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THE CAMPAIGN *for* **MICHIGAN STATE UNIVERSITY**



# **Scholarship Fundraising Tool Kit For Michigan State University Alumni Communities**

**Provided by the University Scholarships & Fellowships Advancement Office**



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## Greetings Fellow Spartans!

This tool kit was designed to help the Michigan State University alumni communities with their efforts at fundraising for scholarships that are awarded to students at MSU. These materials are intended to help plan fundraising efforts for the community's general scholarships — those that are distributed to undergraduate students regardless of major or degree program. It is our hope that the tips and ideas in this booklet will help your community to reach your scholarship fundraising goals for either endowed or expendable scholarships. We also want to inform you of ways that we can work together to help make Future Spartans' dreams come true.

## Go Green!

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Map: Building is marked in green.



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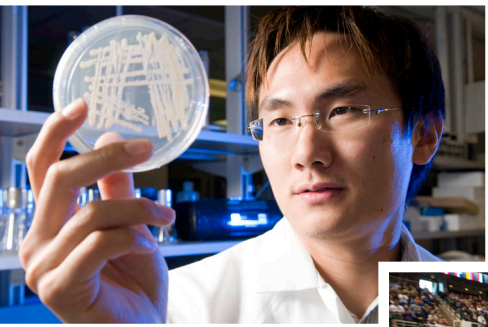
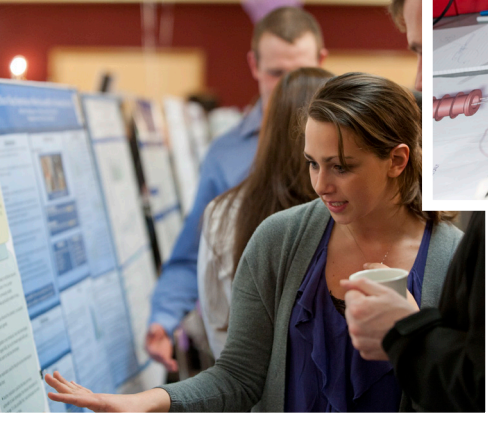
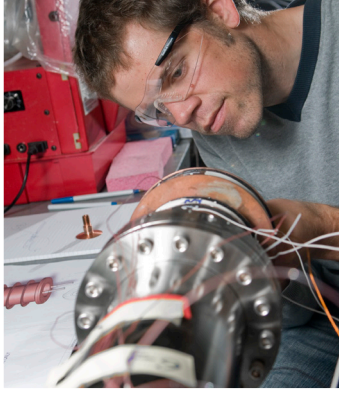
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# How You Can Help Students

There are a few things to consider when establishing and maintaining a scholarship. Here is some basic information about scholarships at Michigan State University.

## **Expendable Scholarships**

When donations are made to an expendable scholarship the donation itself is distributed to students. Scholarships can only be granted when there is funding made available through donations. There is no minimum amount required to establish an MSU expendable scholarship. The community can work with our office to establish the expendable scholarship agreement.

## **Endowed Scholarships**

Donations to an endowed scholarship are invested, and awards are distributed from the investment income. This means that the award lives on in perpetuity and can grant scholarships forever. A minimum of \$50,000 is required to establish an MSU endowed scholarship. This can be made in one payment, or pledged over a period of time up to five years. Our office will work with the community to draft a legal endowment agreement outlining the criteria and procedures for dispersing the awards.

## **For more information:**

Contact Amber Trudell at 517-432-7345 or [atrudell@msu.edu](mailto:atrudell@msu.edu).



## **A Word About Donations and Tax Credit**

It is important to note that the means of donation has an effect on tax credit for the donor. As a community, you can direct donors to send donations directly to MSU, or you may collect them yourself and forward them to MSU on behalf of the donor. Checks must be made out to Michigan State University in order for the donor to receive tax credit on their donation. If the donor makes the check out to the community, they may not be eligible for tax credit (this all depends on the 501(c)3 status of your community.) If you have questions about this, please contact our office.

