

## **Coordination of Development Activities at the University of Virginia**

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**Policy Type** [University](#)

**Contact Office**

[University Advancement \(Office of\)](#)

**Oversight Executive**

[Vice President for Advancement](#)

**Applies To**

Academic Division The Medical Center The College at Wise University-Associated Organization

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### **Reason for Policy**

The University recognizes the value of, and depends upon, the generosity of its alumni and friends to support its mission of teaching, research, public service, and health care. Planning and coordination are essential to successful fundraising efforts and to avoid duplication in approaching potential donors in the name of the University.

The Office of University Advancement, schools, centers, departments, and University-Associated Organizations that are authorized to receive funds on behalf of the University have together established guidelines for the coordination of development activities. These parties have established these guidelines for the most effective use of University resources in seeking private support for the University.

### **Definition of Terms**

#### [Bequest](#)

Property given to the University as the beneficiary of a will, revocable living trust, other testamentary instrument, or other non-probate assets such as a retirement plan, life insurance policy, or financial account.

## Gifts

Pledges, outright contributions received from private sources, or activities supported by an external party (i.e., donor) in exchange for which no goods or services are expected, implied or forthcoming to the donor, and in which no proprietary interests are to be retained by the donor.

## Policy Statement

The Office of University Advancement (University Advancement) is the University's central office that leads the effort to coordinate development activities among various fundraising offices representing the University and its diverse schools, units and programs. University Advancement and all areas involved in fundraising shall strive to develop a close working relationship that ensures a coordinated effort in fundraising activities.

### 1. Responsibilities of the Office of University Advancement:

University Advancement staff shall advise and assist schools, departments or University-Associated Organizations (UAOs) in order to improve their success in securing greater private support. University Advancement provides certain core services which are essential to the stability of the University's fundraising program and schools. Foundations and units that raise money for the University and its schools will cooperate in the use of such services and will provide required information for use in the University-wide donor data base and prospect management and clearance system. University Advancement also provides advancement support related to development communications, interactive media, donor relations and stewardship, and development training. In addition, direct fundraising assistance is offered in the areas of Gift Planning (see more below), Major Gifts (Regional Development, Reunion Giving and Parent Major Gifts), Corporate and Foundation Development, and Annual Giving.

Foundations and units that raise money for the University (see [Section 2a](#)) and its schools will cooperate in the use of such services, as mutually agreed, and will provide required information for use in the University-wide donor data base and prospect management and clearance system.

Additional services are available to UAOs from the Office of University Advancement for their use as needed. The specific services utilized by UAOs are set forth and agreed to by each UAO and the University through separate Memoranda of Understanding (MOU).

### 2. University-Associated Organizations Involved in Development Activities:

A University-Associated Organization (UAO) is a tax-exempt separately incorporated 501(c)(3) nonprofit organization governed by a board with responsibility to oversee its operations for the benefit of the University of Virginia, whose purpose and mission provides the basis for its tax-exemption and its eligibility for recognition by the Board of Visitors as a University-Associated Organization. Certain UAOs were established and operate to solicit funds to financially support the University consistent with priorities set by the Board of Visitors and the President. [For more information, refer to policy [BOV-008: Relationship with University-Associated Organizations \(formerly known as University-Related Foundations\)](#).]

a. **Approved University-Associated Organizations for Fundraising Purposes:**

Gifts may be accepted for the University by University-Associated Organizations according to their corporate purposes as designated by the donor. Specific policies for gift acceptance, receipt and acknowledgement are maintained by individual UAOs. Funds payable to the Rector and Visitors received by a UAO are to be transferred in a timely manner as specified in the MOU between University Advancement and the UAO.

Those University-Associated Organizations authorized to accept funds include:

- Alumni Association of the University of Virginia, the University of Virginia Fund;
- The Alumni Board of Trustees of the University of Virginia Endowment Fund;
- Darden School Foundation;
- The Curry School of Education Foundation;
- University of Virginia Engineering Foundation;
- The University of Virginia Law School Foundation;
- The McIntire School of Commerce Foundation;
- The University of Virginia Medical School Foundation;
- Virginia Athletics Foundation;
- Miller Center Foundation;
- The College Foundation;
- The School of Architecture Foundation;
- The University of Virginia Health Foundation;
- Foundation of the State Arboretum;
- The University of Virginia's College at Wise Foundation, Inc.;
- Jefferson Scholars Foundation; and
- University of Virginia Foundation.

