



INDIANA UNIVERSITY
Fundraising Disclosure Guidelines

INTRODUCTION

After review by the IU Office of the Vice President and General Counsel (OVPGC) and legal counsel for the IU Foundation, we are poised to implement new fundraising disclosure requirements. Numerous state laws require charitable organizations to include specific disclosures in written solicitation materials. In order to comply, **IU, IUF, and IUAA must include a fundraising disclosure in all written materials that are used to solicit donors, whether in paper or electronic form.** This includes any piece that incorporates solicitation language, even if the purpose of the piece is not strictly solicitation.

TIMELINE OF IMPLEMENTATION

1. Implement immediately.
2. Existing stock forms MAY be utilized until depleted.
3. Any new fundraising projects shall include the disclosure.

DISCLOSURE STATEMENTS

The disclosure statement below should be utilized for most solicitation materials:

The Indiana University Foundation solicits tax-deductible private contributions for the benefit of Indiana University and is registered to solicit charitable contributions in all states requiring registration. For our full disclosure statement, see <http://go.iu.edu/89n>.

For solicitation advertisements or postcards, this shorter version below may be utilized:

Fundraising Disclosures: <http://go.iu.edu/89n>

WHAT TO DO

1. Include language above and a link to the disclosure in every solicitation piece issued.
2. Include the IUAA-branded disclosure in all IUAA membership solicitations.
<http://go.iu.edu/e0R>

3. Include the disclosure in all email solicitations.
 - a. IU Foundation and IUAA already include the disclosures in all email footers.

FREQUENTLY ASKED QUESTIONS

1. Are there guidelines about the font size or placement?

- Use your best judgment. There are no specific requirements. The font should be large enough to be legible.

2. Are there any examples of solicitation pieces that include the disclosures?

- See the Donor Reply Templates on IQ/Fundraisers Toolkit/Annual Giving.

3. What types of print materials would require the disclosures?

- Gift or membership forms, brochures, cards, and solicitation letters
- Gift or membership solicitation advertisements
- Gift or membership renewal forms
- Newsletters that include fundraising language (give/support)
- A case statement about supporting a unit
- A major gift proposal for donors living in the affected states ([See states](#))

4. What types of electronic materials would require the disclosures?

- Gift or membership solicitation emails
- Online event forms that cross-sell or bundle a gift or membership
- Gift or membership renewal forms/ads
- Newsletters that include fundraising language (give/support)

5. What types of materials would NOT require the disclosures?

- Materials without an ask (no giving or membership language)
- Receipts or acknowledgment letters
- Carrier and reply envelopes (unless the teaser is a solicitation, e.g., “Give to IU” on the exterior of an envelope is a solicitation)
- Brand advertising which is not a solicitation
- Membership or gift pledge reminders
- Pledge confirmations (print or emails)
- Membership welcome packets
- Affinity sales (credit cards, license plates, etc.)
- Advancement websites
 - Give now buttons on IU webpages redirect back to IUF website, which contains the disclosures in webpage footer

6. Who can answer additional questions?

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