

## University Foundation: Donor Relations

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## Our Mission

University of Montevallo Foundation operates to advance the mission of the University of Montevallo in all of its educational, instructional, service, charitable, and outreach endeavors. The overriding mission of the University of Montevallo, unique in higher education in Alabama, is to provide to students from throughout the state an affordable, geographically accessible, “small college” public higher educational experience of high quality, with a strong emphasis on undergraduate liberal studies and with professional programs supported by a broad base of arts and sciences, designed for their intellectual and personal growth in the pursuit of meaningful employment and responsible, informed citizenship.

## Defining Stewardship at the University of Montevallo Foundation

Merriam-Webster defines stewardship as “the conducting, supervising, or managing of something; especially the careful and responsible management of something entrusted to one’s care.” The University of Montevallo Foundation chooses to go beyond responsibility to develop relationships with our donors. ***It is our intent to maintain three key elements of stewardship with each of our donors: acknowledgement, recognition and reporting of donor activity.*** Each step is a building block to a long term relationship with those who invest in the University of Montevallo and the students we serve.

Julia Emlen's *Intentional Stewardship: Bringing Your Donors to Their Highest Level of Philanthropy* (CASE, 2007) notes: a good stewardship program seeks to promote eight key behaviors among donors:

1. Giving regularly
2. Giving to priorities
3. Giving in usable ways
4. Giving to capacity
5. Feeling recognized
6. Willingness to participate
7. Spreading the message
8. Bringing others along

## **Introduction**

**What should I do if I receive a gift?** All donations should be delivered to the Office of University Advancement, located in the Meroney House, the same business day or within one business day of acceptance. If the gift is acquired while travelling, have it delivered to University Advancement the same day you return to campus.

**What this manual is and why we use it.** The donor relations manual is part of the policies and procedures of the University of Montevallo Foundation. It exists to provide guidance to University faculty & staff to maintain standards and ensure donor relations activities are equitable across all levels of giving.

**Who is responsible for updating policies and procedures in this manual, when and how often?** The manager of donor relations will review and update the manual annually.

**Who reviews and approves the policies and procedures in this manual?** This manual is reviewed and approved by the Chairperson of the Development Committee of the University Board of Trustees, the University President, and the Executive Director of the UM Foundation.

**Who receives a copy of this manual?** This manual will be housed in University Advancement and Alumni Affairs, the Physical Plant, each of the four colleges, athletics, and it will be made available for all faculty, staff and external constituents on the University website.

## **I. Gift Acknowledgements**

### **A. Gift Receipts**

All gifts received by the University of Montevallo are acknowledged with the University's official gift receipt, designed by the Office of University Advancement within 48 hours of receiving the gift. This standard response is supplemented in many instances by additional forms of acknowledgement, including letters generated from colleges and units across campus.

### **B. Call Center Thank You Notes**

Hand-written thank you notes will be generated by the staff of the call center as assigned by the call center manager.

### **C. Call Center Thank You Calls**

The staff of the call center, as assigned by the call center manager, will call every donor at the beginning of October to thank them for the previous fiscal year gift.

### **D. Departmental Gift Acknowledgements**

Gifts and pledges to specific departments and projects are acknowledged by a letter signed by an assigned account rep, department chair or Dean. The individual departments are responsible for generating these letters to let donors know that their financial support is gratefully received, vital to our school community, and being used according to their stated wishes and expectations.

### **SGA President Gift Acknowledgements**

Gifts of \$250 and above are acknowledged by a letter signed by the SGA President. The Office of University Advancement and Alumni Affairs is responsible for generating these letters to let donors know that their financial support is gratefully received and is vital to our school community.

### **E. President's Office Gift Acknowledgements**

Gifts and pledges of \$500 and above are acknowledged by a letter signed by the President of the University. The Office of the President is responsible for generating these letters to let donors know that their financial support is gratefully received, vital to our school community, and being used according to their stated wishes and expectations.

### **F. Memorial & Honorary Gift Acknowledgements**

All memorial and honorary gifts receive special acknowledgement by the Office of University Advancement. Normally, the names of donors who contribute to memorial or

honorary funds are shared with the family members and friends associated with these accounts (through letters sent from the Office of University Advancement) so that they may offer additional gift acknowledgements.

