ANNUAL FUND PROJECTS PROGRAM –

GUIDELINES

Development and Alumni Engagement

University of Prince Edward Island

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The Annual Fund Projects Program – Guidelines

1. What is the UPEI Annual Fund?

The Annual Fund is a fundraising program at UPEI, administered by the Department of Development and Alumni Engagement, which raises money for resources, programs and projects across campus. Each year, the Annual Fund receives unrestricted donations from generous alumni, friends, faculty and staff who are keen to invest in UPEI and its students. This money is used to support the Annual Fund Projects Program.

2. What is the Annual Fund Projects Program?

The Annual Fund Projects Program provides 'one-off' financial contributions for innovative projects and activities that aim to enhance the student experience and the UPEI community.

- Applications may be submitted on or after March 1st in order to be considered for funding in the next fiscal year. UPEI's fiscal year is May 1st to April 30th.
- Reminders to submit applications will be sent out prior to March 1st of each year through the *Campus Connector* and *Campus Notices*.
- Applications will be reviewed by June 1st.

3. Who should apply?

Applications are encouraged from all areas of the University, including, but not limited to, faculties and administrative areas.

The Annual Fund Projects Program is designed to support activities and initiatives that cannot normally be funded from operational budgets.

The Annual Fund team encourages you to coordinate your application with the relevant faculty and administrative area. This will assist you to ensure your project has the best chance of being approved when submitted to the Selection Committee for the Annual Fund Projects Program.

Guide to applying:

Step 1: Interested departments are welcome to submit applications for funding on or after March 1st. Official applications (see Appendix A) must be received by <u>April 30th</u> to be considered for the next fiscal year. Please note: other forms of application will not be considered, but you are free to attach additional information to the completed official application.

Step 2: Applications must be filled in completely. This will allow for a fair review and evaluation of all projects by the Selection Committee, a group of senior officials tasked with this review and the ultimate selection of successful applicants based on the available funds.

Step 3: Quotes are to be submitted with each application. The amount of funding requested will determine the number of quotes needed (Under $3,000 – 1 quote; from $3,000 - $10,000 – two quotes; over $10,000 – 3 quotes).

Step 4: Applications are to be signed by the person requesting funding as well as their respective Dean or Director.

Step 5: Completed applications can be submitted to:

Attention: Administrative Assistant
UPEI Development and Alumni Engagement
Steel Building, Room 108
Email: dev-alumni@upei.ca

4. What should I include in my application?

To ensure the best possible chance of your application being approved, please ensure you:

- Complete the <u>entire</u> official application form.

- Include all relevant details in your description, such as:
    1. How does your project benefit your area?
    2. Who will benefit from your project (including how many students, if possible)?
    3. How does your project meet the UPEI Strategic Plan?
    4. How will you acknowledge the Annual Fund in this project?

- Include all relevant details in the *total costs* and attach necessary quotes.

5. What type of projects will be considered?

Projects should provide the widest benefit for students, the University and the wider community, with particular focus on enhancing the student experience. The following types of projects will be considered:

- those that meet a clearly expressed student or academic need, particularly as outlined in the UPEI strategic plan;
- student-led projects that benefit the University and wider community; and/or
- pilot projects or initiatives within a specific area that provide a clear explanation of how the project would be funded in future years.

6. What types of projects will not be considered?

- those that require funding on an ongoing or multi-year basis;
- research projects which are eligible for grants from standard research grant sources;
- retrospective funding;
- recurrent funding for operations;
- replacement staff costs for sabbatical or other leave;
- staff conference funding (other than early researchers);
- projects that will directly or indirectly support other charities or organizations with charitable status;
- applications to provide food or drink at an event.

7. Who decides which applications/projects are successful?

Applications are reviewed and approved by the Selection Committee.

The Committee's membership comprises:
-UPEI President
-Director of Development and Alumni Engagement

8. When will I find out if my application has been successful?

The Selection Committee will meet by June 1st of each year to review applications. Successful applications will be notified as soon as possible after selections are made.

9. What are the conditions of the Annual Fund Projects Program?

Criteria for Receiving Funding
- Funds must be solely used for the intended purpose outlined in the project application. Any project that does not adhere to this will be required to repay the funding in full.
- Successful projects will receive the funds from the Manager of the Accounting Office who will create Annual Fund Project accounts and transfer the funding into the respective accounts. Any funds unspent by the end of the fiscal year that they are awarded will be returned to the Annual Fund and will form part of the total pool of funds available in the next fiscal year.

Criteria for Receiving Funding – Publicity and Reporting
- Successful recipients will be contacted by the Department of Development and Alumni Engagement to discuss publicity materials, including project updates and photograph/video material requested for the UPEI website and donor communications. Fulfilling any requests for such material is a condition of funding and will assist in raising the profile of your project, your work areas and the Annual Fund Projects Program. Accountability to donors is of the utmost importance.
- Recipients are encouraged to keep the Development and Alumni team informed of their project's progress, and are obliged to submit a report to the Development and Alumni Engagement Office three months after the funds are awarded. The Annual Fund team will provide a questionnaire, which will outline the progress and/or outcome of the project and explain the impact of the funds.

10. Who can I contact to further discuss my application?

You can contact the Administrative Assistant in the Department of Development and Alumni Engagement at dev-alumni@upei.ca or 902-566-0415.

Please note that the Selection Committee members should not be contacted directly with queries about the application process or related questions. All queries should be directed to the Department of Development and Alumni Engagement.

Appendix A

Application for Funding from Annual Fund Projects Program

Feel free to type the answers to the questions below in a separate document and attach to this form.

Please print clearly

Name _____   Title   _____

Department   _____   Telephone # _____

Email _____   Date of application _____

1. Please describe your project in as much detail as possible (include photos, if available).

2. How will this project benefit your area?

3. What are the total costs, including taxes and shipping, associated with your project (please attach quotes)?

Signed:

_____   _____
                Applicant   Dean or Director

_____   _____
                  Date   Date