

Mortar Board Chapter Operations

Chapter Fundraising[®]



No matter your chapter size, chances are you need to do some type of fundraising activities to have the funding you need to complete your year in Mortar Board. Funds can be used for a wide variety of things, from donating school supplies to a local elementary school to financing your chapter's initiation ceremony. Your chapter at least should collect enough funds for their membership year and also leave some for the next group to start with. Ideally, you should leave the next chapter with the full budget for one year.

Creating a fundraising plan

- Early in the year, collaborate with your advisor and create a budget for the year. By creating a very detailed budget, you will know exactly how much you need to raise during the year and when.
- Decide your strategy for fundraising. Does your chapter have the means to hold one large fundraiser at the beginning of the year, or would you be better off completing smaller projects throughout the year?
- Consider your sources. Do you need to raise all of your funds or can you get grants from other sources?

Best practices for fundraisers

- Visit the Mortar Board Web site for project ideas.
- Talk to your chapter members before committing to any fundraising project. It is important to choose projects members are interested in completing to maximize turn-out.
- Have a participation policy for members. Consider requiring each member to participate in at least one fundraiser per academic term.

How to motivate members

- Choose enjoyable fundraising projects whenever possible. Even if the fundraising project is mundane, try different strategies like creating competition between members, adding humor and socializing after the event.
- Put different members in charge of organizing projects, or consider forming a fundraising committee to get more people involved in the planning.

Tax exempt status

- Mortar Board, Inc. is considered a charitable organization by virtue of its classification as a tax exempt organization under section 501 (c)(3) of the Internal Revenue Code. Because of its connection with Mortar Board, Inc., your chapter is considered a charitable organization as well; and your chapter has a federal tax identification number (if you need it, please call the Mortar Board National Office). As a charitable organization your chapter is eligible to receive tax-deductible donations so long as no goods or services are received by the donor in return for the donation.
- Status as a charitable organization may mean that, in your state, your organization is exempt from the payment of state sales tax. Your chapter may be required to file a report with your state auditor annually verifying your status as a charitable organization. Sales tax exemptions usually mean that your chapter need not pay sales tax on items purchased for the good of the organization (e.g., copies of the printed program for your fundraiser) but must pay sales tax on items that will be used by individual participants or members solely for their own personal benefit (like a leather portfolio that the individual buys through the chapter for use during and after the event).

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Mortar Board Chapter Project Grants and other sources of funding

- The Mortar Board National Foundation awards Chapter Project Grants three times each year. The deadlines for application are **October 15, December 15 and May 15**; applications can be found in the chapter resources section of the national Web site. Award amounts vary each time, but are meant to serve as seed money for new or extensive projects. Be sure to put together a thorough proposal for your funding so the grant selection committee can make an informed decision.
- Check with the student activities or student life office on your campus for additional funding. Many universities award student organizations operating funds or special project funds to help them complete their objectives.
- Don't forget the community. Many businesses are very willing to donate goods or services for events that will give their products visibility.



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