## **II. Recurring Donor Communication Plan**

The University of Montevallo values contributions made to the Montevallo Fund through the Foundation's annual giving campaigns. Donors who give to these funds are vital in a number of ways to the health and well-being of the University's culture of philanthropy. They help provide income both for specific projects and unrestricted funds, enable patterns of giving to be tracked, establish a donor pipeline, enable the identification of donors with the potential capacity and propensity to give bigger gifts in the future, increase participation rates, help improve and keep data about prospects up to date, help identify the enthusiasts who might be leaders or significant volunteers and more.

### **1. Recurring Annual Gift Donors Include**

- Alumni
- Faculty/Staff
- Emeriti
- New Donors
- Flowerhill Society
- 1896 Society
- Other donors whose giving is under \$1,000/annually

### **2. Acknowledgement Letters**

1. First-time donors:
  - New Donor Kits: All first-time donors receive the New Donor Kit
  - Thank you letter from a fund account rep
2. Recurring donors:
  - Thank you letter from a fund account rep
3. Recurring donors whose giving levels reach \$250 in a fiscal year:
  - TY letter from the SGA President (new letter and signature annually)
4. Recurring donors whose giving levels reach \$500 in a fiscal year:
  - TY letter from the President's Office
5. Recurring donors whose giving levels reach \$1,000 in a fiscal year
  - President's Circle membership
  - Recognition in the Honor Roll of Donors
  - Invitation to exclusive donor appreciation events

### **3. Phone Calls**

All donors who give between October 1 and September 31 receive an annual thank you call from the call center.

#### **4. Year-end Reporting**

- Donors in these categories will receive a student impact story in the fall. It may be a mail or an e-mail piece.
- Donors in these categories will receive an update on Unrestricted Giving in the fall. It may be a mail or an e-mail piece.

#### **5. Other Communication**

- All occasions cards
  - Birthdays
  - Sympathy
  - Get well soon
  - New baby
- Montevallo Today
- Quarterly Advancement E-News

### **III. Donor Recognition**

#### **A. Giving Societies**

In addition to the various recognition societies present within the colleges and units, the University of Montevallo Foundation recognizes donors in the following gift societies: Annual Fund Donors, President’s Circle, Purple & Gold Society, King House Society, Flowerhill Society, Red Brick Society, Palmer Society, Reynolds Society, Montevallo Society, and the 1896 Society.

#### **Annual Giving Societies (October 1st – September 30<sup>th</sup>)**

Annual Membership is based on the University’s fiscal year (October 1 – September 30) and is renewable. Annual giving societies have a tiered structure at various giving levels:

<b><u>Name</u></b>	<b><u>Amount</u></b>
Flowerhill Society:	20 or more consecutive years of giving at any level
King House Society:	\$10,000.00 and above
Purple & Gold Society:	\$5,000.00 - \$9,999.99
President’s Circle:	\$1,000.00 - \$4,999.99
Annual Fund Donors:	Below \$1,000.00

**Flowerhill Society** members are recognized for their loyalty to the University. Members of the Flowerhill Society are alumni and friends who have contributed to the University Foundation for at least 20 consecutive years. The Flowerhill Society members are honored with:

- Recognition in the Honor Roll of Donors
- A recognition pin for their first year in the society
- Annual invitation to a special event at Flowerhill
- Public recognition at selected events
- Post-event photos
- Quarterly Advancement E-News
- Annual student impact story and an update on Unrestricted Giving
- Annual birthday Card
- Annual thank you phone call

**The King House Society** highlights the generosity and loyalty of Montevallo's most influential supporters. King Society membership is conferred with an annual donation of \$10,000 or more. King House Society members are honored with:

- Recognition in the Honor Roll of Donors
- Invitations to special events on campus throughout the year, including an invitation to an exclusive event with the President
- Public recognition at selected events
- Post-event photos
- Quarterly E-Newsletter
- Annual student impact story and an update on Unrestricted Giving
- Annual birthday and holiday cards
- Annual thank you phone call

**The Purple and Gold Society** acknowledges those donors who have contributed between \$5,000 and \$9,999 during the fiscal year. Purple and Gold Society members are honored with:

- Recognition in the Honor Roll of Donors
- Invitations to special events on campus throughout the year, including an invitation to an exclusive event with the President
- Public recognition at selected events
- Post-event photos
- Quarterly E-Newsletter
- Annual student impact story and an update on Unrestricted Giving
- Annual birthday and holiday cards
- Annual thank you phone call

**The President's Circle** recognizes alumni and friends who have contributed between \$1,000 and \$4,999 during the fiscal year. President's Circle members are honored with:

- Recognition in the Honor Roll of Donors

- Annual invitation to a special event at Flowerhill
- Public recognition at selected events
- Post-event photos
- Quarterly E-Newsletter
- Annual student impact story and an update on Unrestricted Giving
- Annual birthday card
- Annual thank you phone call

## Cumulative Giving Societies

Membership is based on cumulative giving and is perpetual. Cumulative giving societies have a tiered structure at various giving levels:

<u>Name</u>	<u>Amount</u>
1896 Society:	Estate/Planned Gift
Red Brick Society:	Cumulative giving of \$25,000.00 - \$99,999.00
Palmer Society:	Cumulative giving of \$100,000.00 - \$499,999.00
Reynolds Society:	Cumulative giving of \$500,000.00 - \$999,999.00
Montevallo Society:	Cumulative giving of \$1M +

**The 1896 Society** recognizes and acknowledges individuals who have made the University of Montevallo a part of their estate plans. 1896 Society members demonstrate dedication, affection, and service to Montevallo through their selfless generosity. 1896 Society members are honored with:

- Recognition in the Honor Roll of Donors
- A recognition pin
- Invitations to special events on campus throughout the year, including an invitation to an exclusive event with the President
- Public recognition at selected events
- Post-event photos
- Quarterly E-newsletter
- Print newsletter three times a year
- Annual student impact story and an update on Unrestricted Giving
- Annual personal visit
- Annual birthday and holiday cards

**The Montevallo, Reynolds and Palmer Societies** acknowledge the cumulative giving of individuals and organizations. Recognition in the Montevallo Society begins at \$1M, the Reynolds Society at \$500,000, and the Palmer Society at \$100,000. Members of these three societies are honored with:



- Recognition in the Honor Roll of Donors
- Invitations to special events on campus throughout the year
- Public recognition at selected events
- Post-event photos
- Quarterly E-newsletter
- Annual birthday and holiday cards
- Annual personal visit
- Annual “you made a difference” communication piece, specific to their area of giving

**The Red Brick, Society** acknowledge the cumulative giving of individuals and organizations between \$25,000 – \$99,999.99. The generosity of these donors through the years has paved the way for the education of many students, just as the red bricks pave the streets and sidewalks of Montevallo. Members of these four societies are honored with:

- Recognition in the Honor Roll of Donors
- A recognition pin
- Invitations to special events on campus throughout the year
- Public recognition at selected events
- Post-event photos
- Quarterly E-newsletter
- Annual birthday and holiday cards
- Annual personal visit
- Annual “you made a difference” communication piece, specific to their area of giving

## **B. Honor Roll of Donors**

- Recognition begins at \$1,000/year and is based on ***cash gifts, pledge payments, matching gift cash gifts, and in-kind gifts.***
- Donors who are members of the same household will be recognized together, unless they tell the University in writing that they want separate recognition.
- Donors who wish for their gifts to remain anonymous must notify the University in writing. Anonymous donors will receive no public recognition of gifts made either that fiscal year or future gifts unless the University is notified in writing; however, they will receive other recognition – such as invitations to special events - appropriate to their level of giving.
- Donors who make multi-year pledges of \$25K or higher will be recognized as a member of a permanent giving society after the pledge is paid in full; in the meantime, we will recognize pledge payments as annual gifts.

## **C. Naming Opportunities**

A building, room or area may be named in honor or recognition of an individual or group.

- Naming opportunities must be approved by the University’s Board of Trustees.

