



BEULAH HEIGHTS

UNIVERSITY

Institutional
Advancement
Policy Manual

Institutional Advancement - Policies

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Private Giving Policy

Purpose: To establish donor rights

Policy

Private giving promotes Beulah Heights University's excellence in higher education. Private gifts allow the University to fund programs, ministries, scholarships, fellowships, professorships, campus renovations, and new facilities.

Beulah Heights University has also adopted the Donor Bill of Rights:

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support; it is declared that all donors have these rights.

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To be assured gifts will be used for the purposes for which they were given.
- IV. To receive appropriate acknowledgment and recognition.
- V. To be assured that information about donations is handled with respect and with confidentiality to the extent provided by law.
- VI. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VII. To be informed whether those seeking donations are volunteers or employees of the organization or hired solicitors.
- VIII. To have the opportunity for the donor's name to be deleted from mailing lists that an organization may intend to share.
- IX. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

The text of this statement in its entirety was developed by the American Association of Fundraising Counsel (AAFRC), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP). (1993)

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Gift Policy

Purpose: Provide guidelines for gifting to the university

Policy

“Tangible Gifts” shall include cash, publicly traded securities, closely held securities, real property, personal property, and other property accepted upon the recommendation of the Office of University Advancement.

“Intangible Gifts” is property that has no intrinsic value: its value results from intangible qualities rather than from specific tangible factors. Intangible gifts include copyrighted literary, musical, or artistic composition. Intangible gifts also include patent, trademark, franchise, license, method, program, system, procedure, campaign, survey, study, technical data and any similar item that has substantial value independent of the services of any individual.

Oral Pledges should not be recorded. Office of advancement should write the individual making an oral pledge to document the commitment, and place a copy in donor’s file.

Pledges of Cash should be written and should commit to a specific dollar amount that will be paid according to a fixed schedule.

Cash gifts must be hand-delivered to the Gift Processing Unit, Advancement Office, 892 Berne St., 404-627-2681 EXT. 152, along with the “Gift-to-Deposit form” on the day they are received or collected.

The Advancement Office will provide a signed receipt to the courier and proceed with processing the gift as outlined above

Gifts of property: An advancement official should document the following on all property gifts

I. Description of property

II. The purpose of the gift

III. An appraisal of the property, and if different, the University’s interest in the property’s fair market value and marketability

IV. Any potential for income and expenses, encumbrances, and carrying costs prior to disposition

V. Any environmental risks or problems revealed by audit or survey

VI. The gifts intended use by the University and its benefit to the department receiving the asset

VII. Any special arrangements requested by the donor concerning disposition, i.e., price considerations, time duration prior to disposition, potential buyer, recognition, etc.

All gifts and original supporting documentation received by faculty and/or staff must be hand delivered to the Office of University Advancement within one business day of receipt.

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Gifts-in-kind may be forwarded to the beneficiary department through departmental budgets, after the business office has deposited the gift into the University account. It is the responsibility of the department business manager to ensure that appropriate inventory measures are taken. Donor name, contact information, estimated value of gift, and receiving department shall be forwarded within one business day of receipt to the Office of University Advancement.

The Office of University Advancement will be responsible for processing gifts in the following manner:

I. Transmit check/pledge to the Beulah Heights University Treasury for deposit and transmittal to the Gift Records System called Raiser's Edge, accompanied by a completed "Gift Transmittal" form indicating the purpose of the gift and the account designation, with copies of applicable documentation.

Transmittal of Gifts by Check

Verify that the name of the University, or an appropriate abbreviation such as "BHU", appears on the payee line of the check. Note: If donors ask, suggest that specific departments or divisions be noted on the memo line of the check.

In general, checks should be endorsed by the department of advancement to ensure their safety in transit to the Gift Processing Unit. The checks should be endorsed with "for deposit only." However, if a check intended for University purposes has been written to an individual (e.g. a faculty member), that individual must endorse the check and sign it over to Beulah Heights University. If a check is made payable to a specific department or division (e.g. Chapel, religious studies, etc.), the department chairperson must endorse the check according to how it is made payable and specifically include Beulah Heights University in the endorsement (e.g. Chapel of Beulah Heights University, Library of Beulah Heights University). When checks received in the Advancement Services Office are not made payable to the University, the gift processing staff will contact the originating department for resolution.

Departments receiving gifts of checks should complete a "Gift-to-Deposit" form including the following information (incomplete forms will be returned to departments for additional information and will delay processing of gift):

I. Donor name and address

II. Gift amount

III. Account name

IV. Designation or Oracle Alias code to which deposit is to be made (Please use one deposit form for each fund/center code)

V. Indication of acknowledgement letter sent from department (strongly encouraged)

VI. Name and phone number of department contact

VII. Forward the completed form, along with the check(s), a copy of the acknowledgment letter (if available), and all original documentation received with the check, including matching gift forms, to the office of Institutional.

