

Thank you for your interest in pursuing a fundraising activity to benefit SWOSU! Your adherence to the following requirements is appreciated.

1. Please fully complete the Fundraising Activity Application, and if necessary, the Fundraising Event Application (only needed if there is a separate event). Incomplete forms will be returned to applicant.
2. Obtain necessary signatures; any use of SWOSU resources – personnel, facilities, equipment, supplies, etc. – needs to be arranged by you or your designee with the appropriate campus offices.
3. Provide documentation of SWOSU-branded items and (if needed) design approval from the university's Public Relations & Marketing Office to ensure that all materials relevant to this fundraising activity comply with university policies. If not provided, application will be returned.
4. Any event that includes non-students and involves a financial transaction (registration fee, ticket purchase, sponsorship benefit, etc.) is subject to additional rules and IRS regulations. Contact the Foundation for information.
5. Please contact the Foundation staff at 580-774-3267 with questions. Return all required forms to:
Office of Institutional Advancement
Burton House
100 Campus Drive
Weatherford, OK 73096

IMPORTANT - Per SWOSU and SWOSU Foundation policies, **all** communications and related contact lists – print, digital, verbal, or otherwise – regarding this approved fundraising activity must be reviewed and approved by the Office of Institutional Advancement (OIA). This ensures that the SWOSU brand is consistent, that alumni and donor opt-outs are honored, and that we are in full compliance with National Change of Address and mailing standards.

The Foundation reserves the right to remove from solicitation or sponsorship lists any constituent who has requested no contact, has been previously contacted for alternate purposes, or other reasons as determined by the director.

Allocation of the proceeds of this approved fundraising activity may be impacted by separate agreements between the fund signatories and the University or the Foundation.



FUNDRAISING ACTIVITY APPLICATION



This fundraising activity will benefit (please check one): [] SWOSU account # [] Foundation fund #

Please describe the fundraising activity (name of activity, how funds will be raised, who will be asked to contribute, who will manage the activity, where the activity will occur, etc.):

Contact Person: Name Phone Email

Will this activity require SWOSU resources? [] No [] Yes

If Yes, please list resources needed: SWOSU personnel

SWOSU facilities

SWOSU equipment/supplies/services, etc.

Will any external source(s) be donating resources to this activity? [] No [] Yes

If Yes, please list the donor(s) and resource(s):

Will this activity include sales of SWOSU-branded items? [] No [] Yes If Yes, please provide documentation of the item design approval as received from SWOSU.

Will this fundraising activity include an actual event? [] No [] Yes If Yes, please complete a SWOSU Fundraising Event Hosting Application (attached).

By my signature below, I affirm that I have authority to grant permission of usage of the location specified in this document for the purposes specified in this document. I also agree to indemnify the SWOSU Foundation, Inc. for any liability, expenses, or damages incurred as a result of the SWOSU Foundation, Inc.'s involvement with the activity specified in this document.

Signature of authorized SWOSU Venue Coordinator (if applicable) Date

By my signature below, I affirm that I accept responsibility for conducting and reporting on the activity requested in this application. I understand that I am responsible for ensuring compliance with the laws and ordinances established by the City of Weatherford, the County of Custer, the State of Oklahoma, and the United States of America and with the rules and guidelines communicated to me by the SWOSU Foundation, Inc. Additionally, I agree to indemnify the SWOSU Foundation for any liability, expenses, or damages incurred as a result of the SWOSU Foundation's approval of this activity.

Signature of SWOSU Fundraising Activity Applicant Date



FUNDRAISING EVENT APPLICATION



PLEASE READ BEFORE COMPLETING

This application should be completed ONLY if a SWOSU Fundraising Activity Application has already been completed and ONLY if the Activity includes an actual event.

Please DO NOT submit this application for processing separate from a completed SWOSU Fundraising Activity Application.

Event date: ___/___/___ Event time: ___:___ a.m. p.m.

Would you like to serve alcohol at this event? [] No [] Yes

Will event attendees/participants engage in physical activities? [] No [] Yes

Will SWOSU employees volunteer at this event? [] No [] Yes

Will non-SWOSU employees volunteer at this event? [] No [] Yes

Who is invited to attend and/or expected to participate in this event? (please check all that apply):

[] General public (ages 18 and above) [] SWOSU students [] SWOSU Alumni and Emeriti

[] General public (under age 18) [] SWOSU employees

Please describe the event in detail:

Office of Institutional Advancement

[] Completed application(s) received [] Signatures included [] SWOSU-branded items approved

Application(s) approved by: _____ Date _____
Signature Date



FUNDRAISING EVENT
PROCESSING DETAILS



Events are valuable engagement and cultivation activities and often result in further giving to SWOSU. Strategic planning and implementation, as well as process compliance, lead to successful events and beneficial outcomes.

In addition to database needs, there are IRS legal requirements that pertain to events. These rules are strict and must be followed to avoid possible fines, loss of 501c3 eligibility, and in extreme cases, even revocation of NCAA status.

University-sponsored student events (i.e. football, soccer, or basketball games) are not affected, as these rules do not apply to the ticket purchase for student sports. Any event including non-students and requiring a financial transaction is subject to these rules.

The following information is required for each event that includes a financial transaction: 1. the price of whatever transaction is involved (for a sport tournament - the registration price; for a dinner - the ticket price; and other event types with a "fee to participate"); 2. the price of sponsorship packages (the actual price of the package, and what exactly is included in the package - number of registrations, number of seats at the dinner table, advertising rights, etc.); and 3. the **cost** (known as Fair Market Value) of the items the sponsors and participants are receiving (price of the green's fees at the course, T-shirt, gift bag, or other giveaway, hors d'oeuvres/ dinner and/or drinks, etc.).

As sponsorships are received from individuals and organizations, the **FULL name, address, and phone number** of the main contact for this transaction is required.

Fundraising Activity: _____ Date: _____

SWOSU account # _____ OR Foundation fund # _____

Sponsor: _____ Address: _____

Phone: _____ City, State, Zip _____

Ticket price for individual: \$ _____ Ticket price for table: \$ _____

Package Price for sponsor: \$ _____

Early bird discount? No Yes \$ ____ or ____%) Cutoff date? _____

List anything that the purchaser receives for this price (dinner, drinks, souvenir item, advertising, tickets, etc.) and include the Fair Market Value (FMV) of each:

Item	FMV
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____