



Solicitation Policy and Procedures

Last Updated: 1/30/2021
Pending Approval: 1/30/2021

Purpose: To establish a process for solicitation of donors by personnel external to University Advancement on behalf of the University

Definitions:

A **Solicitor** is a person who conducts, advises, and consults on behalf of Savannah State University and whose job responsibility is to take receipt of charitable donations or contributions made to the University.

University Advancement oversees all solicitation of donations made on behalf of the University. Anyone in the University community engaging in soliciting donations on behalf of the university, department within the university, for a university or foundation fund, and/or student organization must be coordinated with and approved in advance by the Division of University Advancement.

University community refers to the Savannah State University Foundation Board of Directors, administration, students (and student organizations), and all employees of the University as well as any volunteers.

Student organization refers to any entity that has complied with formal requirements of the university recognized as an active organization by student affairs.

Procedures:

All members of the University involved in fundraising should consult the Division of University Advancement (specifically the Development Office) before discussions with any potential benefactor.

An early consultation can:

- Reduce the risk of uncoordinated approaches to a single potential donor;
- Spread familiarity with the process for accepting benefactions;
- Include advice on the application of the ethical guidelines and best practices governing solicitations;
- Ensure donations are only accepted from sources and for purposes, acceptable to the University;
- Allow an early warning to anyone unknowingly approaching a potential benefactor whose donation is not likely to be acceptable.

The Division of University Advancement is responsible for the issuance of a gift receipt and acknowledgement for each gift to the University, in compliance with the IRS, as such coordinating departmental efforts with University Advancement ensures subsequent processes can be properly executed, and ensure the proper stewardship of the donor relationship with the University.



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A. University Community Fundraising

1. Student Clubs and Organizations

Students who intend to engage in fundraising on or off University premises must request approval. Requests for approval are made using the Solicitation Approval form in the appendix. A link to the form is provided in the appendix as well.

2. Athletics

Fundraising to support the athletics program is conducted through the Division of University Advancement. Coaches must submit fundraising ideas to the Athletics Director for consideration and approval. The Athletics Director must notify the senior most administrator in University Advancement and university foundation of all athletic team fundraising. The Solicitation Approval form in the appendix may be utilized but is not required. The Athletics Director and Advancement team will work collaboratively together regarding athletic fundraising.

3. Individuals and Volunteers

Individuals and volunteers fundraising on behalf of the University must coordinate such efforts with University Advancement. Prior to making contact with any potential benefactor, engage University Advancement for reasons previously aforementioned. As well, resources may be available to aid in the soliciting efforts. The Solicitation Approval form in the appendix should be used.

4. Administration and College Deans

Administration and College Deans are critical to solicitation efforts of the University. They are the key personnel, that by research and planning, responsible for identifying where additional resources are needed most, and aid University Advancement in crafting case statements for those needs. Administration and College Deans should always coordinate fundraising efforts and stay in constant communication regarding the establishment and execution of a college specific major gifts strategy.

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B. Dissemination of Solicitation

For clarity, the format of the solicitation may take different forms. Regardless of the format of the intended solicitation, all request for donations must be coordinated with and approved by University Advancement. The formats of solicitations are, but not limited to:

1. University Bulletin Boards – flyers seeking donations
2. Hand Distribution of Print Materials – print materials for hand distribution
3. Electronic Mail – Emails to prospects and
4. Phone / Text Messages – phone calls and text messages to prospects and benefactors
5. Social Media Post – post to any social media platforms by any staff personnel, student, and/or volunteer on behalf of the university
6. Cash App solicitation and other similar platforms – do not solicit using cash app. If the cash app account is not connected to the University operating bank account or foundation bank account, and the fund money is sought for resides on the university or foundation ledger, cash app solicitation is strictly prohibited. This includes Zelle, PayPal, cash app, or all other app based and/or online fundraising programs.
7. For items 1-6, flyer should not be posted, print material should not be distributed, email not sent, phone call / text message should not be made, social media post should not be posted, and app / online solicitation requested until after coordination and approval as aforementioned in this document.

Once efforts are coordinated, submitted for approval by University Advancement, and approved, guidance will be provided of how the student, university staff, individual, and/or volunteer should best proceed with the solicitation.

Donations resulting from solicitation efforts should be made payable to ‘Savannah State University’ and remitted promptly to University Advancement for gift receipting, acknowledgement, and deposit. All funds are deposited as designated.

Do not hold checks received from any benefactor. As a best practice, checks should be mailed to University Advancement, and/or credit card donations made through the University website. However, in the event, a benefactor hands the check to the student, university staff, individual, and/or volunteer, that persons should promptly remit such to University Advancement.

Do not accept cash. Should a donor or benefactor desire to make their donation by cash, forward them to University Advancement for guidance.



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Do not deposit via transmittal any **donations** received to the Cashier's Office. Again, donations resulting from solicitation efforts should be remitted promptly to University Advancement for gift receipting, acknowledgement, and deposit. University Advancement will process all gift donations via transmittal as needed to the appropriate office.