

Policy Owner: Finance and Administration  
Policy #: 08-006P  
Policy Title: **Contributions to Charitable Organizations  
(a/k/a Fundraising to Support External Entities)**  
Revised Date: 8-19-2019

**Policy Preface:**

Gifts to charitable organization are generally not allowable (except by student organizations) per [USNH Policy 08-006](#).

In order to address the above USNH policy on charitable contributions. Plymouth State University has established the following policy and guideline related to fundraising activities on campus for the benefit of individuals/organization outside of PSU/USNH.

**Policy:**

Charitable fundraising activities for the benefit of external parties are generally not allowable, except by registered student organizations or official athletic teams.

The University understands, however, there may be times when this is a worthwhile activity due other intrinsic values gained from it. Approval of such activity is determine on a case-to-case basis and factors in learning outcomes/institutional value, institutional risk and institutional resource investment. Based on this, PSU has pre-determined the status of some types of these activities:

Unallowable Activities:

- Those involving the collection of cash, check or credit card payments (in person or online) by PSU faculty, staff, students or volunteers.
- Those involving the use of PSU financial resources to produce, host or otherwise support the activity.
- Those activities that benefit for-profit organizations.

Allowable Activities:

Key Criteria:

- Beneficiary is a charitable/not-for profit organization
- Activity does not involve the use of PSU financial resources in the development, execution or delivery of the items/activity.
- Activity does not involve students handling cash, checks or credit card payments.
- There is no conflict of interest (perceived or actual)
- Collection of tangible items (clothes, food, etc) with no use of PSU financial resources in the development, execution or delivery of the items/activity.
- Non-financial Support services provided to an external partner's own fundraising event. (ie. promoting, scheduling, researching, other administrative duties)  
*Note: This activity is not a fundraising activity but rather is a service activity. This requires a signed contract (also sometimes referred to as a Memorandum of Understanding) between PSU and the external partner. The PSU employee supervising this activity shall contact [psu-contracts@plymouth.edu](mailto:psu-contracts@plymouth.edu) with an outline of the activity to get the draft contract/MOU started.*

NOTE: If one of these allowable events/activities is going to occur, notification needs to be sent to the head of your Division (President/VP/Provost) prior to it start– see [Notification Procedure](#)

If you have an idea not covered above or you seek an exception to one of the unallowable activities, a request needs to be submitted and approved - see [Request For Exception Process](#).



Finance and Administration

**Fundraising for External Entity – Notification Procedure for Allowable Activities** (see [policy](#))  
(lead time required – 2 weeks)

**Step 1:** Send an email to your Division Head (President/Vice President/Provost) or designee

Include the following information:

- Who: The name of the not-for-profit organization to receive the benefit/gift
- When: Date or date range
- Where: Location of the activity
- What: Outline of what the fundraising activity entails
- Why: What is the value gained from this activity? (Business purpose?)
- Disclosure of any conflicts of interest (perceived or actual)
- If it's a service activity as defined in the policy, acknowledge that a contract/MOU is or will be in place prior to the start of the activity.

**Step 2:** Division Head or designee reviews and tracks the notifications.

The tracking report should include:

- Term of activity
- Course title
- Requestor/Faculty Name
- Cluster
- Academic Unit
- Short Description of Activity (ie marketing services; food drive)
- Beneficiary's name
- Contract execution date:
  - Enter the date of the final signature
  - enter TBD if it is needed but is not yet final
  - enter N/A if a contract is not necessary

The Division Head or designee will only follow-up with the requestor *if* there is an issue/concern about the information that has been provided. As such, the requestor can continue on track with the activity if he/she is not communicated with otherwise.

If the notification acknowledges a need for a contract/MOU, complete Step 3.

*(Examples of activities not requiring a contract are independent activities such as food and clothing drives.)*

**OR**

If a contract/MOU is deemed necessary, but the notification does not acknowledge this, complete Step 3.

*(Required if services are being provided to the beneficiary and students are working directly with, on behalf of or alongside employees/volunteers/members of the beneficiary organization)*

When in doubt contact your Financial Service Center Manager to find out if a contract is required.

**Step 3:** Contract review/approval

- (a) Requestor will contact [psu-contracts@plymouth.edu](mailto:psu-contracts@plymouth.edu) to initiate a contract.
- (b) Once a draft has been completed by requestor, the draft is returned to Division Head (or designee) for review and internal signature
- (c) Final Draft of contract is forward to VPFA or AVPFA (or designee) for final signature by requestor.



# Plymouth State UNIVERSITY

Finance and Administration

## Fundraising for External Entity - Request for Exception Process (lead time required – 1 month)

### Step 1: Submit Request to Division Head (Vice President/Provost)

Note: Request Form is under development. Until then, send an email including the following:

- Who: The name of the not-for-profit organization to receive the benefit/gift
- When: Date or date range
- Where: Location of the activity
- What: Outline of what the fundraising activity entails
- Business Purpose: Explain how this benefits the University and/or learning outcomes of the students
- Financial summary (explains what dollars are being used for what purposes and who's handling payments – PSU and/or external entity)

If approved, move to Step 2.

If not approved, skip to Step 3.

### Step 2: Finance Approval:

- a) Campus Approval: Division Head sends request form and rationale for support to Associate Vice President for Finance & Administration.

If deemed necessary by VP or AVP for Finance and Administration:

- b) USNH Approval: Campus approved request is sent to Vice Chancellor of USNH for final decision.

**Step 3:** Final disposition of the request is communicated to the requestor from the Compliance & Planning Office. If a contract is required, this will be identified accordingly by the Compliance & Planning Office.