

POLICIES ON FUNDRAISING ACTIVITIES

Advancement

Development – Alumni Relations –College/Community Relations

REQUESTS, PROSPECTS & GIFTS FOR UNION

A unified approach to typical procedures for solicitations, processing gifts, and thanking donors to the College

Prior Written Approvals Required: All faculty and staff are required to gain approval from the Advancement Office prior to the implementation of any fundraising plans or solicitations of any individuals, corporations, area businesses, or foundations. In addition, all faculty and staff are required to obtain approval of fundraising projects from their appropriate department chair, or area supervisor before approaching the Advancement Office for assistance or approval.

This screening process will help us avoid potential problems with multiple and overlapping requests to the same individual or organization. It will also enable all involved to prepare for more efficient processing and timely acknowledgement of gifts.

In order to help make each request productive, our staff will need some time to give full consideration to:

- The prospect's history of giving to Union College and/or other philanthropic efforts.
- The prospect's affiliation with the program or project.
- The College's past, pending or future plans for solicitation of that particular prospect.
- The amount to be requested and the level of priority associated with the project.

All checks should be made payable to Union College. If the gift is intended for specific use within a department, either the check or accompanying documentation should convey that information.

When a contribution is received, it should be sent or delivered to the Advancement Office, Attn: Glenda Schilt, Advancement Services Coordinator, along with any pertinent information about the gift or the donor - including full name, current address, phone number, and their relationship to the college (an alum, parent, friend, etc).

All gifts to the College need to be processed by the development staff:

1. so that appropriate recognition is given and credit is recorded for the donor;
2. to ensure the contribution is accounted for in the gift system;
3. and to properly generate an official College receipt for the donor's records.

Additional letters of appreciation from those departments or students benefiting from the gift are not only appropriate but also encouraged. (A copy of these should be sent to the Advancement Office for the donor's file)

Publicizing Gifts to Union

As appropriate, when a major gift is received the Advancement Office informs the Office of Communications. The Office of Communications in collaboration with the Advancement Office handles publicity for major gifts received by the College, including press releases and photos to the appropriate newspapers.

Donors may be contacted for additional details, including quotes to be included in news releases and/or articles. If a donor prefers not to publicize his or her gift, please indicate so when submitting the contribution and other documentation to the Advancement Office.

A Gift-In-Kind may include equipment, materials, supplies, books, art and other non-negotiable items that are accepted with the intention that they be retained and used by Union College for our educational purposes. For gift processing, the Advancement Office will need documentation such as a copy of a letter describing the item(s) from either the donor or from the faculty or staff member receiving the gift. In some cases, titles, serial numbers, model descriptions or other identifiers help distinguish these kinds of gifts. It is important to note that it is the responsibility of the donor --- not the College --- to put a value on these types of gifts. However, we need an estimated value of the donation for our purposes. For IRS purposes, any gift-in-kind valued at \$5,000 or more requires a qualified appraisal.

Naming Opportunities are managed through the Advancement Office in cooperation with the Office of the President.

For more information, please contact the Advancement Office at extension 1659.

gs, 2/12