Policy on annual giving solicitation

Policy Type: Local
Responsible Office: Office of Development and Alumni Relations
Initial Policy Approved: 01/2013
Revised Policy Approved: 08/2015

Policy Statement and Purpose

The Office of Annual Giving is the central annual giving arm of Virginia Commonwealth University. The mission of the OAG is to broaden the base of support to the university by increasing the number of annual donors and the total dollar amount of annual gifts. Gifts are directed as the donor wishes and can be designated to a specific fund or used for unrestricted, universitywide purposes. OAG solicitations are conducted through multichannel direct marketing efforts.

Annual giving at VCU encompasses all current gifts attributable to annual solicitation efforts. For reporting purposes, the OAG tracks all gifts made to annual fund accounts held at any of the university-affiliated foundations. Gifts are typically less than $25,000, are repeatable in nature and are not payments made on major, pledged commitments. Pledges for annual support are typically fulfilled within one year.

The OAG promotes the VCU brand and raises annual gifts on behalf of the university and schools/units. The OAG is permitted to solicit any alumnus within the university database. The OAG can solicit all alumni on behalf of the university for the Fund for VCU or unit-specific alumni for unit-based annual funds. Additionally, the OAG, in consultation with the vice president of Development and Alumni Relations, will determine when all alumni are solicited for a unit-based designation, for example when a universally interesting opportunity arises or when timing is especially appropriate (building opening, for example). Units must request consideration of such solicitations from the OAG at least 90 days in advance of desired mail date by providing a complete project plan.

The OAG considers the impact of excluding from annual fund solicitations donors flagged as Heritage Society members, MCV Society members, members of all governing and volunteer boards, including the Board of Visitors, and prospects under management. These groups can be included in annual giving solicitations, unless otherwise requested by the director of development for a specific unit and approved by the vice president of Development and Alumni Relations.

If a solicitation from the university or donation from a donor is “bundled” to include an annual gift and an alumni membership, Gifts & Records Management must treat it as two separate transactions, splitting the gift into a membership deposit and a gift deposit and record the two deposits accordingly.

School and units can target specific print and electronic appeals to their constituents during the fiscal year. All appeals, including the solicitation date, must be coordinated and approved by the OAG and executed using RADAR. Units must submit solicitations and related collateral to the OAG at least three weeks before drop date.

Adherence to this policy ensures the preservation of Virginia Commonwealth University’s credibility among its annual donors and the optimization of university resources.

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Who Should Know this Policy?  
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

Annual gift
An annual gift is defined as any charitable current, unrestricted donation made to Virginia Commonwealth University made through a solicitation. Examples of such solicitations are direct mail, phone programs, emails, Web pages, social media appeals, face-to-face visits, individualized annual giving proposals. An unsolicited gift of less than $25,000 also is considered an annual gift. Multiyear, nonbookable pledges are annual gifts.

Bundled solicitation
A solicitation that includes a request for an alumnus to join the alumni association and to make an annual gift.

Direct marketing
A form of brand messaging that allows Virginia Commonwealth University to communicate with its constituents via techniques such as mobile messaging, email, blogs, websites, mail and phone-a-thons. Direct marketing is designed to drive a specific call to action that emphasizes analytical, measureable responses from constituents, regardless of medium.

Finder number
A unique 20 character alpha numeric string that is assigned and printed on every remittance piece associated with a solicitation. The number is specific to a constituent and the appeal it represents.

Fund for VCU
An annual fund account that is the overarching branding mechanism to encourage unrestricted or restricted current-use funds to any entity within the university. The Fund for VCU’s primary function is to raise money where the need is greatest, including for scholarships. Gifts to the Fund for VCU ensure that VCU can provide students with much needed financial aid, up-to-date technology, library resources, career counseling, academic support and more.

Solicitation
Any correspondence that asks for a gift, either through a direct or indirect ask. This can be through a mailer reply card, business reply, courtesy reply, embedded website link, phone call, event registration, QR code, personal ask, etc.

Source code
A string of characters used to track and define the details of a direct marketing solicitation. Source codes are comprised of components that characterize the solicitation, such as the segment, package, timing of solicitation, etc.

Related Documents
- Policy on Ethics
Contacts
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. Direct policy questions to the director of annual giving.

Procedures

1. **Solicitation of annual giving prospects:** All annual giving solicitation efforts targeting Virginia Commonwealth University alumni, parents, friends, faculty, staff or other university-affiliated entities must be submitted for scheduling and coordination through the OAG. This includes appeals for donations and all hard solicitations made via direct marketing or viral marketing, print or electronic.
   a. Complete an online request form, including segments of who will be solicited.
   b. Along with the form, submit to the OAG a sample of the solicitation, including approved content and images, deliverable dates and return mechanism. Form and collateral material must be submitted at least three weeks before the mail drop date. The OAG manages calendar conflicts with various units. DAR Communications reviews for messaging, grammar and identity. Gifts & Records Management reviews for solicitation code compliance.
   c. OAG determines and publishes, on the DAR intranet calendar, the known annual solicitation schedules and strategies for all constituencies.
   d. A unit can solicit alumni or donors from another unit on a case-by-case basis as approved by the vice president of Development and Alumni Relations.

2. **Annual giving appeal approval:** All annual giving solicitations must include the appropriate VCU nomenclature and branding. All requests made to Advancement Services for mailing lists, data files containing names, addresses and/or email addresses of university alumni, parents, friends or other entities for the purposes of solicitation will be honored only after the requestor has received clearance for the direct or indirect appeal from the Office of Annual Giving.

3. **Redesignation of annual gifts:** If a gift falls under the annual giving definition but is a result of a personal relationship or a face-to-face ask, the soliciting director of development must request that Advancement Services change the solicitation field in RADAR to personal ask.

Forms
See the Advancement Services’ Online Request forms at [http://staff.oda.vcu.edu/HelpDesk](http://staff.oda.vcu.edu/HelpDesk).

Revision History
This policy was revised in August 2015, replacing the revisions made in May 2015 and December 2013. The original policy was approved in January 2013.