




SUBJECT: FUNDRAISING AND SOLICITATION	Reference: GP-015
SECTION: GIFT PROCESSING PROCEDURES	PAGE: 1 OF: 3
DEPARTMENT: ADVANCEMENT SERVICES AND OPERATIONS	EFFECTIVE: 7/1/2020
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PURPOSE

The purpose of this California State University, San Bernardino guideline is to coordinate fundraising activity in order to maximize private philanthropy to the University. These guidelines are intended to reflect the University’s mission, vision and core values.

PHILOSOPHY

Private support plays a vital role in enhancing the University’s teaching, research and service efforts. Our fundraising programs focus on integrating the interests of the donors, with the planned priorities of the University. It is understood that anyone involved in fundraising at California State University, San Bernardino represents the University as a whole.

ASSUMPTIONS

A coordinated fundraising effort will help achieve the following common objectives:

- No multiple approaches to a prospective donor or agency at the same time. This conveys the impression that the University has determined its priorities and has an effective management structure.
- Maximum utilization of fundraising volunteers. Clear guidance to and consultation with the volunteers will result in successful fundraising.

- Clear communication between the Office of Philanthropic Giving and the assigned College or unit fundraisers. This leads to the efficient use of prospect information and professional services.

FUNDRAISING

The Vice President for Advancement and the Provost, or their designees, shall share responsibility for coordinating the solicitation of external funds.

The Associate Vice President for University Advancement for the Office of Philanthropic Giving (in coordination with the Vice President for University Advancement) is responsible for the leadership and coordinating of fundraising efforts across all Colleges and Units.

PRIVATE FUNDS

The Associate Vice President for University Advancement or designee, shall be responsible for initiating and implementing campus-wide coordination of all fundraising from private sources. This coordination includes those efforts by faculty, staff, students or volunteers to solicit gifts from private sources for CSUSB purposes. These purposes shall include academic, athletic, or student support programs and any gifts in the form of real and personal property for unrestricted or restricted use. All fundraising requests, regardless of amount, need to be approved by the Office of Philanthropic Giving.

The Office of Philanthropic Giving shall solicit gifts in the following forms: funds from individuals and family businesses, corporations, and appropriate foundations (covering family foundations, traditional private foundations, etc.). Funds may be solicited for capital projects, endowments, annual funds and other needs as identified. The types of gifts include, but are not necessarily restricted to, cash, pledges, securities, real estate, and appropriate gifts-in-kind, and appropriate forms of planned gifts. Faculty, staff, or students who wish to solicit funds from private sources for CSUSB purposes must have prior approval from University Advancement through their appropriate unit.

PUBLIC FUNDS

The Provost, or designee, shall coordinate the approval process for the solicitation of public funds and contracts through the Office of Sponsored Programs.

PLAN AND REPORTING

A university-wide goal for external support shall be set annually in consultation with the Vice President of Advancement, the Associate Vice President of Advancement for the Office of Philanthropic Giving, the Provost and the University President. The Office of Philanthropic Giving and the campus community shall work collaboratively toward the achievement of the annual goal. The Vice President for University Advancement or their designees, shall submit quarterly reports to the CSUSB Philanthropic Foundation (hereafter "Foundation") Board of Directors on private external support.

LEGAL RECIPIENT OF FUNDING

The CSUSB Philanthropic Foundation is the legal recipient of external funds raised on behalf of CSUSB

CONTINUOUS RENEWAL

This guideline shall be assessed every five years or as needed from its effective date to determine its effectiveness and appropriateness.