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**MEMORANDUM:**

**TO:** University of South Carolina Deans, Department & Institute Chairs, Directors of Development, Carolina Alumni Association, University, Athletics, System campuses, University Publications, Advancement Services, Student Affairs

**FROM:** Michelle Dodenhoff, Interim Vice President for University Advancement  
Lola Mauer, Director of Annual Giving

**DATE:** July 29, 2008

**SUBJECT:** Annual Giving solicitation policies and procedures

The purpose of this policy is to preserve the University of South Carolina's credibility among its annual supporters as well as to optimize resources.

The policies and procedures outlined in the enclosed document are effective immediately. Please contact Lola Mauer, Director of Annual Giving, with any questions regarding the OAG solicitation policies and procedures.

*Carolina Fund | President's Society | Carolina Circle | Senior Legacy | Y'ALL  
Family Fund | Reunion Giving | Parents Fund | Carolina Callers*

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# Annual Giving

The Office of Annual Giving (OAG) is the overarching annual giving program for the University of South Carolina's Columbia campus. The goal of the OAG is to broaden the base of support to the University. Gifts are directed as the donor wishes and may be designated for a specific fund or used for unrestricted campus-wide purposes. OAG solicitations are generally conducted through direct marketing (direct mail, phone, and email, etc.).

The OAG coordinates ongoing solicitations for support in a fiscal year cycle on behalf of the University of South Carolina, its schools, colleges, campuses and other academic/service departments. OAG defines annual giving as all current gifts attributable to annual solicitation efforts. Gifts are typically less than \$25,000, repeatable in nature, and are not payments made on major, pledged commitments. Pledges for annual support are typically fulfilled within one year.

All fundraising efforts that are external to major gift cultivation and solicitation are to be coordinated with the OAG. The OAG will effectively manage and track fundraising efforts in which multiple donors are contacted, no matter the designation. **The purpose of this policy is to preserve the University of South Carolina's credibility among its annual supporters as well as to optimize resources.**

## Annual Giving Solicitation Policies

In order to provide the most effective program with both personnel and operating resources, the following policies apply:

1. All annual gift solicitation efforts targeting University of South Carolina alumni, parents, friends, faculty, staff or other University of South Carolina affiliated entities should be submitted for scheduling and coordination through the OAG. This includes mass appeals for donations and all communications made via telephone, email, letters, newsletters, brochures, annual reports, pledge cards or any other direct mail procedure.
2. The OAG is not required to personally handle each mass solicitation through its office but **must** be notified of all mass solicitation plans. The OAG should be provided with a sample of the solicitation piece.
3. Colleges, campuses, departments, etc. have the option of targeting a specific appeal to their constituents during the fiscal year. All appeals, including the solicitation date, must be coordinated with the OAG. Colleges and campuses often have unique fundraising projects arise during the course of a year. Examples include honoring a retired or deceased professor, class anniversary, departmental initiative or special endowment. If the Director of Annual Giving and the Director of Development in your college or on your campus determine that a special project has the potential to outperform a regularly scheduled solicitation, the special mailing may be substituted for the centralized mailing at any time during the fiscal year.