### **For more information:**

Contact Amber Trudell at 517-432-7345 or [atrudell@msu.edu](mailto:atrudell@msu.edu).

# Asking for Gifts – Quick Tips

We realize that not everyone is comfortable asking for gifts to a scholarship. While much of a community's scholarship fundraising is a result of events and/or fees, on occasion you might want to ask a club member to consider an outright donation. Here are some quick tips to make this easier on the asker.

- Remember that asking for a donation is not begging. It is inviting peers to join with you to support a noble cause.
- Be familiar with where the donations will go. You want to be able to answer any questions that might come up.
- When asking someone for a “visit,” do not mention money. You can mention that you want to talk about the community's activities or their scholarship, but wait until you are speaking in person to bring up a donation.
- During the visit, remember E-E-E-I: empathy (be a good listener), energy (don't meet when you know you'll be tired and unable to carry on a conversation), enthusiasm (be excited about the scholarship fundraising), and integrity (be honest, up-front and on time).
- Part of the process is building the relationship. Get to know the person you are visiting, and talk about things you have in common. This is an opportunity to bring in more active membership and increase participation likelihood for community events.

- Explain why you made a donation and why you believe it is important for alumni to give back.
- If someone says no, find out why. Is there something that could be done to change their opinion?
  - Is it the institution? Find out what they didn't like about MSU/Alumni Association/Region and try to point out the good things.
  - Is it the objective? Maybe they don't want to support scholarships, but they're interested in volunteering or helping your community in another way.
  - Is it the amount? They can give whatever they feel comfortable.
  - Is it the timing? They can make a pledge and pay later, or make payments over an extended period of time.
- Sell the concept before giving them papers. If they are holding a brochure or pledge form they are less likely to listen closely to what you are saying.

# Fundraising with Events

A common way that alumni communities raise money for scholarships is through events. Typical events include auctions, golf outings, balls and meals. Fundraising can come from ticket sales (be sure to advertise the portion of the ticket price that goes towards the scholarship, as well as the type/name of the scholarship), donations at the door or donations related to auction items. An event doesn't always have to be designed with fundraising as a priority – you might consider having donation cards available at all community functions, including meetings and game-watch parties.





The first thing to consider when fund raising with events is whether it will be an MSU sponsored event or a non-MSU sponsored event. An explanation of these follows, to help guide your decision.

## **Non-MSU Sponsored Events**

- Non-MSU events are not audited for adherence to MSU business procedures, however the event must still follow good business practice and adhere to state, local and federal laws.
- The community's funds are used to pay event expenses (funds will be held in a separate bank or credit union account, or an MSU agency account, not an MSU account.)
- MSU's tax ID cannot be used for event expenses. You will pay taxes for the event if you do not have 501(c)3 status.
- Donors will not receive MSU gift or tax credit; however, if your community is established as a nonprofit entity [501(c)3], contributions to your organization may be tax deductible.
- There is no need to pay sales tax on goods received by those attending the events and on the value of donated items (thus the dollars raised by the function can all be directed to support the community's activities.)

# MSU Initiated & Sponsored Events

- Checks must be made payable to the legal name of the community and deposited by the community, not by MSU.
- All promotional material must clearly state that the event is a community-sponsored event.
- Proceeds from the event that are directed to MSU (or your MSU scholarship) will be considered a gift from the community, not the initial donor.

## **MSU Sponsored Events**

- MSU business procedures must be followed. The appropriate paperwork for in-kind donations of auction or raffle items and/or prizes must be completed. In addition, a gift consignment form must be completed for in-kind items donated for general event purposes, such as mementoes.
- Funds held in an MSU account can be used to pay for the costs of the event.
- The MSU tax ID can be used, avoiding the need to pay sales tax on items purchased for the event.

