



**VCU**

# Policy on the phone-a-thon program

**Policy Type:** Local

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

**Initial Policy Approved:** 01/2013

**Revised Policy Approved:** 8/2015

## Policy Statement and Purpose

The Office of Annual Giving (OAG) coordinates and conducts phone-a-thon solicitations (\$10,000 max ask) on behalf of Virginia Commonwealth University, its schools and units. Fundraising phone campaigns, unless approved by OAG, must not be conducted elsewhere on campus or through outside private or volunteer contractors. Schools, colleges and units must coordinate all phone-related solicitations with the OAG to limit redundancy and confusion among prospects. Priority and scheduling is determined by the OAG.

## Table of Contents

Policy Statement and Purpose.....	1
Who Should Know This Policy.....	1
Definitions.....	1
Related Documents.....	3
Contacts.....	3
Procedures.....	3
Forms.....	5
Revision History.....	5
FAQs.....	5

## Who Should Know this Policy?

All University Development and Alumni Relations employees are responsible for knowing this policy and familiarizing themselves with its contents and provisions.

## Definitions

### Annual gift

An annual gift is any charitable current, unrestricted donation made to Virginia Commonwealth University that is typically is associated with an annual giving appeal but not required. These appeals include direct mail, phone programs, emails, web pages, social media, face-to-face visits and individualized annual giving proposals. Unsolicited gifts of less than \$25,000 are also considered annual gifts for reporting purposes. Multiyear, nonbookable pledges are also considered annual gifts.

### Phone-a-thon program

For all purposes at VCU and after July 2012, the phone-a-thon program is referred to as the VCU Gold Line Call Center. The center operates using an outbound model only. Calling typically occurs 6-9:15 p.m. Sunday-Thursday

and 1:45-5 p.m. and 5:30-9 p.m. Sunday. Scheduling is adjusted during certain times of the year to promote specific unit initiatives and to accommodate when students have final exams or are on break.

**Calling criteria**

**All constituents** loaded into the university database of record (RADAR), are eligible to be phoned and solicited for the intent of raising money for the annual fund(s), with the following standard exceptions:

- Managed prospects with significant actions with in the past 90 days
- Cash donors in the current fiscal year
- Constituents with outstanding pledges with payment(s) within the current fiscal year
- Constituents with submitted proposals
- Constituents who are deceased
- Constituents with do-not-solicit/phone attributes

Additionally, constituents who are designated as members of governing boards or identified as prospects under management can be excluded from calling by submitting a written request to the Office of Annual Giving.

**Hierarchy**

Many VCU alumni have two or more degrees and/or fall into additional segments (reunion year, housestaff, former student-athlete, etc.) that could be considered for annual giving solicitations. The chart below outlines the hierarchal structure that determines which segment an alumnus falls into and, thusly, which segment is the default solicitation group. Solicitation by secondary segments can be executed after an annual solicitation from the default segment has been made. Clearly identifying which segment an alumnus is assigned to for each solicitation is vital so the calling script matches the associated solicitation.

ALUMNI HIERARCHY	DEFAULT UNIT
UNDERGRADUATE DEGREE	UNDERGRADUATE DIVISION
GRADUATE / PROFESSIONAL DEGREE	GRADUATE / PROFESSIONAL DIVISION
UNDERGRADUATE & GRADUATE/PROFESSIONAL SAME DIVISION	GRADUATE DIVISION
UNDERGRADUATE & PROFESSIONAL DEGREE DIFFERENT DIVISION	GRADUATE DIVISION
GRADUATE / PROFESSIONAL DEGREE(S)	1ST DEGREE DIVISION
UNDERGRADUATE & CERTIFICATE	UNDERGRADUATE DIVISION
GRADUATE / PROFESSIONAL DEGREE(S) & CERTIFICATE	1ST GRADUATE/PROFESSIONAL DIVISION
UNDERGRADUATE & HOUSESTAFF	UNDERGRADUATE DIVISION
UNDERGRADUATE & REUNION	REUNION YEAR
GRADUATE / PROFESSIONAL DEGREE & HOUSESTAFF	1ST GRADUATE/PROFESSIONAL DIVISION
GRADUATE / PROFESSIONAL DEGREE & REUNION	REUNION YEAR
HOUSESTAFF	SCHOOL OF MEDICINE ANNUAL FUND
REUNION	SOM AF 1 <sup>st</sup> / THEN REUNION GIFT
MULTIDEGREE NONDONORS	FUND FOR VCU
ASSIGNED PROSPECTS	PREFERRED DEGREE

SEGMENTS
LYBUNT
SYBUNT
LAPSED
LONG LAPSED
NONDONORS
REUNION
HOUSESTAFF
MAJOR DONORS
MULTIDEGREE NONDONORS
RPI
MISCELLANEOUS (LIBRARIES, ATHLETICS, HONORS, GEO.)

