Fundraising Coordination Policy

POLICY STATEMENT
UAF Development recognizes the importance of coordinating fundraising for UAF and its units and is committed to donor-centric fundraising practices. In collaboration with the Development office and your unit development officer (if applicable), we encourage UAF faculty and staff to develop relationships and engage potential donors with programs at UAF. Ideally, everyone on campus should be working towards engaging potential philanthropic partners with UAF and it will require participation by all in order to be successful in raising significant philanthropic support for students, research and programs. However, communication and coordination are vital to our success in fundraising as an institution. To that end, it is UAF policy that all UAF employees, students and volunteers contact UAF Development when they are building donor relationships and before solicitations (of monetary or in-kind donations) are made to foundations, corporations, businesses or individuals.

BACKGROUND & JUSTIFICATION
Private giving provides UAF with critical funds that provide a level of excellence that would not be possible otherwise. UAF provides academic programs ranging from certificates to advanced level PhDs.

UAF Development’s primary responsibility is to build donor relationships with the goal of raising private funds from corporations, foundations and individuals to support UAF’s mission of education, outreach and research. The goal is to match university priorities with donors’ interest (donor-centric model) to create a sustainable, mutually beneficial partnership. A strong understanding of UAF’s mission and priorities is needed to accomplish annual fund-raising goals – and collaboration with UAF leadership is essential.

In addition to its work with the Chancellor and UAF departments and programs, UAF Development collaborates with the UA Foundation, as well as other MAUs to coordinate fundraising communication and to ensure that the University is coordinating donor approaches and strategies. The Foundation manages a Prospect Management and Tracking System (PMATS) and all MAUs are required to follow these guidelines.

Based on industry standards, it can generally take 18 months to cultivate donor relationships that result in a major gift ($25,000+). Failure to plan and coordinate appropriately can represent the University poorly, potentially damage donor relationships and ultimately result in no funding.

DEFINITIONS
UA Board of Regents Policy 05.14
University Regulation 05.14
UA Foundation Prospect Management and Tracking System (PMATS) Policies and Procedures

REFERENCES RELIED UPON
UAF Fundraising Goals and Priorities
The UAF Development Office, in partnership with the UAF Chancellor and Deans/Directors, creates and manages the fundraising plan for UAF. This plan is based on UAF departmental funding priorities, as well as needs and initiatives set forth by the UAF Chancellor. For a summary of this year’s priorities and goals, please contact Emily Drygas, Director of Development, at 907-474-6631 or via email at emily.drygas@alaska.edu.

The primary vehicles in place to raise philanthropic funds at UAF are as follows:
1. **Annual giving program**
2. **Scholarship program** (400-plus privately funded scholarships)
3. **Major gift program** (to include planned giving).

**Statewide Collaboration**

All charitable gifts to the University must be received via the UA Foundation.

According to Board of Regents Policy (05.14) and University Regulation (05.14) “The solicitation and acceptance of charitable gifts for the benefit of the University of Alaska will be done in manner that yields the greatest possible outcome for the University and the donor. Regents’ Policy requires that all solicitations be coordinated through the Statewide Office of Development, in accordance with the process established through the Prospect Management and Tracking System.”

**UAF’s Role**

The UAF Development Office and/or your unit development officer will collaborate with Statewide Development on your behalf to coordinate all UAF efforts in managing donor relationships within the Prospect Management and Tracking System.

**RESPONSIBILITIES**

**Communication and coordination are vital to our success in fundraising as an institution.** We all play a part in representing UAF positively and engaging potential donors. With that comes a responsibility to UAF supporters to communicate with each other internally and present a consistent message. All UAF employees and students who are working towards current or future fundraising goals and are planning to solicit private philanthropic support for UAF need to contact UAF Development **before** solicitations are made. UAF Development can help ensure a united message, and ensure that donors are recognized appropriately.

UAF Development can work with you to strategize best fundraising approaches, communicate with other departments at UAF and other MAUs, and help navigate Foundation procedures when gifts are made to the University.

**NON-COMPLIANCE**

In order to ensure coordination with UAF donors, **we need to work together as an institution.** It is imperative that UAF departments communicate with each other and with UAF Development regarding strategies and approaches with donors. When the University is not coordinated in its fundraising messaging, donors are often frustrated and proposals are not funded. In addition, failure to coordinate may result in:

- Departmental budget reallocation by the Chancellor
- Prospect (donor) reassignment by the Foundation

**EXCEPTIONS**

In some cases, donors will approach departments directly (unsolicited) regarding support for individual units. When this happens, contact UAF Development with updates. Development can keep the Foundation and other MAUs up to date on donor intent and activities within the UAF campus.

**PROCEDURES**

If your program, unit or department has a fundraising need, please take the following steps:

1. First, contact your department leadership (dean, director, etc.), department development officer (if applicable), or the Vice Chancellor for Advancement to determine if the program is a **fundraising priority** for your college, school or department.

2. Once your department has identified your program as a fundraising priority, **identify** potential donors and supporters that are closest to your program.
   - Who are you interested in asking to support your program and why?
• What is your timeline? When will you need funding? (Reminder: major gifts can take an average of 18 months to cultivate.)
• Is anyone else at UAF potentially working/communicating with these donors?

3. Contact the UAF Development Director or your unit Development Officer as you are building donor relationships and before you solicit anyone (foundation, corporation, local business or individual) on behalf of UAF.
   • This will help limit duplicate or overlapping requests to key UAF donors and ensures comprehensive fundraising coordination throughout UAF.

4. Collaborate with UAF Development to reach fundraising success. Development staff can help you strategize by:
   • Coordinating your fundraising efforts with others at UAF to present a coordinated message to potential donors.
   • Choosing the best timing, mechanism, and ask amount for the most effective results.
   • Researching potential donors that may be interested in your programs.
   • Providing valuable tax credit information that may assist corporate donors with their giving.
   • Assisting with helping to ensure all donors are thanked for their support of UAF.

POLICY APPROVED BY:

Signed:__________________________________________
Brian D. Rogers, Chancellor
University of Alaska Fairbanks