

Policy Documents

Terms and Conditions (Example 1)

[INSTITUTION], in its sole discretion, will select the participating projects. [INSTITUTION] reserves the right to discontinue an active fundraiser at any time for any reason, without notice, including without limitation because of a group's eligibility status or a group's failure to comply with the [INSTITUTION]'s policies.

To ensure compliance with [INSTITUTION] policies, all projects must be approved by an appropriate [INSTITUTION] program director, staff advisor, or faculty member.

Volunteer fundraisers are responsible for promoting their cause, preparing a personal thank-you message to donors, and submitting status updates to [INSTITUTION]. [INSTITUTION] will provide all official tax receipts issued to donors.

All participating groups are required to comply with [INSTITUTION] policies and procedures for the solicitation of gifts. Policies and procedures will be reviewed at a required training session on [DATE].

All funds raised must be directed to the [RECEIVING OFFICE] for deposit. All monies raised will be used for the stated intention of [INSTITUTION] fund identified in the solicitation.

Premiums are not to be used to induce gifts. Incentives and sales such as, without limitation, bake sales, t-shirt giveaways, car washes, or similar events or activities are not permissible.

Volunteer fundraisers are strictly prohibited from keeping any portion of the funds raised as profit or compensation.

Policy Documents (cont.)

Terms and Conditions (Example 2)

All monies raised must be used towards the stated intention. Projects that reach the stated goal before the allotted time will be removed from the active projects listing. Awarded funds may not be applied towards projects that will generate profit for individuals.

Each project will be hosted on the [INITIATIVE] website for a pre-determined amount of time. If the project is not funded within this timeframe, student groups are encouraged to continue fundraising efforts; however, [INSTITUTION] will no longer actively market the project.

Club representatives for accepted projects must attend a mandatory accepted-projects meeting prior to the beginning of their fundraising campaigns. They must also attend a minimum of one stewardship workshop during the semester. Dates, times and locations for both sessions will be made available in advance.

Students are responsible for promoting their own campaign via social media and on campus, preparing a personal thank-you message to donors, submitting monthly updates on the status of our project, and upon invitation, taking part in a student showcase event.

Projects must be completed within one year of a successful fundraiser.

Multi-stage projects may be broken into multiple campaigns if stages can be defined by a completed product, event, activity, or service.

[INSTITUTION] reserves the right to decline any project based on content or discontinue an active fundraiser at any time due to any changes in the student group's eligibility status.

Policy Documents (cont.)

Confidentiality Agreement

The user acknowledges that he/she may have access to certain Confidential Information (defined below) of [INSTITUTION] during [INITIATIVE] and, as a condition of accessing such Confidential Information and using [INSTITUTION]'s resources, hereby agrees as follows:

1. "Confidential Information" means all confidential and proprietary information owned by or relating to [INSTITUTION] or any of its affiliates, potential donors or donors, however disclosed, and including, without limitation: names, addresses, donation amounts, contact details, financial information, and other information relating to donors or donations; internal practices and procedures; and any other information relating to the business of [INSTITUTION].
2. The Confidential Information is highly valuable and proprietary to [INSTITUTION] and shall remain the exclusive property of [INSTITUTION]. The user shall hold the Confidential Information in strict confidence and shall only use the Confidential Information for purposes that have been pre-approved by [INSTITUTION] and are consistent with [INSTITUTION] policies and procedures.
3. Without limiting the restrictions set forth in Section 2, (a) the user agrees not to, without the prior written consent of [INSTITUTION], disclose, print, copy, download, place or store in a retrieval system, transfer, or make any unauthorized use of the Confidential Information; and (b) the Confidential Information shall not be used, directly or indirectly, to confer a private benefit upon one or more individuals, to participate or intervene in any political campaign, or otherwise to the detriment of [INSTITUTION].
4. The user agrees that unauthorized use or disclosure of the Confidential Information would cause the Institution serious or irreparable harm. Breach of this Agreement may result in (a) the restriction or denial of access to the Confidential Information and [INSTITUTION]'s resources, (b) a report to [INSTITUTION] and appropriate disciplinary action by [INSTITUTION], and (c) legal action against the user by [INSTITUTION] and third parties.
5. Upon notice from [INSTITUTION] or upon completion of the pre-approved purpose for which any Confidential Information is obtained or provided, the user shall immediately destroy or deliver to [INSTITUTION] any Confidential Information and all copies thereof, whether in hard copy, computerized, or other form that he or she has in his or her possession or control.
6. The user agrees to take all measures necessary to safeguard use of and access to those accounts to which user is granted access by [INSTITUTION] ("Account Credentials"). The user agrees to keep confidential and not share with any third parties his or her Account Credentials and to notify [INSTITUTION] immediately if he or she believes that any unauthorized person has gained access to the Account Credentials or if the Account Credentials have otherwise been compromised.