Affiliated Group Fundraising Guidelines

Thank you for your interest in raising awareness and support for Northwestern University. We are grateful for your gifts of both time and fundraising dollars.

Please note the following restrictions:

- Northwestern cannot help raise funds for another non-profit organization.
- Gifts to benefit student groups may only be raised for student groups with SOFO accounts.
- Northwestern is not able to assist alumni and student organizations that have hired professional fundraising firms to manage their fundraising efforts.

If you are eligible to raise funds on behalf of Northwestern University, please review these Fundraising Guidelines, and submit the Affiliated Group Fundraising and Service Request form for review no later than six (6) weeks prior to the proposed project. Until written approval is received, please do not solicit contributions or indicate you represent Northwestern for any purpose. Please allow five (5) working days from the receipt of your application for a written response.

Northwestern University Alumni Relations and Development can help with your fundraising efforts in the following ways:

- Provide professional consultation for your fundraising efforts.
- Provide an official online giving cart to collect and track your donations, as well as a link you can share with your target audience.
- Send automated receipts for gifts made online via Northwestern giving pages.
- Provide contact information for past group members (Affiliated Group Fundraising and Service Request form and confidentiality agreement required).
- Review promotional materials and, if appropriate, approve the use of and provide artwork and logo for approved printed or electronic materials.
  - The name Northwestern University may be reproduced on signs, literature, or printed materials only after approval from Northwestern University Alumni Relations and Development.
  - Northwestern University Alumni Relations and Development must review and approve all promotional materials, including but not limited to, use of logo, letters, flyers, and phone scripts prior to production and distribution.
  - Promotional materials shall state "Proceeds to benefit Northwestern University." This statement may be expanded to include the name of a specific program, scholarship or group. An example might be "Proceeds to benefit Men’s Club Lacrosse at Northwestern University."
- Send mass emails to your audience on your behalf through our email marketing platform, iModules. Some groups may be granted access to the platform, pending approval.
- Share status of fundraising totals at check points and at the end of your fundraising project.
Depending on staff availability, Alumni Relations and Development may be able to provide:

- Written tax receipts to donors who make checks payable to “Northwestern University.”
- Telemarketing services for your target audience.
- University-sponsored crowdfunding platform, for student groups, pending acceptance through our approval process.
- Posts and promotions, when appropriate, for your initiative or event on the Northwestern Alumni Association website, Facebook, Twitter, at existing events, and other calendar listings as appropriate, along with your contact information.

Additional Guidelines and Protocols:

Volunteer Assistance

- It will be the responsibility of the organizer(s) to recruit, train, and thank any volunteers involved in the project who might be calling, sending letters, or reaching out to their communities. Volunteers will also need to sign a confidentiality agreement if working with constituent information provided by Alumni Relations and Development.

Budgeting, Expenses, and Revenue Reporting

- Project organizer(s) will be liable for any expenses. Northwestern University will not be liable for the expenses and they may not be taken out of the charitable contributions raised.
- Within 30 days after the conclusion of the project, the organizer(s) must submit contributions to Northwestern University Alumni Relations and Development. Checks should be payable to "Northwestern University" with the specific designation indicated in the memo.
- Northwestern University Alumni Relations and Development will track all contributions from the online giving cart and report the total to your group. In most cases, individual gift totals will not be provided.

Receipting and Tax-Deductibility of Charitable Donations

- Any donations made online through your giving page or through checks made out to Northwestern University will be credited to the donor as a gift to Northwestern University, designated to your group.
- If you have a separate bank account or 501(c)3 and receive gifts directly to you, those donors will not receive credit as donors to the University and it will be your responsibility to provide tax receipts. **We highly encourage you to receive gifts through the University so we can track donor activity and provide the appropriate tax information.**
- Only Alumni Relations and Development Gift and Record Services may issue tax receipts on behalf of Northwestern University.
Use of Confidential Information

- Alumni Relations and Development (ARD) considers the records it maintains on alumni, donors, parents, and friends of the University to be highly confidential. Some information maintained by ARD may also be subject to the Family Educational Rights and Privacy Act (FERPA) or other protections. As a result, neither the records maintained by ARD nor the information contained in them should be disclosed to any entity outside of ARD or used for any purpose other than the legitimate business objectives of Northwestern University and ARD.

As policy, Northwestern University and/or Alumni Relations and Development cannot perform the following activities or functions for fundraisers it does not directly sponsor:

- Extend our sales tax exemption.
- Issue receipts for donations not made directly to Northwestern University, which includes In-kind donations.
- Provide mailing lists of donors, employees, or volunteers.
- Provide Northwestern University letterhead for your use.
- Provide banking, funding, or reimbursement of expenses.

By completing and signing the Affiliated Group Fundraising and Service Request, you agree to adhere to the Affiliated Group Fundraising Guidelines. If you have any questions about these guidelines, please contact groupfundraising@northwestern.edu.