

**Western Michigan University
Faculty Senate
Memorandum of Action**

MOA – 20/05

**Creation of Faculty Engagement in Fundraising and Development Activities
Policy**

Name of Council(s)/Committee(s):
Campus Planning and Finance Council

Approval Date:
October 20, 2020

Implementation Date:
Upon Administrative Approval

Responsible Office(s) and Responsible Enforcement Official(s):

The Faculty Senate will collaborate with the Provost and Vice President for Academic Affairs, Vice President for University Advancement, Executive Director of the WMU Foundation, and the Office of the President to implement and enforce this policy.

RECOMMENDATION:

It is recommended that a Western Michigan University policy be created to engage faculty in fundraising and development activities, including seeking faculty input into fundraising priorities and communicating with faculty about ongoing and planned fundraising activities, as well as their outcomes.

When approved, the policy established from this recommendation shall replace, in total, any understandings that had been previously derived from MOA-09/05: *Faculty Input to and Participation in the Development and Fundraising Process*. This is being put forward as a new policy rather than as a revision because the previous MOA, while approved by all parties, had never actually been incorporated into implemented policy.



October 20, 2020

Valerian Kwigizile, Chair, Campus Planning and Finance Council

Date

X Approve Disapprove Other Action

Comments:



November 5, 2020

Marilyn S. Kritzman, WMU Faculty Senate President

Date

X Approve Disapprove Other Action

Comments:



December 10, 2020

Kristen R. DeVries, Vice President for University Advancement

Date

X Approve Disapprove Other Action

Comments:



December 11, 2020

Jennifer P. Bott, Provost and Vice President for Academic Affairs

Date

X Approve Disapprove Other Action

Comments:



1/05/2021

Edward B. Montgomery, WMU President

Date

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RATIONALE/PURPOSE

As those who are responsible for providing the curriculum to benefit students and fostering the relationships that persist for lifetimes with alumni, faculty are keenly aware of opportunities to influence philanthropic activities. In addition, faculty as the drivers of research, scholarship, and creative activity are keenly aware of both challenges and opportunities for advancement of the University mission. The primary purpose of this policy is two-fold. On one hand, it clarifies the mutual understanding that administrative efforts to develop philanthropic activity and foster relationships in support of the University mission shall actively involve the faculty in the design, implementation, and reporting phases of those efforts. On another hand, this policy establishes a clear understanding that faculty acknowledge they have a role to play in fundraising and development in ways that are responsible, and are coordinated with the institutional efforts in a collaborative spirit. Faculty can also contribute to the process of identifying the potential external donors and fostering deeper relationships with them in order to further the goal of University advancement.

STAKEHOLDERS

All Western Michigan University faculty, staff, and administration.

HISTORY:

- a) Effective date of current version: n/a
- b) Date first adopted: n/a
- c) Revision history: n/a
- d) Proposed date of next review: fall 2023

PROPOSED POLICY LANGUAGE:

Western Michigan University will engage faculty in fundraising and development activities, including seeking faculty input into fundraising priorities and communicating regularly with faculty about ongoing and planned fundraising activities, as well as their outcomes.

ACTIONS

Implementation of the policy shall include the following actions:

1. At least annually, the Vice President for University Advancement will provide a summary report to the Faculty Senate (in a manner determined by the Faculty Senate Executive Board) on planned

activities including updates on capital campaigns relative to the University Advancement office. The report shall highlight all confirmed gifts of at least one million dollars, whether named or anonymous. The Vice President for University Advancement should also be extended an opportunity to participate directly, and as often as necessary, with the Campus Planning and Finance Council as determined by mutual consent.

2. At least annually the Provost and Vice President for Academic Affairs will report to the Faculty Senate (in a manner determined by the Faculty Senate Executive Board) on the priorities for fundraising and development across the various colleges, and other units in Academic Affairs.
3. The University Advancement office will seek ideas from chairs, directors, and faculty (in a manner determined by the University Advancement office) regarding initiatives for fundraising. Likewise, units will promptly inform the University Advancement office and the dean's office of any alumni outreach, newsletters, or similar efforts to engage with alumni and potential donor groups.
4. Faculty members will be invited to participate in the development and alumni relations training activities offered to chairs, directors, and deans.
5. The Faculty Senate will help facilitate the identification and recruitment of faculty to assist in development and advancement activities in collaboration with the Vice President for University Advancement, Alumni Relations, and other areas as determined by the WMU President.
6. Faculty may identify potential donors and should forward those possibilities to the University Advancement office, chair/director, and dean. Faculty should also promptly inform the chair/director (who is responsible for sending information along as needed) of any contact with potential donors. Generally, direct solicitation from, and the cultivation of relationships with, specific donors should be coordinated with the University Advancement Opportunity Teams.