Annual and Special Giving

Policy Statement

The policies and procedures set forth in this document are intended to assist and guide the activities of Adelphi University personnel who are involved in annual and special giving to Adelphi.

Reason for Policy

These policies and procedures are intended to provide a standardized and consistent approach to the Adelphi University’s solicitation and acceptance of annual and special gifts that protects our good relationships with the many alumni, friends, corporations, foundations, and others who benefit Adelphi through their philanthropy.

It also insures that the receipt of gifts advances the Adelphi University’s mission and is done in accordance with applicable local, state, and federal statutes. The guidelines are designed with sufficient flexibility to accommodate complex or unpredictable gift situations and donor expectations within the constraint of consistency with the Adelphi University’s mission and policies.

Who is Governed by this Policy

Staff

Policy

I. General

The Office of the Vice President of University Advancement’s Annual Giving efforts (AG) coordinate annual fund solicitations on behalf of Adelphi, its schools, colleges, and other units. Adelphi defines annual giving as all current gifts less than
$25,000. Annual Giving solicitations are generally conducted through direct marketing (mail, phone, e-mail, crowdfunding, online giving, text-to-donate and direct asks). Annual Giving Adelphi Fund gifts are designated by the donor for a specific fund or for unrestricted purposes. In order to provide the most effective program with both personnel and operating resources, the following policies apply:

II. **Phoneathons**

1. AG will conduct all phone campaigns on behalf of the schools, colleges, special units, and the general University. Priority and scheduling will be determined by AG.
2. Fundraising phone campaigns, unless approved by AG, will not be conducted elsewhere on campus or through outside private or volunteer contractors.

III. **Direct Mail**

1. AG will coordinate all direct mail solicitations.
2. AG will coordinate all school, college, athletic and program, including giving societies such as the Women’s Giving Circle fundraising solicitations through to limit redundancy and confusion among prospects. AG will advise on aspects of solicitation including copy writing, script development, layout, design, paper, printing, timing, adherence to postal regulations, and other university standards.
3. All appeals must be in-brand and cleared by the Office of University Communications and Marketing before being sent out.
   a. AG will charge all costs incurred on behalf of a school, college, or unit to those parties. Statements of these charges will be sent to the appropriate fund administrators.
   b. Schools, colleges, and units will direct all data requests for solicitations lists to AG.
   c. AG will evaluate all known direct marketing solicitations for effectiveness, efficiency and overall quality. Periodic status reports will be provided to the appropriate school, college, athletics or program along with a detailed year-end analysis for use in suggesting enhancements for future efforts.

4. The Office of the Vice President of University Advancement determines and publishes the known annual solicitation schedules and strategies for all constituencies and reviews with the President and the Advancement and Alumni Relations Committee of the Board of Trustees.

IV. **Reunion Giving**

Reunion gifts support Annual Giving. Reunion giving contributions power student life and learning at Adelphi, helping to maintain and enhance the Adelphi experience with scholarships, graduate fellowships, library resources and a
range of other initiatives. Alumni celebrating milestone reunion years are solicited in a targeted and strategic manner.

V. **Annual Day of Giving**

Every year, Adelphi hosts an Annual Day of Giving in which there is an online presence as well as campus events promoting giving targeted at student, employees and alumni.

VI. **External Vendors**

The AG currently uses two vendors to assist in yearly giving;

Direct Mail vendor - Royall & Company
Phonathon and crowd funding Vendor – Ruffalo, Noel Levitz.

VII. **Assignment of Portfolios**

Annual Giving is charged with developing strategies to support the dollar and alumni participation annual giving goals. The staff of the office will focus on identifying, cultivating and soliciting key leadership annual gifts with a focus on gifts of $1,000-$24,999. The staff will also qualify individuals to continue to deepen Adelphi’s prospect pool. Each staff member will carry a portfolio of leadership gift prospects ranging in size from 50-100. AG will exceed 200 face-to-face visits annually. Maintain a precise record of donor contacts through the prospect management system and prepare timely call reports. Each staff member will make 100+ contacts per week to ensure Adelphi reaches higher levels of alumni participation rates each year.

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**Definitions**

This policy does not have definitions associated with it at this time. Upon periodic policy review this area will be evaluated to determine if additional information is needed to supplement the policy.

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**Forms**

This policy does not have forms associated with it at this time. Upon periodic policy review this area will be evaluated to determine if additional information is needed to supplement the policy.

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**Related Information**
This policy does not have related information at this time. Upon periodic policy review this area will be evaluated to determine if additional information is needed to supplement the policy.

Policy Owner

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Secondary Contacts

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Document History

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Who Approved This Policy

Brady Crook, VP for University Advancement

Tags

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