DEVELOPMENT OPERATING PRINCIPLES

GIFT APPLICATIONS

1. Unrestricted gifts to the institution may be applied as needed to the operating budget of the institution.
2. Gifts to endowment or facilities (i.e. capital projects) will be applied to the donor-specified fund.
3. Alumni annual gifts, unless otherwise specified, will be applied to the gift account designated in support of the alumni program or school's approved budget. Alumni matching gifts will also be applied in this manner. These gifts are to be considered unrestricted gifts to relieve the school and its programs from approved budget.
4. Restricted gifts will be applied to the donor-specified program/project that they support.
5. Any reallocation of gifts already booked will require the prior written consent of the donor.

GIFT SOLICITATION

1. Each school will work with its assigned development officer to develop a fundraising plan for that program, including the establishment of fundraising priorities and goals and the identification of prospects.
2. Prospect management is a centrally controlled function in the Office of Advancement.
3. The central Advancement Office, in conjunction (where appropriate) with the program, will review prospects and establish priorities for prospect solicitation.
4. Matching prospects to giving opportunities is a central Advancement Office function.
5. Proposals to foundations and corporations, including those reflecting private contracts and grants, must contain a line item budget, including items of departmental expense where appropriate, such as office expense, secretarial support, and faculty release time. The departmental expenses, or overhead, should be developed in consultation with the appropriate school development officer and the director of budget and business affairs.
6. All proposals must be approved by the school dean or program department chair, when appropriate, the Provost and Vice President for Academic Affairs, the director of budget and business affairs, and the Vice President of Advancement, prior to submission.
7. School solicitation of alumni will be coordinated centrally, with the appropriate school development officer as the primary contact.
8. Solicitation of any prospect requires the approval of the Advancement Office, through the assigned development officer of that school, to avoid duplication and intra-institutional conflict. This function is supervised by the President’s Funding Group.

NEW PROJECT/PROGRAM DEVELOPMENT PROCESS (FACULTY)

1. Faculty will meet with the school dean and the Provost to determine the academic viability of the project or new program. All projects and programs must be approved by both the school dean and the Provost and be part of the school’s or unaffiliated department’s strategic plan.
2. Any proposal that includes faculty release time must include the Provost’s approval.
3. After approval has been given, initial discussions between faculty and the appropriate development officer will begin regarding the likelihood of external funding and a timetable of submission and funding sources.
4. The budget for any faculty project or new program will be developed in conjunction with the appropriate development officer and the Budget Director.
5. The resulting proposal must be approved by the school dean and when applicable, the department or program chair, the Provost, the Budget Director, and the Vice President for Advancement, prior to submission.
RECEIPT AND ACKNOWLEDGMENT

1. All gifts will be deposited by the central development officer through development information services. Transmittal correspondence, as well as the transmittal envelope, should be included with the check.
2. Acknowledgment will be drafted by the appropriate development officer for signature by the President, Provost and school dean in accordance with the Office of Advancement policies.
3. Copies of accompanying correspondence will be forwarded to the appropriate school dean, as well as the appropriate faculty member(s), with reporting requirement highlighted.
4. The central development office will coordinate the timely submission of the required reports.