Gift Announcement

Policy Statement

The Office of the Vice President of University Advancement works in cooperation with the Office of University Communications and Marketing and the Office of the President to officially publicize gifts in ways that are consistent with best practices and effective positioning of the University among external audiences. Adelphi’s gift announcement protocol considers the needs of the University, the wishes of the donor, the interests of various audiences, and the standards and practices of the news media.

To assure the accuracy and completeness of news that is released regarding gifts — both internally and externally — the University documents and records gifts fully and in compliance with the University’s gift acceptance policy prior to the release of any information about a gift. The guidelines in this policy apply to release of any information about a gift that might appear on University websites and in print publications, email messages and newsletters, speeches, presentations, social media, and other communication vehicles employed by University colleges, schools, units, programs, departments and offices.

Reason for Policy

Gifts to Adelphi University reflect confidence in the University and a commitment to its future. Support and investment in the University is often cause for public celebration and the University works in partnership with donors to announce their gifts.

Many members of the Adelphi community will be partners in securing investments, and this policy contains guidelines to ensure that all members of the University community understand the process for official gift recognition. Ensuring that gift announcements follow these guidelines safeguards donor relations, and promotes appropriate and effective recognition of gifts, which is essential to the University’s success.
Effective gift announcements publicize an important University priority and communicate directly to key constituencies while respecting a donor’s desire for recognition. Such announcements ensure the appropriate recognition of generosity to the University in order to pay homage to our donors, draw attention to the University’s achievements, highlight specific programs, and set an example to inspire others.

Who is Governed by this Policy

Staff

Policy

A. Categories of Gifts

This policy is intended to apply to all charitable gifts and grants donated to Adelphi University and accepted under the guidelines outlined in the University’s Gift Acceptance Policy. A "donor" shall be defined as any individual, partnership, corporation, foundation or other legal entity that makes a charitable gift to the University, regardless of amount or type of gift. This policy pertains to three types of gifts:

1. Private Gifts
   Refers to present and future gifts for use by the University, with emphasis on contributions by individuals. A present gift is one made outright and immediately available for use by Adelphi University. Present gifts may also be pledged to be paid over a period of up to five years. Future gifts — for example, bequest expectancies, charitable remainder trusts and charitable gift annuities — mature to benefit the University at a later date.

2. Private Grants
   Refers to contributions from a non governmental, non-profit organization with its funds and program managed by its own trustees or directors. Frequently such donations will be referred to as having been directed to the University via family foundation, donor-advised fund, or community foundation from an alumnus, parent or trustee of the University.

3. Foundation Grants
   Refers to contributions from corporate foundations and private foundations with a formalized administrative/staff structure, and foundations that make awards primarily through a competitive grants process. This policy does not apply to contracts in which the sponsor receives something of material value in return for giving something
that the parties perceive to be of equitable value — a quid pro quo arrangement. Such dealings are not charitable gifts or grants. Academic grants awarded by state or federal sources also are exempt from this policy.

B. Announcement Types

This policy outlines guidelines for two types of gift announcements, those focused on informing public audiences beyond the Adelphi University community about gifts to Adelphi, and internal announcements intended for the University community.

1. Public Announcements
   Public announcements include news published in print or online, or distributed electronically, and shared in any combination of the following ways:

   a. As part of the University's web and social media presence via the Adelphi News online newsroom, the University's homepage news feed, and Facebook, Twitter and other social media platforms.
   b. As press releases or news advisories conveyed to the news media (this also may include news shared during press conferences for major gifts).
   c. Published in the Adelphi University magazine.
   d. Via newsletter, including the Insider, From My Desk, etc.
   e. In email sent to external constituencies including alumni, parents, and friends of the University, education advocates and others outside the campus community.
   f. In marketing materials, including brochures, postcards, recruitment publications and donor reports.

2. Internal Announcements
   Internal announcements include dissemination of gift news to internal stakeholders and members of the University community, including faculty, professional staff, students and trustees. Dissemination of this news typically is via email, but also may include in-person gatherings and other meetings not open to the general public.

C. Authorizing a Gift Announcement

The Office of the Vice President of University Advancement has final authority and responsibility for determining the official announcement of gifts to Adelphi University, and the Associate Vice President for Brand Strategy and University Communications has responsibility for all aspects of externally facing communications, including content, accuracy, timeliness, completeness and professionalism.
1. The decision to announce a gift, whether public or internal, should be approved in principle by the Vice President of University Advancement or his or her designee.

2. Any gift announcement, whether public or internal, shall be made only with the permission of the donor, sought through the Office the Vice President of University Advancement, to publicize the gift according to University policy. Requests for anonymity must always be respected.

3. Consistent with the University's gift-acceptance policy, before any gift is announced publicly or internally, it must be recognized officially as a gift or pledge by the University and must be entered appropriately into the University's gift records system.

4. Announcements may not be made via Adelphi departmental websites, newsletters, email, social networks or microblogs, or by outside sites and newsletters until the University itself has officially announced the gift, or the Vice President of university advancement has given permission.

