



# Policy on correspondence and solicitation codes

**Policy Type:** Local

**Responsible Office:** Development and Alumni Relations

**Initial Policy Approved:** 5/2009

**Current Revision Approved:** 12/2012

## Policy Statement and Purpose

All communications sent to alumni, donors or other constituents tracked in the university’s alumni and donor database of record, Millennium, must use correspondence and solicitation codes assigned by Advancement Services through its online Help Desk system. Every correspondence requires a new correspondence code and solicitation code.

A correspondence code is used for a single communication.

A solicitation code must be tied to every correspondence, even if there is no hard ask. If the correspondence is a hard ask, then it will be categorized as a solicitation for reporting purposes.

The purpose of this policy is to ensure that all communications with donors, alumni and other constituents are recorded correctly in Millennium. Correspondence codes allow for the tracking of all messages sent to constituents. Solicitation codes allow for tracking of which communications directly resulted in gifts to the university or a university-affiliated foundation. Both of these fields can be used in reporting to determine the frequency and effectiveness of communication and solicitation efforts.

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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 ---

### Correspondence

Any interaction with a constituent that does not directly relate to one-on-one discovery, cultivation, solicitation or stewardship, most often accomplished through mail, email or phone, usually through bulk, impersonal methods. One-on-one personal interactions with major gift prospects should be entered on the Action screen in Millennium.

### Solicitation

Any correspondence that solicits a gift, either through a hard or soft ask. This can be accomplished through a mailer reply card, business reply envelope imbedded website link, phone call, event registration, personal ask, etc.

### Hard ask

A correspondence with the primary intention of soliciting a gift from the recipient. These will most often include a mailer reply card as well as a business reply envelope.

### Soft ask

A correspondence with the primary intention of disseminating information to the recipient. Recipients can be directed to a website or giving form in the body of the message, but there is no mailer reply card or BRE. Examples include magazines, newsletters, event emails/invitations and general communications.

## Related Documents ---

- Advancement Services Request for Services Policy
- Disciplinary Policy

## 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. Please direct policy questions to the Advancement Services IT Manager or the AVP of Advancement Operations.

## Procedures ---

1. A correspondence code and recipient list are requested through a Help Desk ticket in conjunction with a report or Online Services project request. (<http://staff.oda.vcu.edu/HelpDesk/>)
2. A new correspondence code and a new solicitation code are created (a solicitation code is created for every correspondence code). A new solicitation code must be created for every solicitation. This allows for the tracking of the ROI and effectiveness of that unique solicitation.
3. The correspondence code is created and added into the Millennium record for each recipient.
  - a. For direct mail, this is created when the list is sent to the requestor unless there is a request to proof the list and changes are made before finalizing. In that case, the list, including Millennium IDs, must be returned to Advancement Services so the correspondence code can be added.
  - b. For emails deployed by Advancement Services, the correspondence code is inserted after the email is sent. The email response (open rate, click rate, etc) appears on correspondence records for all recipients. If emails are not deployed by Advancement Services, the email response is not recorded.
4. As gifts are received, the solicitation code is marked on the gift record. That solicitation code is linked to a specific correspondence. By creating separate solicitation codes for each correspondence, each gift will be linked to a specific correspondence.
  - a. For direct mail:
    - i. The solicitation code must be printed on the return piece, embedded in the Internet link or published in the drop-down list on the online giving form. The solicitation code is

loaded onto the gift screen in Millennium when a gift is received in response to that solicitation.

- ii. Once the solicitation code is created, a proof of the return piece, including the solicitation code, must be approved by Gifts & Records Management. This approval is needed before the piece is printed to make sure that all information is in the correct place, ensuring that all gifts from the solicitation are recorded properly in Millennium.
- b. For online forms:
- i. The solicitation code is embedded in the URL link to the form. A custom URL (for example [www.support.vcu.edu/mycampaign](http://www.support.vcu.edu/mycampaign)) can be created for direct mail campaigns that link to new or existing online giving forms. For email campaigns, an existing form can be linked to with the solicitation code appended ([support.vcu.edu/give/givingform/solicitationcode](http://support.vcu.edu/give/givingform/solicitationcode)). Submit a Help Desk ticket to have a solicitation code and URL created.
  - ii. For forms when a solicitation code is *not* specified, a "How did you hear about us?" section will be displayed to donors who can select from a list of options. If "A recent direct mail" is selected, then the solicitation code of the most recent direct mail piece sent to the donor will determine the solicitation code.

## Forms

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See the Advancement Services Online Request forms at <http://staff.oda.vcu.edu/HelpDesk>.

## Revision History

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This policy supersedes the following BOV policy approved in May 2009:

- 9.1.5 Advancement Services Correspondence and Solicitation Code policy

## FAQs

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This policy has no FAQs.