

UNIVERSITY OF HOUSTON SYSTEM
ADMINISTRATIVE MEMORANDUM

SECTION: University Advancement

NUMBER: 08.A.01

AREA: General

SUBJECT: Management and ~~Development-Coordination~~ Development of University Advancement Activities

1. PURPOSE

- 1.1. University Advancement (Development and Alumni Relations) for the System interacts continuously with prospective donors, established donors and various donor groups. ~~The purpose of this policy is to ensure consistency in all representation of the System to prospective donors, established donors and various donor groups in order to maximize gift support to benefit the System and its universities. In order to maximize gift support to fulfill its mission of increasing both fundraising and constituent support for the priority objectives of the University, it is essential all representation of the System to prospective donors, established donors and various donor groups be consistent.~~
- 1.2. For the purposes of this document, prospective donors, established donors and various donor groups include alumni, alumni associations, corporations, ~~UH the System's support organizations-related foundations~~ and other volunteer groups, ~~including the staff, or officers, and/or any designated representative of of any such group, or designated representative of such.~~
- 1.3. ~~University of Houston System~~ This policy ~~for the regarding~~ management and ~~development coordination~~ development of University Advancement activities is in accordance with Board of Regents Policy [32.01](#).

2. POLICY

- 2.1. The Chancellor is responsible for giving broad direction to and ensuring coordination of University Advancement activities ~~throughout~~ the System.
- 2.2. Development and alumni relations activities (solicitations, events, and communications) involving the System will be planned and coordinated by the Chancellor or his/her designee(s) and managed by the President and appropriate professional staff at each component University. The President of each component is responsible for fundraising activities at the component university, and shall ensure that all fundraising activities are operated to support the institution's priorities and initiatives as identified by the governing board and the Chancellor.

2.3 ~~Development and alumni relations Fundraising~~ activities involving ~~the~~ System Administration, ~~the System's~~ universities, prospective donors, established donors and various donor groups are led by the Division Office of ~~the Vice Chancellor for~~ University Advancement through the Vice Chancellor for University Advancement and ~~through~~ System advancement leadership.

2.43. Gift ~~s~~Solicitations

2.43.1 Gift solicitations for a principal gift (typically \$1 million or greater) must be developed with the involvement of System advancement leadership and the Office of Principal Gifts and approved by the Vice Chancellor for University Advancement. ~~requires~~
~~the approval of the Vice Chancellor for University Advancement through annual business planning development with System advancement leadership and involvement of the Office of Principal Gifts.~~

2.43.2-4. Gift solicitations for a major gift of (typically \$25,000 or greater) more must be developed with require the involvement of System advancement leadership and must be approveds the approval by of the Vice Chancellor for University Advancement. ~~through annual business planning development with System advancement leadership.~~

2.43.3.2-5. Gift solicitations of under \$25,000 ~~requires the approval of the Vice Chancellor for University Advancement~~ must be developed with the involvement of ~~through the System advancement leadership development offices who will review and approve any mass solicitation through established System university policies and best practices and approved by the Vice Chancellor for University Advancement. This includes any solicitation campaign via phone, print or digital means. and to the Office of Annual Giving, who will review and approve the design, copy and timing of any mass solicitation through established System university policies and best practices. This includes any solicitation via direct mail, e-mail, telephone (including text) web or social media including crowdfunding efforts.~~

2.5 4.46. ~~Endowment m~~Management activities must be conducted in accordance with please refer to System Administrative Memoranduma 03.F.02

2.65 Gift acceptance activities must be conducted in accordance with System Administrative Memoranda 08.A.03 ~~AM are~~

2.757. All System-wide communications involving prospective donors, established donors or various donor groups will be coordinated through the Vice Chancellor

for University Advancement or System advancement leadership designee as appropriate.

2.8. ~~The Vice Chancellor for University Advancement shall coordinate~~Coordination of internal specific requests for institutional data (alumni and donor information) ~~shall be the responsibility of the Vice Chancellor for University Advancement through the System advancement business operations office. , - , who will be responsible for providing an effective infrastructure of support services to the fundraising enterprise including maintaining updated records of all pertinent information.~~

2.9 The Vice Chancellor for University Advancement is responsible for ensuring the privacy and accuracy of all institutional alumni and donor information contained in the Division Office of for University Advancement's records, as maintained through effective infrastructure of support services provided by the System advancement business operations office. :

~~2.9. — Coordination of responses to specific requests for the use of System facilities by various donor groups shall be the responsibility of the Office of the Vice Chancellor for University Advancement, in communication with the offices of the Vice Chancellor for Academic Affairs and Provost and Vice Chancellor for Legal Affairs and General Counsel.~~

3. REVIEW AND RESPONSIBILITIES

Responsible Party: Vice Chancellor for University Advancement

Review: Every three years on or before March 1

4. APPROVAL

Approved: Eloise D. Brice
 Vice Chancellor for University Advancement

Renu Khator
 Chancellor

Date: February 12, 2018

REVISION LOG

Revision Number	Approval Date	Description of Changes
1	09/04/1990	Initial version (Original Title: “Management and Development of Activities”)
2	11/26/1990	Changed title to “Management and Development of Fund Raising Activities.” Changed Sections 2.2 and 2.3 for the responsibility to be devised by UH system-wide communication processional staff for the Chancellor
3	04/14/1994	Changed title to “Management and Development of Institutional Advancement Activities.” Changed Sections 2.2 and 2.3 for the responsibility to be devised by the UHSA office of Institutional Advancement through the UHS Development Executive Staff or the UHS Public Affairs Group
4	01/31/2009	Applied revised SAM template to meet current documentation standards. Changed title to “Management and Development of University Advancement Activities.” Throughout document, changed Institutional Advancement to University Advancement. In Section 2.3, changed the UHS Public Affairs Group to the System University Relations Group. Added the VC of University Advancement to the approval cycle. Changed the review period from annually on or before December 31 st to every three years on or before March 1 st . Removed Section 5.0, Indexing Terms
5	07/27/2015	Applied revised SAM Template and added Revision Log. Added “led” to Section 2.2. Changed Section 2.3 to remove outreach strategies, marketing/branding, media relations, and publications activities. Changed System University Relations Group to System Advancement Executive Staff in Section 2.3

Revision Number	Approval Date	Description of Changes
6	02/12/2018	Added fundraising and Alumni Relations as activities in Section 2.1 as a responsibility for the Chancellor. Revised titles to reflect current operating requirements. No additional changes were made by the Subject Matter Experts (SMEs)
<u>7</u>	<u>TBD</u>	<u>Rewrote content to reflect current operating requirements, reflecting more task-oriented processes and responsibilities. Also included explanation of gift solicitations above and below \$25,000</u>