UNIVERSITY OF HOUSTON SYSTEM
ADMINISTRATIVE MEMORANDUM

SECTION: Advancement and Alumni **NUMBER: 08.A.01**

AREA: General

SUBJECT: Management and Development of Advancement and Alumni Activities

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1. PURPOSE

1.1. The Division of Advancement and Alumni (Development, Alumni Relations, Volunteer and Donor Engagement) interacts continuously with prospective donors, established donors and various donor and alumni groups. The purpose of this policy is to ensure compliance with Board of Regents Policy 32.01, support the priorities and initiatives of the University of Houston System and its universities, and maintain consistent representation of the System to prospective donors, established donors and various donor and alumni groups to maximize gift support to benefit the System and its universities.

1.2. For the purposes of this document, prospective donors, established donors and various donor and alumni groups include alumni, alumni associations, individuals, corporations, the System's support organizations and other volunteer groups, including the staff, officers, and/or any designated representative of such group.

2. POLICY

2.1. The Chancellor is responsible for giving broad direction to and coordinating Advancement and Alumni activities throughout the System.

2.2. Advancement and Alumni activities (development, alumni relations, gift acceptance and gift reporting, including solicitations, events, and communications) involving the System will be planned and coordinated by the Chancellor or their designee(s) and overseen by the President and appropriate professional staff at each System university. The President of each System university is responsible for ensuring that all Advancement and Alumni activities support the institution's priorities and initiatives as identified by the Board of Regents and the Chancellor.

2.3. Advancement and Alumni activities involving System administration, the System's universities, prospective donors, established donors and various donor and alumni groups, including faculty, staff, and students, are led by the Division of Advancement and Alumni through the Vice Chancellor for Advancement and Alumni and System advancement leadership.

2.4. All Advancement and Alumni activities must be conducted in accordance with applicable federal and state law and best practices through guidelines from the

Association of Fundraising Professionals and the Council for Advancement and Support of Education (CASE). To ensure the donor's intent is being satisfied, the Vice Chancellor for Advancement and Alumni is responsible for ensuring that gift agreement obligations are being met. Each restricted gift must be maintained in separate cost centers in accordance with Texas Education Code, Section 51.004 and used for the purpose intended.

2.5. Gift solicitations

2.5.1. Gift solicitations for a Leadership gift ($5 million or greater) must be developed with the involvement of System advancement leadership and approved by the Vice Chancellor for Advancement and Alumni.

2.5.2. Gift solicitations for a major gift ($25,000 or greater but less than $5 million) must be developed with the involvement of System advancement leadership and approved by the Vice Chancellor for Advancement and Alumni.

2.5.3. Gift solicitations of under $25,000 must be developed with the involvement of System advancement leadership who will review and approve any mass solicitation through established System university policies approved by the Vice Chancellor for Advancement and Alumni. This includes any solicitation campaign via telephone calls, texts, email, print or digital means.

2.6. Endowment management activities must be conducted in accordance with System Administrative Memorandum (SAM) 03.F.02.

2.7. Gift acceptance activities must be conducted in accordance with SAM 08.A.03.

2.8 ~~2.8~~. All System-wide expenditure activities must be conducted in accordance with SAM 03.A.01 Expenditure and Use of All Funds Administered by the University of Houston System.

2.9 All System-wide communications involving prospective donors, established donors or various donor and alumni groups will be coordinated through the Vice Chancellor for Advancement and Alumni or System advancement leadership designee as appropriate.

2.10~~9~~. All System-wide requests involving institutional data (alumni and donor information) will be coordinated through the Vice Chancellor for Advancement and Alumni or System advancement leadership designee as appropriate.

2.11~~0~~. The Vice Chancellor for Advancement and Alumni is responsible for ensuring the privacy and accuracy of all institutional data (alumni and donor information) contained in the Division of Advancement and Alumni's records.

3. REVIEW AND RESPONSIBILITIES

Responsible Party: Vice Chancellor for Advancement and Alumni

Review: Every five years

4. APPROVAL

Approved: ~~*/Eloise Brice/*~~
Vice Chancellor for Advancement and Alumni

~~*/Renu Khator/*~~
Chancellor

Date: ~~December 4, 2024~~