university policies

Why you should pay attention to this.

- Tax Receipts
 - Student organizations CANNOT issue receipts
 - Must be clearly stated to donors
- Gifts made directly to OU and designated for an organization
 - CAN be receipted (checks must be made payable to Oakland University)
 - Need to go through OU's Development Office:
www.oakland.edu/giving
 - OU is required to follow donor intent

What you can't do. *Don't worry, there will be many slides of what you can do!*

- Use of university resources is prohibited
- OU email system CANNOT be used as a means for advertising or soliciting
- Position at OU may NOT be used to further the cause
- No preferred OU website placement
- OU will only promote fundraisers in which the university is the beneficiary
- CANNOT compete with OU fundraising

What you can do

- Events (golf outing, performances, auctions, etc.)
- Sales (t-shirts, raffles, tickets, etc.)
- Direct solicitation (letters, email, crowdfunding, personal solicitation, etc.)
- Sponsorships
- Other

Events!

Golf Outings, Dinners, and Auctions, Oh My!

- Must clearly state there is no tax benefit
- Should be worth the effort to put on the event
 - \$ raised vs. time/effort
- Cannot be scheduled during the study period or immediately during/after final exams

Sales

- If OU logo or the name “Oakland University” is used, you must follow OU marketing and logo guidelines and use approved vendors
- Raffles/drawings take a long time and a lot of planning and can affect student aid packages if an OU student is the recipient

Sales (Raffles & Drawings)

- What defines a raffle or a drawing?
 - Games of chance
 - Any time the prize is not given to everyone
 - When in doubt, contact OU Development & Alumni Relations (DAR) Office or the State of Michigan
- Must be approved through OU Development & Alumni Relations (DAR) Office
- License required from State of Michigan
 - Prior approval needed from Development Office
 - Allow 6-8 weeks for processing by State of Michigan
- Greek organizations are NOT allowed to hold raffles or drawings of any kind, per state rules
- Games of skill do NOT require state licensing (guess # of jelly beans in a jar)

Direct Solicitation

- Reaching individuals via letter, email, crowdfunding, personal solicitation, etc.
- Proofing is important!
- If an on-campus department may be affected, please let appropriate people know
- No approaching OU's major donors (people with names on buildings, for example!) – this could interfere with other university priorities

Corporate Sponsorship

- Need approval from Annual Giving and Corporate and Foundation Relations **before** asking
- Cannot compete with OU fundraising
- Publicly traded companies (Chrysler, Lear, IBM, etc.) must also be cleared through same channels
 - Rule of thumb: if you've heard of them, most likely we have too

Before You Ask For Money

- Each Department or Student Organization that plans to raise money should appoint/elect a *Fundraising Chair*
- Know what you can offer a sponsor
- Be prepared to follow up
- **All fundraising efforts must be approved by Annual Giving and Corporate and Foundation Relations**

What Can We Offer Donors and Sponsors?

- See the Sponsorship Worksheet (Toolkit)
 - Logo placement opportunities - T-shirts, uniforms, equipment bags, banner display, OC banners
 - Brand mentions — announcements during events, web site, social media
 - Sampling — product sampling/giveaways
 - Tickets

Your Toolkit

- Sponsorship Worksheet
- Prospect Worksheet
- Sponsor Levels Template
- Sponsorship Letter (e-mail) Template
- Thank You Letter Template

Approval Process

- Complete all of the worksheets and templates
 - STUDENT ORGANIZATIONS: Forward completed package to Jean Ann Miller (jam@oakland.edu), who will review and forward to Annual Giving
 - CLUB SPORTS: Forward completed package to Gabby Sokol (gesokol@oakland.edu), who will review and forward to Annual Giving
 - UNIVERSITY DEPARTMENTS OR PROGRAMS: Forward completed package to Michelle Bosau (bosau@oakland.edu), who will review and forward to Annual Giving
- Corporate & Foundation Relations and Annual Giving will review, offer suggestions, approve or deny package
- **PLEASE ALLOW AT LEAST TWO WEEKS FOR APPROVAL PROCESS**

Approval Process

How long should you allow for approval?

Approval Process

TWO WEEKS!

Now – Go Out and Raise Money!

- Once you have received approval, you may solicit the approved list of prospective sponsors
- Make sure gifts go through OU Gift Accounting
- Gift Accounting will send a tax receipt + a thank you letter.
- University Departments and OU Student Organizations should also send a personalized thank you letter
- Include photos of banners, participants wearing t-shirts, everything that you promised on the “sponsor benefits” list
- Excellent follow up leads to happy sponsors AND to your next gift!

Marketing Guidelines

- Must follow Communications & Marketing guidelines
 - OU logo [Oakland Logo Link](#)
 - Trademarked – organizations are “borrowing” logo which is owned by OU
 - Standards must be followed in electronic or print media
 - OU name – must also follow guidelines

Marketing Guidelines

- What NOT to do:
 - Stretch logo (common error!)
 - Create your own logo, even if there's a graphic artist in your group!
 - Alter the OU logo
 - Abuse the Grizz

Do Not Use “Channing Tatum Grizz”



On-Campus Philanthropy Project Ideas

- OUCARES
- Counseling Center
- OU Veteran's Affairs
- Meadow Brook Hall
- Keeper of the Dream
- Disability Support Services at OU
- Lowry Early Childhood Learning Center
- Alternative Spring Break
- Many more – hundreds of funds searchable by key word

Best Practices

- Good Stewardship
 - Hand written note of thanks
 - Be *thankful* no matter the amount of the donation
 - Make sure your supporters feel appreciated
- Record-keeping
 - Donors – name, contact info, gift amount, date received, etc.
 - Fundraising event details
 - Past members of your organization
- Evaluate your fundraising efforts
 - Create a report of successes & failures
 - Try to avoid reinventing the wheel

Keys to a Successful Departmental and/or Student Organization Fundraiser

- Determine audience – broad or targeted
- Perform a needed service or meet a need
- Be well-publicized using various media
- Bring the organization & the community together
- Capitalize on the talents of your organization

Fundraising Checklist

- Brainstorm ideas
- Determine your audience
- Set reasonable goals
- Determine what you can offer sponsors and make a list of prospects
- List resources needed
- Consider timing of event
- Collaborate with others
- Set a timeline for your campaign
- Develop creative marketing campaign
- Thank you donors and sponsors...then thank them again!

Shameless Plug

- If you enjoy fundraising for your organization, consider being active with the Student Philanthropy Committee
 - Student Org (does not receive funding)
 - Helps raise awareness of how donors make things possible at OU
 - Involve students and young alumni in philanthropy
 - Minimal time commitment
- Things we do
 - Organize thank you letters to donors (commencement fair, tabling)
 - Promoting our first all-campus student fund drive which will benefit student organizations
 - Attend special donor events to informally talk about the student experience

Resources

- Annual Giving and Corporate & Foundation Relations can help
 - Allow plenty of lead time
 - Provide outline of fundraiser

Any Questions?

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