4. When the OAG is handling the solicitation, the requesting colleges, schools, departments, campus, etc. should first complete a Solicitation Request Form and return the document to the OAG a minimum of eight weeks prior to the solicitation's projected mail date.
5. The requesting school/college/department/campus incurs the cost of the entire project (printing, assembling and postage).
6. OAG staff is available to work in a consulting role with schools, colleges, and departments participating in direct marketing solicitations. OAG will advise on aspects of the solicitation including copy writing, layout, design, paper, printing, timing, adherence to postal regulations, and other standards. Any costs incurred, including postage, are the responsibility of the school/college/department.
7. OAG will determine and publish, in calendar format, the known annual solicitation schedules and strategies for all constituencies (see communication calendar section below).
8. All mass solicitations should include a reference that the project is being conducted as part of the University of South Carolina's annual giving program, thus including the appropriate artwork/logo.
9. All solicitations involving monetary requests from faculty, staff and/or retirees **must** acknowledge the Family Fund campaign.
10. Solicitations involving parents of current or former University of South Carolina students must have the approval of the Office of Parents Programs as well as the OAG.
11. Solicitations sent by the OAG-Columbia campus do not include regional campus graduates unless the constituent also attended the Columbia campus.
12. All University of South Carolina online (via web pages) references to supporting a college/department or other University area financially shall reference [www.sc.edu/giving](http://www.sc.edu/giving) and how to submit gifts as outlined in this document.
13. Fundraising phone campaigns will not be conducted elsewhere on campus or through outside private or volunteer contractors unless permission is granted in writing by the Vice President of University Advancement.

*Telephone solicitation of all annual gift prospects is directed by the OAG and conducted utilizing an automated system located on the 7<sup>th</sup> floor at 1600 Hampton Street in Columbia, SC. The OAG employs only current University of South Carolina students who complete approximately 12 hours of training. Carolina Callers are continuously monitored and evaluated to ensure the highest performance. Calls are currently made on behalf of all fourteen colleges on the Columbia campus as well as each campus, the Parents Annual Fund, the Senior Class Legacy, Reunion Giving, President's Society, Carolina Circle, Gamecock Club and Alumni Association.*

#### **Annual Giving Solicitation Materials Guidelines**

1. All annual gift solicitations must have a solicitation code assigned to each project (set by the OAG). The OAG will forward completed Solicitation Request Forms to Advancement Services so that the gift processors can be notified about the appeal, solicitation code, allocation and any other special handling information. The code is used to track the progress and effectiveness of each solicitation and enables the OAG to provide detailed reports to University units. Solicitation codes will not be set by individual schools/colleges/departments, etc.
2. Business reply envelopes (including newsletter inserts) should be addressed to the Office of Gift Processing -1600 Hampton Street, Suite 736-Columbia, SC 29208. Individual

schools/colleges/departments should **not** have gifts to the University or one of its affiliated foundations mailed to their respective offices. All gifts will be designated as indicated by the donor.

3. A pledge card template, approved by Advancement Services, is currently part of the OAG. All solicitations are to include this pre-approved verbiage to ensure that gifts are recorded properly and in a timely manner. The requestor may select the designation(s) that are placed on the cards.
4. Pledge cards which are paid for with state funds must contain USC Treasurer's Office terminology as ordered by the SC Legislative Audit Council. This statement applies to any form of solicitation whether it is an ask within a newsletter, an envelope within a newsletter, etc.
5. University Publications will notify the OAG of any college/school/departmental/campus requests for the design of solicitation materials.
6. Donor checks must be made payable to USC Foundations or the USC Treasurer's Office.
7. Any correspondence from donors will be immediately sent to the school/college/department that issued the solicitation.

### **Communication Calendar**

1. A calendar, managed by central Development, will be utilized to reflect all requests for solicitations. This includes all mass mailings to University constituents that involve **any** request for funds.
2. The calendar will reflect the projected mail date of an appeal and include who is receiving the solicitation. (i.e. graduates of the last decade, a specific college or department, dues renewals, etc.)
3. Solicitation/membership mailings must be placed on the calendar no less than eight weeks before the projected drop date. All mailings, such as magazines or newsletters that include requests for funds and have a return envelope must also be included. E-blasts are required to be placed on the calendar no less than two weeks from the drop date. Email blasts placed on the calendar include flash video, e-newsletters, and e-solicitations but are not solely limited to those examples.
4. The calendar will be viewable by anyone with proxy access to the account. Central Development will grant access to the calendar upon request. A limited list of individuals will be able to write, edit and delete their own projects within the calendar.

*This document is effective as of July 29, 2008.*

*The policies and procedures outlined in this document are subject to change.*

