**Affinity Fundraising Appeals**

**Definition**

Affinity fundraising appeals are custom digital or traditional direct response solicitations designed for small audiences. These small groups (typically less than 500 households) are assumed to have a shared affinity for the respective appeal. Affinity appeals raise money for restricted purposes.

**Proposal for Affinity Appeals**

VUMC Development’s Digital and Direct Marketing unit offers an online giving platform (see “Online Capability” below) supporting affinity fundraising appeals. The platform uses stand-alone giving pages and crowdfunding pages to provide project sponsors and donors a customized online giving experience. Initiatives are promoted by email distributions to selected recipients.

*Process*

1. Researchers Seeking Funding for Research Projects

Crowdfunding pages are most appropriate for research projects and one-time special initiatives with goals equal to or less than $25,000. Research projects must be approved by the Office of Research. All other projects must be approved by the respective division chief and department chair.

It is important to remember that VUMC Development will not provide donor lists for these affinity fundraising projects. This is because the most successful projects use social media (e.g., Facebook, Twitter, Instagram, etc.) to activate social, professional or other existing networks of individuals who have a strong common interest for a specific cause.

Specific regulation restricts fundraising by VUMC of certain groups. The following sources of potential recipients may not be used to promote these projects:

* lists of patients/patient families originating in Epic
* lists of VUMC/VU employees originating in the Outlook Exchange Global Address List or other internal data source
* lists of individuals who are research subjects

All requests for research-based affinity projects begin with the project sponsor completing and submitting the Crowdfunding Application to the Office of Research, found here: <https://redcap.vanderbilt.edu/surveys/?s=EHTPKNAKWR>

1. Complete and submit crowdfunding application form through Redcap to the Office of Research.
2. Jennifer Pietenpol, PhD, Vice President for Research, determines if the project is approved for fundraising.
3. Office of Research will notify the applicant and the VUMC Development Digital and Direct Marketing (DDM) team of the project’s approval.
	1. Collaborative, trans-institutional crowdfunding activities that involve both Vanderbilt University (VU) and Vanderbilt University Medical Center (VUMC) are handled on an individual basis by the Executive Vice President for Research in order to consider the precedents established since the separation of VUMC and VU, including trademark implications.
	2. An annual report describing funds raised and their use will be required by the Executive Vice President for Research.
4. Project applicant will meet with VUMC Development digital team to design campaign.
5. Non-research Projects

Examples of the most common non-research affinity fundraising projects include resident/fellow training and faculty tribute projects. Contributions for these projects are typically sought from former residents and fellows.

The Fundraising Initiative Form should be completed by department’s sponsoring MGO (Major Gift Officer) liaison & submitted to DDM to outline the objectives and basic information for the initiative.

* 1. Fundraising Goal Amount
	2. Fundraising Purpose
		1. Prospective Donor Group (e.g., FRFE’s, faculty, community, other)
		2. Quantity of households in prospective donor group
		3. Center/Allocation (confirm with VUMC Dev & Dept finance)
		4. Start date of initiative
		5. VUMC Development Communication notified of possible work item
	3. Approvals
		1. Approved by Division Chief, department’s director of training programs
		2. Approved by department chair
		3. Approved by sponsoring MGO liaison

After collecting this information, stakeholders will design the initiative.

* 1. Channel Selection:
1. Digital
	* + 1. Classy Page (either crowdfunding or giving page, as appropriate)
			2. Email List
				1. Sponsoring MGO requests data from Analytics with assistance of DDM
				2. The following groups clear the respective distribution list for communications conflicts: DDM, Comm, and RRM
				3. Combining lists from sources outside of the VUMC database of record, Advance, cannot be accommodated at this time
			3. Scheduling Distribution to Recipients
				1. Determined with DDM/Platform Manager given requested start/stop and current DDM calendar
		1. US Mail
			1. Sponsoring MGO:
				1. Completes data request with assistance from DDM
				2. The following groups clear the respective distribution list for communications conflicts: DDM, Comm, and RRM
				3. DDM will request appeal code
				4. Works with Comms to draft letter
				5. Sponsoring MGO administrative assistant merges, assembles and mails letters
		2. Combined Digital and US Mail
			1. Same tasks required as written but coordinated with calendar to distribute the dual channel appeal.
2. Program in Academic/Clinical Department
	1. Same as 1.
	2. Crowdfunding may be an option where a plausible case can be made that a constituency of potential supporters exists in social and professional networks.

Fundraising Initiative Request

Crowdfunding requests for research go to: <https://redcap.vanderbilt.edu/surveys/?s=EHTPKNAKWR>

**Sponsors** (Who is the person bringing this project forward?):

**Department/Division: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

□ chief of sponsoring division (name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

□ chair of sponsoring department (name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

□ major gift officer liaison (\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

**Fundraising Goal (if any):** $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Fundraising Purpose:**

How will the money raised be used? ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What is the Center/Allocation designation for this initiative?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ This allocation currently exists □ This allocation must be approved and created

Who are the prospective donors? To whom will this appeal be directed?

□ Former Residents and Fellows

□ Community

□ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many households are in this prospective donor group? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is the desired start date for the initiative? Start Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Additional details pertinent to this fundraising effort:

Date submitted: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_