



University Advancement Style and Standards Policy	
Responsible Official: Vice President for University Advancement	Responsible Office: University Advancement

Policy Purpose

The purpose of this document is to provide guidance and examples for preparing communication materials in support of the University Advancement mission.

Policy Statement

Authority: University Relations Style and Graphic Standards Manual
Vice President for Advancement

Definitions

N/A

History

Effective Date: 10/12/2017

Revision Date: 1/15/2019

Revision Notes. This revision adds our second social media channel (Instagram), updates the voice used in paragraph IV, discusses our use of boosted/paid content, and removes an attachment previously included in error.

Procedure (s)

Attachment:

Banner Advancement Standards

- I. **Background.** Advancement staff should familiarize themselves with ETSU style by reading the Style and Graphic Standards Manual (available from the University Relations website). In cases where this policy may conflict with that, follow the University standards.
- II. **General Communications:**
 - A. When referring to an academic or fiscal year, use “2016-17” (omitting the second instance of “20”).
 - B. Unless talking about the operation of the ETSU Foundation itself, use university terms when communicating with donors. For example, “We request your support of ETSU...,” “ETSU appreciates your support,” “Thanks for supporting students,” etc.
 - C. Use a comma after the second item (or more) in a series.
 - D. Use “ensure” unless you’re talking about purchasing a policy (insure).

III. **Direct Mail/Email (Annual Fund):**

- A. Each piece should feature a student/faculty member/alumnus/building from the respective unit whenever possible, giving their name and basic information (get permission from the student).
- B. Letters should be as dynamic as possible, balancing cost and purpose and should make use of italics, underlining, and a P.S. element.
- C. Each solicitation piece should include (at minimum) one ask and an equal number of “thank yous.”
- D. Include link to the giving website for matching gift information.
- E. Include links to the on-line giving form and/or matching giving, and contact info for the respective DoD or Annual Giving.
- F. Include a reply vehicle, customized for the unit, as appropriate.
- G. Outer envelopes have two functions:
 - a. Contain the information being sent.
 - b. Get the addressee to open the letter. Use “teaser” copy/graphics to make the letters more noticeable and encourage interest.
- H. Beginning in 2017-18, we transitioned away from paid return envelopes, replacing them with self-addressed envelopes. Postage could represent donors’ first “gift.”
- I. Omit titles. Instead, use the donor’s first name, the spouse’s first name, the donor’s last name, and the spouse’s last name (if different). For one-to-one correspondence, you may use titles but only after confirming you know how the recipient prefers to be addressed.
- J. When using a standard windowed envelope with customized addresses, ensure the address begins at 62mm from the top of the page and end at 84mm from the top. Letters should maintain a 1-inch left margin.

IV. **Social Media.** Our primary social media channel will be Facebook, followed by Instagram.

- A. Content will follow the themes of:
 - 1. Providing content money cannot buy.
 - 2. Providing experiences not available from other pages (news, events, calendars)
- B. Our focus will be on:
 - 1. Students.
 - 2. Stewardship (saying “thank you”).
 - 3. Impact.
 - 4. NOTE: some posts will have a solicitation component, but the majority will not.
- C. Pages/posts will include social media “Donate” buttons, which point to our giving page.
- D. Include contact information for visitors to reach out to us through means other than social media.
- E. We will add friends/followers by “boosting” content or using paid ads to those with an ETSU-affinity.
- F. The ETSU Giving page will be available for fundraising efforts from all areas of Advancement.

Related Form(s)

N/A

Scope and Applicability

	Governance	
	Academic	
	Students	
	Employment	
	Information Technology	
	Health and Safety	
	Business and Finance	
	Operations and Facilities	
	Communications & Marketing	
X	Advancement	

Attachment – Banner Advancement Standards

Various name fields will be populated in Banner according to the guidelines set forth below:

1. Address Name (APANAME). First Name, Middle Name, Last Name, Suffix – include punctuation, do not include prefix. For example, William John Smith, Jr. or William J. Smith, Jr. (if no full middle name is available).
2. Gift Society Name (APANAME).
 - a. If un-married/partnered, Prefix, First Name, Middle Name, Last Name, Suffix – include punctuation. For example, Mr. William John Smith, Jr. or Ms. Margaret Jane Jones.
 - b. If married/partnered, Mr. & Mrs. William John Smith, Jr.; Dr. & Mrs. William John Smith, Jr.; Mr. William John Smith & Ms. Margaret Jane Jones; Ms. Margaret Jane Jones & Ms. Sarah Brown Jones; Mr. William John Smith & Mr. Thomas Robert Black; Dr. Margaret Jane Jones & Mr. William John Smith; Dr. Margaret Smith & Mr. William Smith; and Dr. Thomas John Smith & Dr. Margaret Jane Jones.
3. Combined Address Name (APANAME)(same as Gift Society Name)
4. DPT Name (APAMAIL, Salutation Tab). Name as requested for plaque will be published name unless otherwise requested.
5. DPT Sort Name (APAMAIL, Salutation Tab). Name for DPT program alphabetization purposes only
6. Expressed donor preference will supersede all APANAME and Salutation guidelines.
7. Expressed donor preference should always be noted via an alert (AUAALRT), so future changes are not “corrected” back to standard.