- A master list of all naming opportunities (donor name, amount and date of gift/pledge, and location of plaque) must be maintained by Advancement Services.
- A gift agreement must be signed by the donor at the time a named area is offered. Recognition will be according to the terms of the agreement.
- Dedication ceremonies will be offered to donors of \$25,000 and above.
- Exterior plaques should resemble existing campus signage.
  - Black and white building signs – order from the Physical Plant
  - Cast bronze plaques with patina finish (ex.: Colonnade or *Becoming*)
- Interior plaque materials should be neutral and/or complimentary of interior colors and design
- Plaque sizes are dependent on the level of giving:

<b>Gifts of</b>	<b>Plaque Size</b>
\$50,000 and above	12" x 14"
\$15,000 - \$49,999	10" x 12"
\$10,000 - \$14,999	8" x 10"
\$5,000 - \$9,999	6" x 8"

- Exterior letters must be black to match other buildings on campus.
- Authorized plaques may not be installed or removed without the approval of the Executive Director of University Advancement. If an unauthorized memorial or tribute plaque is installed, the Physical Plant reserves the right to remove it.
- University Advancement must be notified of the care and location of plaques that are temporarily in storage.
- When a plaque is installed, it must be recorded in the donor record.

## **D. Benches, Bricks, Trees**

Students, Faculty & Staff, Alumni, and Friends of the University can make a donation to the UM Foundation to purchase a landscaped item as a memorial or tribute item. These items include and are limited to bricks, pavers, benches and trees. If the University uses donor funds to add a new structure or feature to campus, the Foundation reserves the right to add a brick, paver or plaque to recognize and thank the donor(s) to the project. Foundation staff and Physical Plant staff are responsible to coordinate the purchase, engraving and installation of any bricks, pavers, plaques, benches, and trees for campus that are the result of a donor gift. The donor may select a general location for their item (*i.e. near Tutwiler residence hall*).

### **1. Bricks**

- \$250 for one regular 4" x 8".
- Price includes engraving and installation

- Installation costs will be absorbed by the Physical Plant, but exceptions may apply
- Engraving ordered through UM Foundation
  - Bricks can be personalized with a choice of logo and up to three lines of text
  - Available Logos:
    - Falcon Logo
    - University Seal
    - Alabama College Logo
    - UMNAA logo
    - Greek Letters (4 characters max)
  - Text is up to three lines; up to 14 characters per line

## 2. Pavers

- \$1,000 for one 16" x 12" Limestone paver (sometimes called "Large Bricks")
- Can be personalized with a choice of corporate logo or UM seal
- Reserved for recognition of major gift contributions starting at \$5,000 to special projects
- where other recognition opportunities may not be available
- Price includes engraving and installation
  - Installation costs will be absorbed by the Physical Plant, but exceptions may apply
  - Stone and engraving ordered through Joel Eliason (unless he shares his contact with UM Foundation, then the Foundation can place orders directly)

## 3. Plaques

- Outdoor plaques should resemble existing campus signage.
  - Black and white building signs – order from the Physical Plant
  - Cast bronze plaques with patina finish (Colonnade or *Becoming*) - order from Fravert

## 4. Benches

\$2,500 – for one black metal 72" (6-foot) "Scarborough" bench from Landscape Forms ([www.landscapeforms.com](http://www.landscapeforms.com)). The Physical Plant will approve the location of the new bench and be responsible for purchasing and installing it. Price includes a 2" x 10" bronze recognition plaque and installation.

- Installation costs on an existing surface will be absorbed by the Physical Plant
- Installation costs on a brick pad - \$150 charge to the Foundation
- Bronze plaque may have up to four lines of engraving; up to 30 characters per line

## 5. Trees

A memorial or tribute tree may be purchased at one of the following levels. Existing trees are not eligible for this benefit. If an unauthorized memorial or tribute marker is placed with an existing tree, the Physical Plant reserves the right to remove it.

The Physical Plant will approve the location of the new tree and be responsible for purchasing and planting it. The following prices include the cost of the tree and the marker, and the costs to plant and landscape around it.

- a. **Level I gift** - \$2,500 This level includes a flowering specimen tree with an expected life of 25 years. A small marker will be placed at the base of the tree recognizing the donor.
- b. **Level II gift** - \$5,000 This level includes a tree such as maple or oak with a guarantee of replacement if the tree dies or is damaged within 50 years. A small marker will be placed at the base of the tree recognizing the donor.
- c. **Level III gift** - \$10,000 This level includes a tree such as oak with a guarantee of replacement if the tree dies or is damaged within 100 years. A small marker will be placed at the base of the tree recognizing the donor.