D. Announcing Gifts

1. To the Public

   a. Public gift announcements generally will be made by the President of the University, but other officers may be asked to serve as spokespersons when appropriate. The donor, relevant faculty members, alumni and/or students may be invited to provide comments to be incorporated into a news story, testimonial or press release.

   b. In general, only gifts of $1 million or more will be announced publicly. Public announcements may be made of gifts of less than $1 million at the request of the President or if the Vice President of University Advancement believes the gift is likely to attract media interest because of its unusual or local source, nature or circumstances, or because it funds innovative programs or facilities that may in themselves be newsworthy.

   c. Gifts of any amount that bring lifetime giving from a specified donor to a "milestone" level, i.e. >$1 million, >$5 million, or >$10 million, may also be announced publicly, as should inaugural benefactions from sources representing potentially important new relationships between the University and gift-provider/partners.

   d. In certain cases, gift announcements may include notice of multiple gifts in a single announcement, particularly if the contributions support a common area or project.

   e. Public announcement of a gift must include the amount of the gift, even when the donor remains anonymous.

   f. The Office of University Communications and Marketing will endeavor to interest the news media in any gift that might be regarded by media outlets as newsworthy. (Gifts are most likely to attract media interest if they are large in size, generally $1 million
or more, or if they are associated with new or innovative programs or facilities.)

g. In general, if Adelphi has previously announced a $1 million+ gift from a donor, that gift should be mentioned in an announcement about a new gift from the same donor. If Adelphi has previously announced a gift in the $500,000 to $1 million range, it may be appropriate to mention that gift in an announcement of a new gift from the same donor.

2. **To internal audiences**

   Consideration will be given to the internal announcement of gifts of less than $1 million that are of particular interest to the University community. Procedures for internal gift announcements will be consistent with the practices used in preparing announcement circulation.

3. **When Making an Announcement**

   a. The Office of the Vice President of University Announcement will notify the Office of University Communications and Marketing and the Office of the President of pending gifts for announcement. The Development Writer, anticipating a gift announcement, will confer with the Associate Director of Project and Administrative Operations to confirm that a gift should receive publicity — public or internal. If the gift should, then the Office of University Communications and Marketing will be notified.

   b. The Donor Relations Specialist will provide an analysis and consult with the appropriate member(s) of the advancement staff should any complications in the gift agreement or in Adelphi’s ability to announce the gift be identified.

   c. The assigned gift officer notify the donor of the University's desire to publicize the gift and seek heir consent to that publicity.

4. **If consent granted for public announcement:**

   a. The appropriate members of the Office of University Communications and Marketing staff will work in consultation with Office of the Vice President of University Advancement to prepare any public gift announcement.

   b. The responsible gift officer will advise the donor that an Office of University Communications and Marketing representative will be in touch to discuss the gift announcement, seek the donor's insights about the impact of the gift, and develop suitable comments to be included in the announcement. (A quote from the donor is optional, and an announcement may be issued without one if the donor has no objections to the release of other information about the gift.)
c. The Office of University Communications and Marketing will oversee the public announcement draft, including any quotes, and will guide it through the internal review process.
d. If substantive changes are made to the draft document at any stage, the Office of University Communications and Marketing also shall see that the appropriate parties are asked to provide additional review and consent. The writer shall not send the announcement to the donor for review until it has been reviewed and approved by the Office of the Vice President of University Advancement and the Office of the President.
e. The Development Writer who has been in touch with the donor during the announcement development process, with approval from the Vice President of University Advancement, will send the draft to the donor for approval.
f. The Vice President of University Advancement in coordination, with the Associate Vice President for Brand Strategy and University Communications and the Executive Assistant to the President, will discuss any significant changes proposed by the donor. Final decisions about the content and timing of the announcement will respect the wishes of a donor who asks to remain anonymous or who prefers not to be quoted, but who has no objections to the release of other information about the gift.
g. To ensure alignment with any public announcement, the Office of University Communications and Marketing (deferring to the wishes of the Office of the President) will coordinate an internal announcement by email to the campus community. Generally, this announcement will be made prior to any public announcement, although the Office of University Communications and Marketing may allow for contemporaneous posting to the University website and distribution to news outlets, including the donor’s hometown newspaper. No announcement of a gift will occur until the steps outlined above have been completed.
h. The Office of University Communications and Marketing will coordinate the announcement in selected news media and in official Adelphi media (Adelphi News on the University's website, The Insider, From My Desk, the Adelphi magazine, etc.), and Adelphi students may choose to run a story about the gift in the student newspaper, The Delphian.

5. **If consent granted for internal announcement only:**

1. Internal gift announcements generally will be made by the Office of the President in cases in which it is determine that a gift is of interest to the University community or internal stakeholders.
2. The Executive Assistant to the President will shepherd email announcements from the President, while the Development Writer will work with the appropriate gift officer to shepherd
announcement emails from the Office of the Vice President of University Advancement to the donor. In both cases, the appropriate gift officer should advise if the donor requires review of the internal announcement.

**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.

**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.

**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**

*This section should include the name, phone number and email address of one or more individuals who can answer questions about the policy.*

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Document History

This section must contain the following dates or placeholders for future dates:

- Last Reviewed Date: 12.30.17
- Last Revised Date: 12.30.17
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Who Approved This Policy

Brady Crook, Vice President, University Advancement

Tags

Advancement, Staff