- Donors will receive tax and gift credit for in-kind donations upon receipt of appropriate documentation at University Advancement. In accordance with IRS regulations, donors making in-kind contributions will not be issued a tax-receipt by MSU.
- Donors will receive both tax and gift credit for overpayments on auction items, for gifts built into registration fees, and for sponsorship payments, in accordance with IRS regulations. Donors making cash gifts will be issued a tax receipt by MSU.
- Because MSU is tax-exempt and reselling to the public, sales tax must be paid on goods received by those attending the events and on the results of both auctions and raffles (this decreases the new dollars raised in support of the club or its initiatives.)
- Checks must be made payable to and deposited by Michigan State University.
- The event must be coordinated with University Advancement to ensure the proper handling of gifts.
- All event profits must remain with Michigan State University. They can be deposited to your scholarship account.

# Planning an Event – Next Steps

## **Questions on Policy**

For more information regarding these policies and answers to questions, please contact our office.

## **Event Communications**

For information regarding events communications, please visit <http://alumni.msu.edu/alumniGroups/toolbox/> and click on the communication menu link on the lefthand side. This link will provide you with information on “Evite” electronic invitations, e-mail marketing, websites, and mailing list requesting procedures.

## **Event Calendar**

The MSU Alumni Association website provides your community with the opportunity to publicize your event on the official MSUAA calendar. This tool allows alumni in your area to become aware of events. It is also utilized by University officials and staff when planning travel to your area. You may post events by visiting <http://alumni.msu.edu/alumniGroups/eventform.cfm>.



**Services for Your Event Provided by  
University Scholarships and Fellowships**

The University Scholarships and Fellowships Advancement Office is more than happy to assist your fundraising efforts. If you are planning a function with the specific aim of raising scholarship funding, we should talk. We may be able to assist with designing and/or providing donation cards and obtaining an MSU guest speaker or attendee (Note: Our office is unable to provide athletic coaches as speakers for events.) These services are all dependent on budget status, event type, date and location. Please contact us for more information. Also, please see the section of this booklet entitled Fundraising in Print for information on our publication services.

**For more information:**

Contact Amber Trudell at 517-432-7345 or [atrudell@msu.edu](mailto:atrudell@msu.edu).

## **Fundraising Using Printed Materials**

There are many ways in which your alumni community can raise funding using printed resources. These include, but are not limited to, direct mailings, informational brochures, and donation and pledge cards.

### **Direct Mailings**

Informational letters are often an effective way of notifying your community constituents of the opportunity to donate to your scholarship. It is important that you clearly communicate the goals of your fundraising efforts and explain where the money will go. Clearly state whether your scholarship is an expendable or an endowed award. You should also clearly state the tax credit implications of the gifts (see “A Word About Donations and Tax Credit” on page 7.) Our office can help you craft a direct mail letter if you would like. The letter can be printed on your community stationary. If you do not already have a letterhead design, we will be happy to design one for you to use with the letter.

## **Informational Brochures**

Your community may wish to have brochures containing information about your scholarship. You may also include photographs of previous winners or generic student photographs available through MSU. Brochures help to provide the “human element,” putting a face to the cause of your scholarship fundraising. They also allow you to provide more detailed information than can often be put into a letter. One possibility you might consider is mailing brochures to alumni within your region enclosed in a letter from the community. Brochures can also include donation or pledge forms for donors to send in donations. Please contact us if you would like more information on how we can help you design these brochures. We will provide your community with your first fifty copies for free, as well as a .PDF file of the brochure so that you may have additional copies printed as you need them.

## **Donation and Pledge Cards**

The easiest way to collect gifts is with a donation or pledge card. This is a giving device that donors fill out and submit with their donation to your scholarship. It ensures that proper information is recorded so that the donor receives correct gift and tax credit. It also ensures that the donation is deposited into the correct MSU scholarship account. Our office can design custom donation and pledge cards specific to your scholarship. Please contact us if you are interested in this.

