Fund-Raising Policy

Approved on: 11/07/2007
By: Administrative Council
Effective date: 11/28/2007

Brief Policy Summary (1-2 sentences that describe policy)

The purpose of this policy is to establish a framework for action and to define roles and responsibilities in fund raising.

Applicability/Eligibility

This policy applies to the entire university.

Administration of Policy

Mandating Authority: University System of Georgia Board of Regents

Responsible Office(s): Office of the Vice President for Development

Responsible Executive(s): Vice President for Development

Contact(s)
(Position Title, Campus Location, Phone Number or Email Address)

Vice President for Development, 324 Alumni Hall, Ext. 3-3405

Web Links -- Procedures
    None at this time.

Forms
    To be determined.

Full Policy Text {Mandatory}

I.   Initiatives. Campaigns and other fund-raising initiatives are important ways of concentrating energy and resources on strategic objectives of the university. The president has final approval authority over all fund-raising initiatives. The chief development officer, in consultation with deans and unit heads, is responsible for ensuring that all fund-raising activities are integrated into a unified plan.

II. Donors and prospects. Taking a donor centered approach, the university's objective is to solicit each donor for maximum giving to support the programs for which the donor has the greatest affinity and which meet the strategic goals of the institution. The chief development officer is responsible for developing prospect management procedures, which include rules and regulations for prospect assignment and solicitation clearance. Units with competing claims on prospects will be afforded the opportunity to submit to the chief development officer justifications for assignments.

III. Personnel. Forming and sustaining a skilled professional staff is essential to an effective fund-raising program. The Development Division is responsible for a professional development program for all development personnel. Regardless of reporting relationships, the chief development officer or his or her designee is also consulted in all development officer personnel decisions (including creating and reclassifying positions and hiring, evaluating, promoting, retaining, and terminating personnel.)

IV. Ethics. As in all its undertakings, the university recognizes the need for high ethical standards in fund raising. The chief development officer is responsible for promulgating and enforcing ethical standards for all those engaged in fund-raising activities.

V.   Confidentiality. The university and its cooperative organizations gather confidential and sensitive information on donors and prospective donors. This information is used to formulate fund-raising strategies that are most appropriate for each donor. The Development Division is responsible for putting into place procedures for defining the scope of information collection and distribution and for protecting the confidentiality of the information to the extent permitted by law.

VI. The Georgia State University Foundation. The Georgia State University Foundation is the primary destination for all gifts to the university except when agreements and conditions dictate otherwise.

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87	VII.	<u>Consultants</u>. Fund-raising consultants can add value to the fund-
88		raising operation by bringing state-of-the-art information and best
89		practices to the university. The chief development officer, in
90		coordination with the colleges and other units, may engage
91		consultants for special projects. The Development Division is
92		responsible for coordinating all consulting engagements.
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94	VIII.	<u>Named gift opportunities</u>. The naming of facilities and endowments
95		represent important recognition opportunities in the development
96		process. As directed by the president, the chief development officer is
97		the chair of the naming committee and shall be responsible for
98		compliance with university and Board of Regents policies and
99		procedures regarding naming and the removing of names from
100		facilities and endowments.
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102	IX.	<u>Procedures</u>. The chief development officer shall have the authority to
103		issue procedures to implement this policy.
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105 **Rationale or Purpose** {Mandatory}

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107 The purpose of this policy is to establish a framework for action and to
108 define roles and responsibilities in fund raising. The development (fund-
109 raising) function falls within the purview of the president of the university
110 under authority granted by the Board of Regents (BOR policy 204) to the
111 president, who is the "executive head" of the institution. The president
112 has authorized the establishment and promotion of a comprehensive and
113 integrated fund-raising program for the university (including all its units)
114 and its cooperative organizations. The president has delegated day-to-
115 day management of the fund-raising program to the vice president for
116 development and designates him or her as the chief development officer
117 of the university. This policy acknowledges that deans and other senior
118 administrators have important roles in fund raising consistent with the
119 expectations for their positions.

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121 **Exceptions** {If needed}

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123 Where legal or compliance imperatives demand an immediate modification
124 (or suspension) of policy (and practice), an interim policy (and or
125 procedures) will be developed and enacted, pending formal review and
126 approval.

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128 **Policy History** {Mandatory}
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130   This policy supersedes a policy adopted in 1988.
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132 **Cross References** {If needed}
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134   This policy is cross referenced in the Georgia State University Foundation
135   policy manual as number 10.1.
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137 **Definitions** {If needed}
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139   Definitions are contained within the Full Policy Text.
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141 **Additional Information** {If needed}
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143   None at this time.
144
145 **Additional Helpful Resources**
146
147   None at this time.
148
149 **Category:** [This information will be supplied by the Office of
150 Institutional Effectiveness.]
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153 **Index Words** {mandatory}
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155   Development, fund raising, consultants, gifts, naming places, Georgia
156   State University Foundation, cooperative organizations, donors