



## ANNUAL GIVING SOLICITATION CLEARANCE POLICY

This policy is intended to govern all annual solicitations made on behalf of Montana State University and/or groups affiliated with MSU. Coordination of annual solicitations will serve to preserve MSU's credibility among its donors as well as to optimize resources. An annual gift is defined as a request for a gift(s) between \$1 and \$25,000 generated through an appeal (e.g., by telephone, mail appeal, e-mail, etc.) on behalf of the University's individual colleges, departments, schools, and programs. In order to limit redundancy and confusion among potential donors and in order to provide the most effective program, the following policies apply:

- All direct and indirect annual gift solicitation efforts targeting Montana State University alumni, parents, friends or other MSU affiliated entities should be submitted for approval/disapproval and coordinated (if approved) through the Office of Annual Giving. This includes direct and indirect appeals and/or appeal considerations made via telephone, letter, e-mail, newsletters, brochures, pledge cards, or any other instrument. Request should be made using the **Annual Giving Request for Solicitation** form obtained through the Office of Annual Giving or online at [www.montana.edu/foundation/links.htm](http://www.montana.edu/foundation/links.htm).
- All requests made to the MSU Foundation for labels, mailing lists, data files containing names, addresses and/or e-mail addresses of MSU alumni, parents, friends, or other MSU entities **for the purpose of direct or indirect solicitation**, will not be honored unless the requester has previously received clearance from the Office of Annual Giving.
- Fund-raising telephone campaigns, unless approved by the Office of Annual Giving, may not be conducted elsewhere on campus or through outside private or volunteer contractors.
- Colleges, departments, schools, and programs must provide the Office of Annual Giving with samples of all solicitations (e.g., letters, brochures, pledge cards, etc.).
- All funds generated through approved annual gift solicitations and returned by the donor directly to:  
MSU Foundation, Inc.  
1501 S. 11<sup>th</sup> Avenue  
Bozeman, MT 59717
- Checks should be made payable to the MSU Foundation.
- All annual gift solicitations that are cleared by the Office of Annual Giving will be tracked by a solicitation code assigned by the Office of Annual Giving.
- Annual gift solicitations made through the use of "stand alone" databases are also covered by this policy.