## IV. Endowment Reports

Annually, the Office of University Advancement generates Endowment Reports for endowed funds. These reports reflect the status and endowment growth of each fund during the previous fiscal year. They are distributed to the donors and/or donor representatives of qualifying funds. The Manager of Donor Relations works closely with the Director of Advancement Services and the Foundation Accountant to ensure accurate and timely reporting. New stewardship contacts are set up throughout the year as new funds are established. For endowed scholarship funds, scholarship recipient names are included as part of these reports.

### A. Scholarship Donor Stewardship

Donor appreciation, use of gift, and meaningfulness is demonstrated by providing scholarship donors with financial updates and recipient information. This is accomplished in part through the office of Advancement by providing customized reports on specific scholarships, sending student thank you cards twice annually, providing scholarship recipient updates when available, and inviting all scholarship donors to an annual appreciation luncheon.

## V. Donor Events

The Office of University Advancement hosts four signature donor recognition events: the Scholarship Appreciation Luncheon, the President's Circle Reception, the Retired Faculty and Staff Luncheon, and the 1896 Society Luncheon. The Office of University Advancement ensures that appropriate constituents are invited to associated donor events. Invitation and attending lists and other pertinent information is shared with development staff and other campus representatives as necessary.

Other campus representatives may coordinate with the Office of University Advancement to offer additional donor events such as luncheons and receptions that may be held throughout the year.

## **VI. Strategic Stewardship for Top Donors**

### **A. Annual Touches for each Top donor (as determined by solicitor)**

- “You made a difference” (YMAD) pieces annually.
- Report from the field on specific programs annually, depending on when donors gave their gifts.
- Twice a year thank you calls in addition to regular thank you calls.
- Twice a year “I know you” communications. These are notes, e-mail links, cutout magazine or newspaper articles, etc. of something your donors have an interest in.
- Cultivation face-to-face visits. Not every face-to-face visit should involve a solicitation. Your visit is an opportunity to report back to donors how they made a difference and/or find out their passions and interests.
- Annual event invites and donor-view trips to see UM programs in action.

## **Stewardship Matrix**

Having a well thought out and logical thanking and stewardship structure is important for ensuring fairness to our donors, prospects and volunteers while simplifying our processes. The Office of University Advancement matrix shows increasing levels of stewardship and personal connection as donors give more.



**Stewardship Activity Matrix**

Action	Annual Giving										Cumulative Giving										
	\$0 - \$99	\$100 - \$499	\$500 - \$999	President's Circle (\$1,000 - \$4,999)	Purple & Gold (\$5,000 - \$9,999)	King House Society (\$10,000+)	Flowerhill Society (20+ Consec. Years Giving)	Red Brick Society (\$25,000+)	Palmer Society (\$100,000+)	Reynolds Society (\$500,000+)	Montevallo Society (\$1M+)	1896 Society	Endowed Fund Donors	Board of Trustees	Foundation Board	National Alumni Association	Junior Alumni Board	Naming & Capital Improvements	Senior Class Gifts/SGA gifts	In-kind Donations: furniture, artwork, etc.	Emeriti and Retirees
Printed Gift Receipt (all cash gifts and pledge payments)	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Thank you letter from University President (new cash gifts, pledges, pledge payments)																					
Thank you letter from Dean, Director, or Department Head (in-kind gifts, cash gifts, pledges, pledge payments)																					
Thank you letter from a Foundation Board Member (new cash gifts, pledges, pledge payments)	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Thank you note from student solicitor for Call Center (pledges and CC gifts rec'd during call)	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Thank you letter from the SGA President (min. \$250 annual gift)																					
Thank you letter from a Scholarship Recipient (annual)																					
Thank you call from student caller	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
New Donor Kit	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Invitation from the President to the 1896 Society annual luncheon and other events																					
Invitation from the President to an annual scholarship appreciation lunch																					
Invitation to Annual Retiree Luncheon																					
Invitation to President's Circle Reception																					
Recognition Pin																					
Groundbreaking, Ribbon Cutting or Dedication Ceremonies																					
Event Photos																					
Birthday Card from Foundation staff (min. \$250 annual gift)																					
Annual Endowment Fund Report																					
Recognition in the Honor Roll of Donors																					
Recognition signage																					
Last Updated: 10/03/2017 by Susan Brenner																					