

COORDINATION POLICY – DONOR CONTACT AND SOLICITATION

This policy/procedure/standard is applicable to all SUNY COBLESKILL staff, faculty, volunteers and students.

I. PURPOSE

- A. Because problems can arise when past and prospective donors are contacted/solicited to make a contribution to SUNY Cobleskill (or its affiliates, clubs, etc.) by more than one person, it is in the best interest of these organizations to safeguard against excessive or uncoordinated requests.
- B. A coordinated fund raising effort that reflects our organizations' priorities will streamline the solicitation process and also benefit each organization.
- C. As many supporters have multiple interests, we need to be sensitive to these affiliations and be sure to present each donor(s) with opportunities that are most appropriate for their interests.

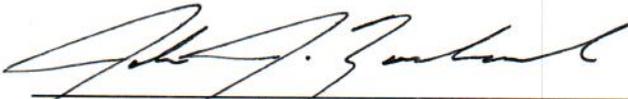
II. POLICY

- A. All contact and solicitation requests are to be presented to the Office of Advancement in writing (e-mail acceptable), and will subsequently be reviewed by the Vice President for Development. A determination will then be made if the contact or solicitation is appropriate and in alignment with organizational priorities.
- B. Please address these questions in solicitation request:
 - 1. Name of prospective donor
 - 2. Desired amount/date of proposed request
 - 3. Purpose of request
 - 4. Benefits to be provided related to the support (i.e. signage, logo printed on event posters, etc.)
 - 5. History of support/communications/involvement (i.e. Is this a continuation of past support? Has this prospective donor supported initiatives similar to this, internally or externally, in the past?)
- C. The approval process or any questions/concerns raised during the request process will be addressed by an Office of Advancement representative within ten (10) business days of receiving the request.

III. **PROCEDURES AND RESPONSIBILITIES**

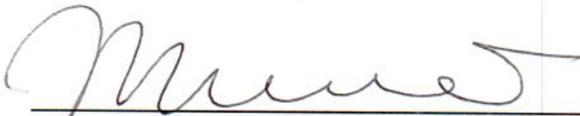
- A. Individuals seeking solicitation requests must forward solicitation request information to the Office of Advancement in writing.
- B. The Vice President for Development (or designee) will review the request and contact the individual with questions, recommendations for solicitation/stewardship actions, and/or approval as appropriate.

~ end ~



John J. Zacharek
Vice President for Development

10/3/2018
Date



Marion Terenzio
President

10/3/2018
Date

SC-JZ09182018