**Lybunt**

A donor who gave last year but not this year (for example, in 2014 not in 2015).

**Sybunt**

A donor who gave some year in the past (within the past five years) but not this year (for example, in 2010-2014 not in 2015).

**Lapsed**

A donor who gave more than five years ago and not since.

**Long lapsed**

A donor whose last gift was more than 10 years ago.

**Future donor**

Someone who has never made a gift to the university.

**Reunion year**

The year in which an alumnus is recognized for graduating, a year that typically coincides with a graduation anniversary ending in 0 or 5. Some units, however, choose to batch or cluster graduation years for reunion year purposes.

**Housestaff**

Residents in a hospital. These physicians have already earned their medical degrees but must complete a residency in their chosen specialty before they can practice independently. During their residency years, they practice under the supervision of VCU faculty physicians. Residency can last three years (for a family medicine physician, for example) to seven years or more (for surgeons and physicians who subspecialize). The first year of residency is known as the intern year.

**Related Documents**

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- Ethics Policy
- Annual Giving Solicitation Policy

## 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. Direct policy questions to the director of annual giving.

## Procedures

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1. The OAG approves use of the VCU Gold Line Call Center by any school/unit, subject to guidelines and compatibility within the overall fundraising plan.
2. OAG staff is available to work in a consulting role with schools, colleges and units participating in phone-a-thon solicitations.
3. Upon request and when supplies are available, OAG could provide solicitation materials (pledge cards, return envelopes, gift processing forms, etc.) in limited quantities for school/unit campaigns.
4. The OAG manages all data requests for phone-a-thon solicitation lists made to Advancement Services.
5. The OAG provides periodic status reports to the appropriate school/unit along with a detailed year-end analysis for use in suggesting enhancements for future efforts.
6. The OAG determines and disseminates known phone-a-thon solicitation schedules and strategies for all VCU constituencies.
7. The OAG oversees phone-a-thon-related pledge write-offs in a given fiscal year. The following are guidelines pertaining to the write-offs.
  - Annual fund pledge payments can be made online or by mail. Some donors choose to fulfill their pledges at regular intervals over a period of time; others prefer to make one-time pledges. Pledges are considered “due” on the date they are processed in the database of record.
  - Next-day reminders are sent by the vendor.
  - 20, 40, 60 and recurring pledge invoices (monthly, quarterly, semiannually, annually) are sent by the Office of Annual Giving.
  - *Optional:* The OAG submits final e-pledge reminders on behalf of units at the 120-day mark.
  - The following represent the write-off rules as related to nonpayment on one-time and recurring pledges:
    1. Monthly payments – The pledge is written off six months after the last payment was made.
    2. Quarterly payments – The pledge is written off nine months after the last payment was made. A donor has three months to make a payment (since their last payment), then another six months for the normal write-off period.
    3. Semiannual payments – The pledge is written off 12 months after the last payment was made. The donor has six months to make a payment (since their last payment), then six months for the normal write-off period.
    4. Annual payments – The pledge is written off 18 months after the last payment was made. The donor has one year to make a payment (since their last payment), then six months for the normal write-off period.
  - Pledges in excess of \$500 remain on file and can be distributed to the appropriate division at the request of the division’s development officer.
8. Hierarchy
  - The undergraduate and/or preferred degree is the primary or first ask when soliciting by phone as the norm. However, there are segments where alumni with multiple degrees and/or no giving history. They can be solicited for their advanced degree OR unrestricted support to help offset the cost of the phone program.
9. The ask

- During a phone solicitation, callers have access to alumni academic history as well as giving data (if it exists) and are permitted and encouraged to reference this information in an effort to obtain a gift to the university.
  - Supplemental solicitations are permitted to VCU entities or units outside of the alumnus's preferred degree.
10. Credit card gifts
- Callers strive to obtain credit card gifts, the preferred giving method, and process credit card gifts in real time.
  - The vendor receipts these gifts for tax purposes at the point of the initial transaction made over the phone as well as for multipay transactions set up to automatically deduct payments from credit or debit cards.
  - Credit card gifts made in response to a follow-up email or an independent action by a VCU constituent is receipted electronically by VCU's Office of Gifts and Records Management.

### **Forms**

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There are no forms associated with this policy.

### **Revision History**

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

### **FAQs**

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There are no FAQs associated with this policy.