Donation and pledge cards can be used in conjunction with your mailings (such as in direct mail letters or your community newsletter). They can also be made available at any club meeting or function.

### **For more information:**

Contact Amber Trudell at 517-432-7345 or [atrudell@msu.edu](mailto:atrudell@msu.edu).





## **Fundraising Using the Internet**

A developing trend in fundraising is using Web 2.0. The interactivity enabled by new internet sites can be a cost-effective tool for your community. Below are some ideas to consider when fundraising for your scholarship online.

### **Web-Based Donations**

MSU has the ability to accept scholarship donations on the internet. The University Advancement website, <http://givingto.msu.edu>, allows alumni and friends to donate to various MSU colleges and endowment funds.

### **Customized Donation Links**

We are able to create links to donation sites customized to your community's endowment(s). Clicking on this link will direct users to a website with your community's endowment pre-loaded into their "gift cart," and prompt them to enter the amount of their intended donation. This is a safe and secure way to give online, and it takes away the chore of collecting checks and submitting them to MSU for deposit.

### **For more information:**

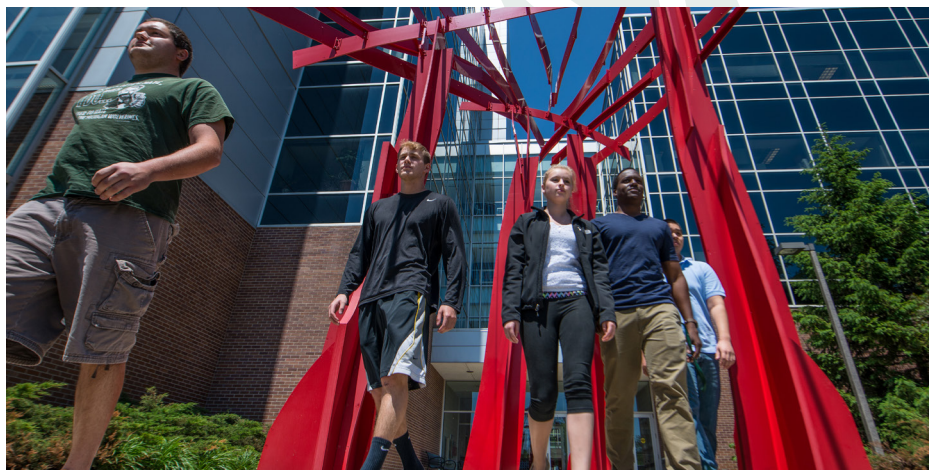
Contact Amber Trudell at 517-432-7345 or [atrudell@msu.edu](mailto:atrudell@msu.edu).

These customized links can be used in a variety of ways. We suggest placing them on your community's web page. Board members can include them in signatures on emails. Any electronic mailings that are sent to community members are also a good location. You can also place the links on any social networking site on which your community has a presence.

If you would like to have a customized donation link created for your community's endowed scholarship, please contact our office. The links can only be created for scholarships endowed through MSU. Please allow two weeks for programming.

**For more information:**

Contact Amber Trudell at 517-432-7345 or [atrudell@msu.edu](mailto:atrudell@msu.edu).



## Social Media Ideas

Here are a couple of ideas for online fundraising using social media networks.

- If you are on Twitter, occasionally tweet about your scholarship. This might include simple announcements regarding the existence of the scholarship, links on how to give (see above section), congratulatory announcements when recipients are named, etc.
- Twitter users can follow us at @SupportSpartans for information regarding scholarships as well as University news.
- Encourage board members to talk about the scholarship within their own networks, both online and offline.

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## Connect with us!

Stay up to date with the latest news at [SupportForStudents.msu.edu](http://SupportForStudents.msu.edu).

Search “SupportSpartans” on your favorite social media platform to connect with University Scholarships & Fellowships.

We can be found on Facebook, Twitter, Instagram, YouTube, Pinterest, and Flickr.



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