VIII. Retain a copy of the deposit form (and any background information you wish) for department records.

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Purpose: To establish procedures for gift acceptance

Policy

Once per week, the office of institutional advancement shall send journals of all gifts received for various courses including but not limited to: the library, central University programs, scholarships, etc to the Advancement Officer responsible for that department. The Officer will then distribute those reports to the necessary individuals.

1. **Acknowledgment of Gifts** The office of institutional Advancement issues official tax receipts as well as institutional thank you letters. Major donors receive a special letter from the president. However, gifts designated for a department should always be acknowledged by the department.
2. Prepare an acknowledgement (stewardship) letter from the President to the donor(s).
3. Notify the appropriate University department(s) and the Vice President for Administration of receipt of the gift.
4. The BHU System Donor and Alumni Records department will prepare and will mail to the donor the official receipt for the gift.
5. Each gift with a value of \$100 or more (excluding pledges) will be reported to the Board of Trustees on a Gift Report.
6. For all gifts of personal property, regardless of value, a development officer or other appropriate departmental representatives will prepare correspondence summarizing the gift and submit it to the designee. At a minimum, the summary shall include the following:
 - I. Description of asset
 - II. The purpose of the gift
 - III. An estimate or appraisal of the gift's fair market value and marketability
 - IV. The gift's intended use by the University and its benefit to the department receiving the asset
 - V. Any special arrangements requested by the donor concerning disposition, i.e., price considerations, time duration prior to dispositions, potential buyer, recognition, maintenance, storage and security etc.

Alumni Policy

Purpose: Establish guidelines for alumni information sharing and alumni privacy

Policy

GENERAL STATEMENT: Alumni information will not be released except as permitted under this policy or as required by law.

DEFINITION OF ALUMNI INFORMATION: Alumni information is defined as contact information including the name, any addresses, telephone numbers or any other information pertaining to an alumnus of Beulah Heights University, which is gathered after the individual is no longer enrolled as a student.

ACCESS AND USE OF ALUMNI INFORMATION: Only Beulah Heights University employees who have a need to know in order to perform an authorized University function or activity may access alumni information. Alumni information shall be used for alumni relations purposes and development purposes in accordance with all applicable policies.

1. Units may release information to volunteers they designate to use information for such purposes as special events, school related communications and the like.
2. Each unit is responsible for ensuring that its designated volunteers use and distribute the information in the appropriate manner for its authorized function or activity and that the volunteers understand their responsibility to maintain the confidentiality of the information pursuant to these guidelines.

RELEASE OF ALUMNI INFORMATION WITHOUT PRIOR PERMISSION OF ALUMNI: The Office of Institutional Advancement/Alumni Records Office will perform the following functions with respect to requests for alumni information without prior permission of the alumni:

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1. Forward Requests. Forward requests from an alumnus or alumna seeking the address of other alumni.
2. Associated Organizations. Alumni information may be released to organizations associated with the University, but not under Regental control, only if the organization certifies in writing that:
 - I. The Office of Institutional Advancement/Alumni Records Office will use the information only in an activity that will directly serve a function of the University. For student related organizations, the Vice President for Student Affairs or his or her designee must certify that the use of the requested alumni information will serve a University function. The office of Institutional Advancement/Alumni Records Office will have the final authority to determine if an activity will directly serve a function of the University.
 - II. It will not use the information for any other purpose.
 - III. It shall not release or disclose the information to any third party. It shall not release the information to a person affiliated with the organization unless that person has a need to know and that person agrees to maintain the confidentiality of the information pursuant to these guidelines.

RELEASE OF ALUMNI INFORMATION WITH PRIOR PERMISSION OF ALUMNI. Alumni information may be released in the following circumstances only with the prior written permission of individual alumni:

1. Shared Alumni. The Office of Institutional Advancement/Alumni Records Office will release alumni addresses and telephone numbers to other institutions of higher education on shared alumni when the alumnus or alumna whose information is being requested have given written permission to release such information.



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Beulah Heights University is a member of the **Transnational Association of Christian Colleges and Schools (TRACS)** [15935 Forest Road, VA 24551; Telephone: (434).525-9539; e-mail: info@tracs.org] **having been awarded Reaffirmation II of its Accredited Status as a Category IV institution** by the TRACS' Accreditation Commission on April 4, 2012. **This status is effective for a period of ten years.** TRACS is recognized by the United States Department of Education, the Council for Higher Education Accreditation and International Network for Quality Assurance Agencies in Higher Education (INQAAHE). Beulah Heights University is also a member of the **Association for Biblical Higher Education (ABHE)** [5850 T.G. Lee Blvd., Ste. 130, Orlando, FL 32822; Telephone: (407).207-0808; email: info@abhe.org] **having been awarded Reaffirmation of its Accredited Status as a Category IV institution** by the ABHE's Accreditation Commission on February 20, 2012. **This status is effective for a period of ten years.** The Association for Biblical Higher Education is recognized by United States Department of Education, the Council for Higher Education Accreditation and is a part of a global network that relates to regional or continental higher educational agencies through the International Council for Evangelical Theological Education.