**Foundation Forms:**

**When do I need to use these forms?**
- When you are asking for money to support something.
- The funds are being deposited to an account at the SIU Foundation.
- If a tax deduction is needed for the donor.

**Things to consider:**
- Is this an event approved by the university?
- How much money can we raise doing this event/solicitation vs. how much time and energy it will take to produce?
- Is this fundraiser for a purpose that will benefit my department, college, or university?

**Direct Mail Appeals, Special Events, and Telephone Solicitations:**
- This is the main form that has to be filled out for everything. This is the form requiring signatures of Dean and Chair/Director, and Development Director. The request will not be accepted unless you have this form completed with all the necessary signatures.
- Make sure on your solicitation literature or mailing that you use the following text somewhere on your piece: *In furtherance of the goals of Southern at 150, SIUC and the SIU Foundation retain six percent of all gifts to strengthen the advancement program.* Doesn’t necessarily have to be big, just has to be on there.
- If you are doing a mailing:
  - You need to attach a copy of a draft of what your piece/letter will be to your completed form.
  - You will need some sort of “reply device”. This is for the donors to fill out and return with their donation. The coding will be listed on your reply device.
  - You should also consider using Business Reply Envelopes. Development Director has some available, check with Director for envelopes.
  - Need to consider who you are mailing to, do you need a list from the alumni/foundation or do you already have the names?
  - If there is a FMV, you need to include the tax deduction amount on the piece.
- Do NOT mail your piece/solicitation until you receive your coding. There can be IRS consequences if we are not within the guidelines.
- You need to allow 15 working days (no less than 10 working days) time for processing. Every solicitation must have coding on it. Coding has to be renewed every year.
- If an event is charging for admission or other, you will need to determine Fair Market Value (FMV) and fill out the Solicitation with Premium or FMV Form.
- To determine FMV, calculate your actual costs (for a dinner, CD, shirt, etc) vs. what the donor is paying. If a donor is paying $100 for a dinner, but you’re only paying $20 a person, the FMV is the $20 and the tax deduction to the donor is the $80.

**Solicitation with Premium Form**
- Use this form when you have different levels of giving with different benefits. For example, donors of $100 get items A, where donors of $200 get items A and B.

**Event Approval Form**
- Use this form when you have the same benefits for everyone. Examples are dinners, everyone is paying same amount and receiving same benefit.

If you have any questions, please do not hesitate to call 453-4563. This information is provided to speed up the processing of requests.