Procedure number/name: 2.1a Annual Programs Counting and Reporting Procedure

Issuing date: ______________________ Effective date: 7/1/2008 ______________

Related policy number/name: 2.1 Gift Acceptance Policy Title I, Principles and Definitions

Procedures Approved by: President of foundation/vice president for development

I. Introduction
The Gift Acceptance Policy, Title I, Principles and Definitions authorizes counting and reporting rules based on the provisions of the policy. This procedure addresses counting and reporting for Annual Programs.

II. Revision history

III. Definitions
Annual Program is the principal way of generating gifts for operating support of the university and reaching donors below the special/major gifts level. Solicitations are conducted by telephone outreach, direct mail, internet/e-mail and – on a limited basis – personal solicitation. Annual Programs adds strategic value to the total development effort by broadening the donor base and advancing donors to higher levels of giving.

IV. Persons affected
Primarily Annual Programs staff. Secondarily all Development staff.

V. Roles and responsibilities
The senior director, Annual Programs and Annual Programs staff as he or she may designate are responsible for administering this procedure. The senior director, Annual Programs shall annually review this procedure and make recommendations, if any, for improving the procedure.

VI. Procedures
The effectiveness of Annual Programs will be evaluated by measures of funds raised and new gifts and pledge payments generated by solicitations originating
from Annual Programs. Annual Programs will assign appeal codes and/or other Raiser’s Edge codes to its solicitations. Annual Programs will generate reports for the Development Division management team (the vice president and the assistant/associate vice presidents for development).

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<td>Position Title</td>
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<td>Senior director, Annual Programs</td>
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Additional information and resources

None at this time.