



# Policy on presidential acknowledgements

**Policy Type:** Local

**Responsible Office:** Office of Development and Alumni Relations

**Initial Policy Approved:** 03/01/2013

**Current Revision Approved:** July 2015

## Policy Statement and Purpose

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The VCU Office of Donor Relations seeks to create meaningful relationships between donors and the university through a quality program of stewardship, engagement and special events. Proper stewardship helps to ensure a positive giving experience that will influence both future giving behavior and what the donor will say about our institution to others.

Donor Relations coordinates-high level donor acknowledgment letters and phone calls on behalf of the president of VCU. These acknowledgements serve as a critical stewardship activity by thanking the donor for their gift. In accordance with best practices, acknowledgements are to be completed in a detailed, meaningful and timely manner.

The president acknowledges all new gifts and pledges of \$100,000 or more with a personal phone call.

Additionally, the president acknowledges with a personal letter:

- New gifts, new pledges, bequests and pledge completions by individuals of \$25,000 or more
- New gifts, new pledges and pledge completions by corporations and foundations of \$50,000 or more
- New gifts and new pledges from any Board of Visitors member, at the discretion of Donor Relations or at the request of the president

Development officers can request that such acknowledgements are not executed in special circumstances.

Likewise, development officers can request such acknowledgements are executed in special circumstances.

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## Who Should Know this Policy?

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All university employees engaged in activities related to development and alumni relations are responsible for knowing this policy and familiarizing themselves with its contents and provisions.

## **Definitions**

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This policy has no related definitions

## **Related Documents**

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This policy has no related documents.

## **Contacts**

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The Office of Development and Alumni Relations officially interprets this policy. The Office of Development and Alumni Relations is responsible for obtaining approval for any revisions as required by the policy Creating and Maintaining Policies and Procedures through the appropriate governance structures. Please direct policy questions to the senior director of donor relations.

## **Procedures: Presidential Phone Calls**

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1. Gifts and pledges eligible for a presidential phone call are assigned to the senior director of donor relations and the donor relations associate within RADAR.
2. The donor relations associate reviews the gift details to ensure that the gift meets the appropriate criteria for a presidential phone call. Once the appropriateness is determined, the donor relations associate contacts the development officer linked to the gift.
3. The development officer either recommends a presidential phone call as an effective form of stewardship or requests that a presidential letter be prepared instead. Development officers have 48 hours to respond to a request for information from Donor Relations. If no input is received from a development officer, Donor Relations will decide the best course for proper stewardship. In such circumstances, Donor Relations may move forward with a presidential phone call, substitute the call with a presidential letter or cancel the stewardship action entirely.
4. If the development officer recommends a presidential phone call, the donor relations associate submits a call report request to the assistant director of prospect research. Prospect Research prepares a report within five business days of receiving the case assignment. Prospect Research contacts the applicable development officers for input on gift details and talking points for the call report. If the assistant director of prospect research does not receive feedback from a development officer within five business days, the report will be forwarded as-is to Donor Relations to use at their discretion.
5. Upon receiving the phone call report, the donor relations associate reviews the report and then emails the file to the Office of the President, the senior logistics coordinator and/or the special assistant and president's scheduler, along with a request that the phone call be incorporated into the president's schedule.
6. Once the call is completed by the president, the senior logistics coordinator and/or the special assistant and president's scheduler forwards the president's call report with any relevant notes to the donor relations associate. The donor relations associate enters the phone call as an interaction into RADAR and attaches the phone call report to the record. The case is then closed and stewardship on the gift is completed.
7. A copy of the phone call report is also saved on the Donor Relations shared drive.
8. If the president was unable to speak with the donor when attempting the call, Donor Relations drafts a follow-up letter, referencing the phone call attempt. This letter follows the presidential letters procedure (see below).

## **Procedures: Presidential Letters**

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1. Gifts and pledges eligible for a presidential letter are assigned to the senior director of donor relations and the donor relations associate within RADAR.
2. The donor relations associate reviews the gift details to ensure that the gift meets the appropriate criteria for a presidential letter. If a letter is deemed appropriate, the donor relations associate contacts the development officer linked to the gift.

3. The development officer recommends either a presidential letter be prepared to steward the donor's gift or requests that no presidential stewardship move be employed. Development officers have 48 hours to respond to a request for information from Donor Relations. If no input is received from a development officer, Donor Relations proceeds with a presidential letter.
4. The donor relations associate researches the gift and donor history and drafts a letter.
5. The senior director of donor relations reviews the letter and offers edits.
6. The donor relations associate forwards the draft to the development officer, requesting any further edits and personalization, as appropriate. The development officer has 48 hours to incorporate any desired changes before the letter will be sent as-is to the Office of the President.
7. Upon receiving the DOD-reviewed letter, the donor relations associate reviews the draft and forwards to the President's executive administrative assistant.
8. The Office of the President ensures that the president reviews, signs and mails each letter within three business days. The executive administrative assistant emails a signed, scanned copy of the letter to the donor relations associate.
9. The scanned copy is uploaded to the giving detail of the donor's record within RADAR.
10. A copy of the letter is also saved on the Donor Relations shared drive.

## **Forms**

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This policy has no forms.

## **Revision History**

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This policy supersedes the policy approved in March 2013.

## **FAQ**

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This policy has no FAQ.