



## Annual Giving Policy

Area: University Advancement	Number:
Subject: Annual Giving Policy	Issued:
Applies To: University Community	Revised: 5/29/2012
Sources:	Updated:
Responsible Party: Vice President for University Advancement	Page(s): Page 1 of 4

### **I. Purpose**

Unrestricted current use gifts to the annual fund provide essential budget relief to the University's general purpose budget and to participating colleges and units.

### **II. Policy Statement**

Unrestricted current use gifts to the annual fund provide essential budget relief to the University's general purpose budget and to participating colleges and units.

To most effectively serve our alumni, parents and friends, maximize financial return and minimize costs, the responsibility for annual solicitation lies with the Office of Annual Giving, within University Advancement. The Office of Annual Giving has been charged specifically with the responsibility of raising unrestricted current use gifts for the University and its colleges/units supported through the Georgia Southern University Foundation

The Office of Annual Giving is charged with soliciting all graduates of the University and parents for support. The Office of Annual Giving provides the support for solicitation of "friends" of the university as well as opportunities arise.

Dual degree holders, who have both their undergraduate degree and their graduate degree from Georgia Southern are solicited for annual unrestricted funds for each program.

Any personal solicitation program with alumni or non-alumni parents should be coordinated with the Office of Annual Giving and Major Gifts. There are many instances where assistance can be provided, yielding better results for all parties involved.

### **III. Exclusions (if applicable)**

The Vice President of University Advancement must approve any deviation from this policy.

**IV. Procedures**

**Policy on broad-base campaign solicitation by programs other than the Office of Annual Giving**

From time to time in an approved college or unit, a broad-based direct mail or e-mail appeal may be deemed appropriate for a fundraising effort. In order to protect the University’s ability to raise unrestricted current use gifts, the following guidelines are in place:

Overall Policy:	Direct mail or e-mail solicitation date must be coordinated with the Office of Annual Giving and approved by the Director of Annual Giving.
Purpose:	For an approved institutional fundraising priority.
Solicitation Message:	Encourage an <i>additional</i> gift to Georgia Southern in support of XXX . Solicitation should recognize any support the donor may already have given during the year.
Pledge Card:	The pledge card, since it is for a restricted solicitation, must look distinct from Georgia Southern’s Annual Giving materials. The pledge card must be reviewed and approved by Advancement Services, Foundation Accounting and the Director of Annual Giving prior to production. Pledge cards must display a correct campaign initiative code and appeal code, and must be printed showing the donor’s ID and name.
Reply Envelope:	All direct mail solicitations must use a reply envelope directing returned gifts to the Foundation, PO Box 8053-02, Statesboro, GA 30460.
Mailing audience:	The mailing audience must exclude individuals who have requested not to be solicited by Georgia Southern. The solicitation of any prospect who is identified as a Major Gifts prospect must be cleared for solicitation before the solicitation occurs. Banner is the database of record and should be used for all list creation.
Budget:	The budget for such activities must be determined ahead of time, preferably part of an annual plan coming from either a campaign budget or program budget. The Office of Annual Giving does not have supplemental budgetary resources for additional solicitations.

**Annual Giving Solicitation of Tracked Prospects**

All major gift prospects will be reviewed on an annual basis by IT Services and Development Officers with clearance being given for these individuals to be contacted by Annual Giving staff or receive Annual Giving solicitation mailings. Because we encourage the University’s most generous supporters to provide annual support in addition to special campaign gifts, we encourage Annual Giving solicitations in all but rare occasions.

Unless specifically coded “do not solicit” by Advancement Services, all other tracked prospects will receive communication from the Office of Annual Giving until a donor makes a gift. If the individual is assigned to a particular College or Unit for solicitation in any given year, that program area is welcome to solicit through whatever additional vehicles and methods they deem appropriate for that prospect.

### **Use of Phonathon facilities by programs outside of the Office of Annual Giving**

The Office of Annual Giving phonathon facilities are not available for use for restricted group phonathons, as they are in full use for raising unrestricted support for the University and its Colleges. Specific exceptions may be made at the discretion of the leadership of University Advancement.

### **Supplemental Activities by programs outside of the Office of Annual Giving**

#### *Dean's/Director's Letters:*

Many Deans and directors produce what are known as "Dean's/Director's Letters" at various times throughout the year. These letters are primarily stewardship letters to alumni of their college/unit. They should **not** be primarily solicitation letters, but may contain an annual giving message describing the importance of unrestricted gifts for that college or unit. Any such giving message should state the importance of unrestricted gifts to both the college/unit and to the University.

#### *Newsletters:*

Articles about unrestricted giving, The Foundation and various other annual giving mechanisms frequently appear in college and unit newsletters mailed or emailed to alumni throughout the year. These articles should comply with the general Office of Annual Giving Policy guidelines that any message regarding unrestricted support states the importance to giving to both that area and the general university fund.

#### *E-mail:*

E-mail solicitations are regarded as the same as direct mail solicitations, and the same policies apply. For security reasons, all email solicitations should be coordinated through the Office of Annual Giving. Additionally, all on-line giving should be done through the official Foundation giving pages.

#### *Alumni Networks and Eagle Clubs:*

Direct mail or e-mail solicitations from or to Alumni Networks and Eagle Clubs should be coordinated between the Alumni Relations and Annual Giving staffs.

#### *College Membership Programs:*

Several colleges and units have membership programs that solicit contributions. Membership solicitations and renewals for these programs should be coordinated with the Office of Annual Giving to ensure a proper fit on master calendar.

### **Annual Giving Solicitation Vehicles and Schedules:**

#### *Direct mail solicitations:*

Alumni: two to three mailings per year (generally in September, December and/or May) to donors with a giving history in the last ten years. Specific college alumni: One mailing per year (generally in the spring) to all degree holders within the respective colleges. Parents: one to two mailings per year to all current parents, and past parents who are previous donors.

#### *Phoning:*

Year-round calling. The focus in the fall is alumni, with a favorable annual fund giving ranking, for unrestricted funds. Pools will consist of alumni and friends. Donors to this unrestricted campaign will be contacted again in the spring with a solicitation on behalf of the college from which they graduated. Those who have responded to other solicitation vehicles for each segment will be pulled from the pool. Parents cleared for student phoning will also be called. Other special calling projects may be taken on at the discretion of the Director of Annual Giving with the cost to the specific unit. Specific schedules will be at the discretion of the Phonathon Coordinator.

*Personal solicitations:*

Many gifts from \$1,200 to \$24,999 may be secured through personal solicitation assignments given to the Alumni Relations and Annual Giving staff, select volunteers and Major Gift Officers where appropriate. These solicitations will be tracked prospects who have been reviewed and approved for personal solicitation through Annual Giving.

*Parent's Association:* Responsibility for the Parent's Association lies with student affairs and enrollment management with the exception of phoning. Phonathon will solicit all parents of students for unrestricted annual gifts.

*e-mail solicitation:*

Alumni: five to seven solicitation messages a year to all alumni with good e-mail addresses who are solicitable via e-mail. Specific college alumni: two to three solicitations a year to all alumni with good e-mail addresses who are solicitable via e-mail.