3. **Establishment of New Development Programs and Staffing:**

The development program of a University-Associated Organization, or of a school or unit, can **NOT** be established without the approval of the Senior Vice President for University Advancement, the President, and official approval of the Board of Visitors. The Senior Vice President for University Advancement must be informed of plans for major fundraising programs from private sources so that the range of development activities at the University is coordinated efficiently.

Any school, department, UAO, or other organization seeking to either

- start a new annual giving program, or
- conduct one or more special solicitations with a goal of \$10,000 or more,

in conjunction with their own unit fundraising staff, must receive advance approval from the Senior Vice President for University Advancement.

The Senior Vice President for University Advancement coordinates and has oversight of the hiring decisions for development professionals throughout the University. Recommendations for key personnel positions are shared with the President. These positions include:

- School and unit development/foundation directors,
- major gift directors or officers,
- corporate and foundation directors or officers,

- planned giving directors or officers, and
- special project fundraising directors or officers.

All development hiring requests should be submitted to the Senior Vice President for University Advancement for coordination with the President's Office. [For more information, refer to the [Hiring Guidelines Memo](#).]

**4. Other University Areas Involved in Development Activities:**

Non-school units (for example, the University Art Museum, the Virginia Foundation for the Humanities) may also solicit funds to financially support the University consistent with priorities set by the Board of Visitors and the President. As with University-Associated Organizations, these units will cooperate in the use of University Advancement's core services and will provide required information for use in the University-wide donor data base and prospect management and clearance system.

**5. Student Organizations Involved in Development Activities:**

Student organizations interested in raising funds to support their activities must consult policy [PRM-017: Duties Toward Speakers and Use of University Facilities or Property](#), specifically, Section 5. Limits on Advertising, Sales, and Solicitation.

**6. Support through Bequests:**

The processing of bequests to the University should be referred to the Office of Gift Planning. The Office of Gift Planning will determine in which cases the Office of the General Counsel must act on behalf of the University. Once the bequest is recorded, the Office of Gift Planning will acknowledge and steward the gift in cooperation and conjunction with University schools, units, and foundations as appropriate.

**7. Reporting to the President and Board of Visitors:**

University Advancement will advise the President of the University on matters relating to the solicitation and acceptance of private funds and shall provide the President with information concerning prospects for major gifts from private sources. The total gifts and bequests made to the University, either directly or through one of the University-Associated Organizations, from private sources shall be reported by University Advancement at least quarterly to The Board of Visitors.

**8. Compliance with Policy:**

Failure to comply with the requirements of this policy may compromise the University's fundraising efforts and donor relations and may result in disciplinary action up to and including termination or expulsion in accordance with relevant University policies.

Questions about this policy should be directed to the [Office of University Advancement](#).

**Procedures**

[Development and Investment Procedures](#)

## **Related Information**

[Prospect Management policy](#)

[EXT-008: Acceptance, Receipt and Acknowledgment of Gifts](#)

[EXT-009: Establishment of Funds from Gifts](#)

[FIN-001: Determining if an Award is a Gift or Sponsored Project](#)

[PRM-017: Duties Toward Speakers and Use of University Facilities or Property](#)

[BOV-008: Relationship with University-Associated Organizations \(formerly known as University-Related Foundations\)](#)

## **Policy Background**

The policy statement is, in part, a codification of previous understandings. Any earlier regulations in conflict with this policy statement have been rescinded and any exceptions or variations can be made only with the approval of the President and The Board of Visitors.

**Major Category** [External Relations](#)

**Next Scheduled Review** Tuesday, July 15, 2014

## **Revision History**

University-Related Foundation changed to UAO 5/10/22; Added Compliance section 12/20/21; Updated term "Gifts" 6/22/18.

## **Applies To Text**

Academic Division, the Medical Center, the College at Wise, and University-Associated Organizations.

## **Supersedes Policy Text**

IX.A.1, Solicitation and Acceptance of Gifts and Bequests

**Last modified** February 22, 2024 - 11:24am

**Approved By** Policy Review Committee

**Approved Date** July 15, 2011 - 12:00pm