Leadership Donor Acknowledgements

Policy Type: Local
Responsible Office: Office of Development and Alumni Relations
Initial Policy Approved: 03/01/2013
Current Revision Approved: 06/30/2021

Policy Statement and Purpose

The purpose of this policy is to provide clear and consistent guidelines for the leadership acknowledgements to high-level philanthropic supporters of the university. The Office of Donor Relations and Events coordinates executive donor acknowledgment letters and phone calls on behalf of the president of VCU and the vice president of development and alumni relations.

All presidential and vice presidential donor acknowledgements must be approved by the vice president for Development and Alumni Relations, DAR Donor Relations and Events, or their designee. Written and telephone acknowledgements serve as a critical stewardship activity by thanking the donor for their gift in a meaningful way. In accordance with best practices established by CASE and the Donor Bill of Rights, acknowledgements must be coordinated, personalized, detailed and timely. All leadership donor acknowledgements must be correctly recorded in the database of record.

Noncompliance with this policy may result in disciplinary action up to and including termination. VCU supports an environment free from retaliation. Retaliation against any employee who brings forth a good faith concern, asks a clarifying question, or participates in an investigation is prohibited.

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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

Affiliated or institutionally-related foundations
VCU has affiliated philanthropic foundations that are separate 501(c)(3) charitable corporations organized to operate for the support of the university, while operating with self-governed boards and bylaws. They accept and invest gifts made in support of the university.

CASE
The Council for Advancement and Support of Education is a global nonprofit association dedicated to educational advancement — alumni relations, communications, development, marketing and advancement services — and shares the goal of championing education to transform lives and society.

Gift
A charitable contribution for the use of a qualified organization. It is voluntary and is made without receiving, or expecting to receive, anything of equal value in return.

Gift agreement
A formal document between a donor(s) and a VCU-affiliated foundation. Gift agreements outline the specifics of a gift (i.e. amount, pledge period, criteria) and the donor’s intent.

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 executive director of donor relations and events.

Policy Specifics and Procedures

New gifts documented with a gift agreement in the database of record to the university in the amount of $25,000 or more receive consideration for an acknowledgement.

Criteria for presidential recognition

Personal phone call
• New gifts, pledges or documented bequests greater than $100,000 from individuals
- New grants or awards greater than $100,000 from corporations, foundations, and other organizations on a case-by-case basis as recommended by the DAR offices of corporate and foundation relations.

Personalized letter
- New gifts, pledges, documented bequests or pledge completions greater than $50,000 from individuals
- Grants or award payments greater than $100,000 from corporations, foundations, and other organizations
- New gifts, pledges, documented bequests or pledge completions of any size from governing board members, at the discretion of the office of donor relations and events or by special request

In addition, the vice president of development and alumni relations acknowledges new gifts, new pledges and documented bequests from individuals of $25,000 to $49,999 with a personal letter.

Assigned development officers may request an acknowledgement not be executed. Likewise, development officers may request an acknowledgement be prepared for a gift that may not exactly fit the criteria but has special circumstances.

**Procedure for presidential telephone acknowledgements**

1. Gifts and pledges eligible for a presidential phone call are reviewed by the stewardship communications specialist in the acknowledgement report within the database of record. The DAR communications specialist checks the report for new gifts and pledges twice per week.
2. The DAR communications specialist reviews the gift details to ensure that the gift meets the appropriate criteria for a presidential phone call. Once approved, the DAR communications specialist contacts the development officer linked to the gift or the development staff member who is most knowledgeable about the donor and/or gift.
3. Development officers must respond within 48 hours to a request for information from donor relations and events.
4. For presidential phone call acknowledgements, the DAR communications specialist prepares a call report with gift details, donor background and conversation talking points based on information in the database of record and from the development officer. The draft is submitted to the development officer, executive director of donor relations and events and senior associate vice president for development for review and approval.
5. Upon finalization of the phone call report, the DAR communications specialist sends the file to the president’s scheduler at the Office of the President, along with a request that the phone call be incorporated into the president’s schedule and ideally take place within two weeks of the gift date.
6. Once the call is completed by the president, the president’s scheduler forwards the president’s call report with any relevant notes to the DAR communications specialist. The DAR communications specialist enters the phone call as an interaction into the database of record and attaches the phone call report to the record. Notes that require action or follow-up, such as “we spoke about having lunch in the next few weeks,” will be relayed to the appropriate staff member.
7. If the president was unable to speak with the donor when attempting the call, he is asked to leave a voicemail. Donor Relations and Events may choose to draft a follow-up letter,
referencing the phone call attempt. If the president was able to speak with the donor and if it is deemed as an acceptable extra stewardship effort, the stewardship communications specialist may draft a follow-up letter thanking the donor for taking the call. These letters follow the presidential letters procedure.

**Procedure for Presidential and Vice Presidential Letters**

1. Gifts and pledges eligible for a presidential or vice presidential letter are reviewed by the DAR communications specialist in the acknowledgement report within the database of record. The DAR communications specialist checks the report for new gifts and pledges twice per week.

2. The DAR communications specialist reviews the gift details to ensure that the gift meets the appropriate criteria for a presidential or vice presidential letter. Once the appropriateness is determined, the DAR communications specialist contacts the development officer linked to the gift or the development staff member who is most knowledgeable about the donor and/or gift.

3. Development officers must respond within 48 hours to a request for information from Donor Relations and Events. If no input is received from a development officer, Donor Relations and Events proceeds with preparing a letter.

4. The DAR communications specialist drafts a letter after researching the gift and donor history as well as gathering information from the development officer.

5. The development officer reviews the draft and offers edits and/or suggestions. The development officer has 48 hours to offer input. If no input is received from the development officer, it is assumed that he or she has no further input on the draft.

6. Once the draft is approved, DAR donor relations staff the letter and offer edits and/or suggestions.

7. When a presidential letter is finalized, the DAR communications specialist forwards the document to the President’s executive administrative assistant. When a vice presidential letter is finalized, the DAR communications specialist forwards the document to the vice president of development and alumni relations’ special assistant.

8. The executive administrative assistant or the special assistant reviews the letter, gets the president or vice president’s signature (either live or using autopen technology) and mails the letter to the donor within three business days. The assistants email a signed, scanned copy of the letter to the DAR communications specialist. The DAR communications specialist must enter the stewardship effort as an interaction into the database of record, attaching a copy of the letter to the record.

9. Tracking will measure average turn-around from date of gift to acknowledgement, with the optimal goal of 10 business days.

**Forms**

There are no forms associated with this policy and procedures.

**Related Documents**

1. Development and Alumni Relations Activities
2. Relationships with University Related Foundations
Revision History

This policy supersedes the following archived policies:

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<th>Approval/Revision Date</th>
<th>Title</th>
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<tbody>
<tr>
<td>March 2013</td>
<td>Policy on presidential acknowledgements</td>
</tr>
<tr>
<td>July 2015 revision</td>
<td>Policy on presidential acknowledgements</td>
</tr>
<tr>
<td>January 2021 revision</td>
<td>Policy on presidential acknowledgements</td>
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</tbody>
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FAQ

There are no FAQ associated with this policy and procedures.