



BOISE STATE UNIVERSITY

University Policy 11010

Gift Solicitation and Management

Effective Date

July 1978

Last Revision Date

March 2013

Responsible Party

Vice President for University Advancement, (208) 426-3276

Scope and Audience

This policy applies to all gift solicitations.

1. Policy Purpose

To implement professional best-practices of gift solicitation and management that meet University philanthropic objectives and ensure a positive donor experience.

2. Policy Statement

Essential to the optimal and appropriate solicitation of gifts is the recognition that giving is a mutually beneficial, voluntary exchange by which the university's priorities are matched with donors' specific interests. Effective solicitation efforts are well-researched, carefully coordinated and are driven by the collective benefits of a rapport.

3. Definitions

3.1 Solicitation

A request on behalf of Boise State University or affiliated entities for a gift of cash, securities, personal property, real estate, or anything of material value.

3.2 Gift

Solicited or unsolicited money or property from a non-government source; the donor does not retain any reversionary interest and cannot be expected to receive any material deliverable from the act of donating funds.

3.3 Gifts-in-Kind

A gift of goods or services.

3.4 Deliverable

A tangible product or service resulting directly from the use of funds transferred to the University for which the donor will receive material, tangible benefit to which they would not otherwise be entitled, In other words, if the transfer of these funds would result in the donor deriving something of equal value that is unique or preferential. A benefit is “unique” if the donor were allowed to receive the benefit prior to the benefit being publicly available. Examples include the first or initial rights to specific research findings, inventions, etc.

3.5 Sponsored Project

A contribution not meeting the definition of gift.

4. Responsibilities and Procedures

4.1 Solicitation

4.1.1. Responsibility

Management and coordination of solicitation of gifts is centralized in University Advancement.

4.1.2. Authorization for Solicitation

Central administrators (President, Vice Presidents, Athletic Director, and development officers) and Deans may solicit or otherwise negotiate gifts for their particular project, unit or college.

4.1.3 Consultation and Coordination

Before soliciting any gift or undertaking any fundraising activities on behalf of Boise State University or subunit thereof, all employees of Boise State or their agents must consult with the Vice President of University Advancement or her/his designee and follow the established prospect coordination and approval protocols.

4.2 Management

- a. Gifts to the university are received and managed by the Boise State University Foundation.
 - (i.) All gifts of cash, securities and real estate shall be received by the Boise State University Foundation.
 - (ii.) All gifts-in-kind shall be received by the University and recorded and receipted by the Foundation.
 - (iii.) All financial reporting of gifts shall be managed by the Foundation.
- b. Services of University Advancement:
 - (i.) Leadership and implementation of fundraising efforts in support of the University's mission and priorities including annual giving, major gift, principal gift, planned gift, and campaign efforts.
 - (ii.) Prospect coordination, research and analytics.
 - (iii.) Donor and alumni communications.
 - (iv.) Planning and implementation of strategic donor and alumni-focused events.
 - (v.) Strategic cultivation of alumni and donor relationships for the purposes of engagement with and support of the University.
 - (vi.) Donor stewardship and recognition.

4.3 Exceptions

4.3.1 Priority of University Policy

Nothing in this policy should be construed to supersede existing University policy regarding sponsored projects and contract activities of the University.

4.3.2 Unsolicited Gifts

Unsolicited and spontaneous gift offers may be responded to at once. In such an event, however, immediate notification regarding the same shall be made to the Vice President for Advancement or her/his designee.

Revision History

July 1995; January 2008; April 2011; March 2013