



Governance of Fundraising and Gift Acceptance Activities

- 7.00 Fundraising and gift acceptance activities shall be informed by the university's strategic and operational planning and carried out in accordance with professional fundraising codes of ethics, and with sensitivity and respect for donors.
- 8.00 The university's fundraising and gift acceptance activities shall be coordinated in a manner that serves the best interest of the university and supports the university's priorities to the fullest extent possible.



- 22.00 To assist in recovering the costs associated with fundraising, the university may charge a levy against certain Gifts made through the Annual Giving office subject to due diligence reporting on levy amounts to the Board of Governors.
- 23.00 The university may refund a Gift if the conditions in the associated procedures are met.
- 24.00 The university is grateful for all Gifts offered, but will not accept Gifts that are unlawful or result in an abridgement of its academic freedom, autonomy, or integrity, and reserves the right to decline a Gift for any reason in its sole discretion, including but not limited to:
- a) the Gift could reasonably compromise the university's public image or reputation;
  - b) the Gift will be difficult or costly to administer;
  - c) the Gift exposes the university to unacceptable risk;
  - d) the donor applies unacceptable restrictions or conditions on the Gift;
  - e) the Gift conflicts with university policy.
- 25.00 Acceptance of a Gift is not final until it is approved by the requisite university approval authority.

#### Donor Recognition

- 26.00 Public recognition by the university for Gifts will be accorded based on the level of the Gift and will be designed taking the donor's wishes into account.

#### Management of Donor Information and Confidentiality

- 27.00 The university will respect all donor requests for anonymity to the extent legally possible.

- 28.00 The university shall collect, use, maintain, store, disclose and dispose of donor

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9.00 For all other Gifts that may potentially total \$25,000 or more, or may meet any criteria for non acceptance (see section 24 of the Fundraising and Gift Acceptance Policy (ER4105)), pre-approval must be obtained in writing from the Director of Fundraising or the Director of Principal Gifts and Campaigns, and the Dean<sup>1</sup> prior to any discussions with the donor.

9.01 Deans will keep the Vice-President Academic and Provost apprised of fundraising and gift acceptance activities.

9.02 For Gifts over \$500,000, pre-approval must also be obtained from the final approval authorities listed in [Appendix A](#).

Gift approval

10.00 Gift acceptance approval authorities have been delegated as outlined in [Appendix A](#).

11.00 The gift acceptance approval authorities must be:

- a) assured the university can meet its obligations within the terms of the Gift;
- b) confident that the donor can meet their obligation;
- c) assured that the terms of the gift comf mf edashoavacoegiftuption1.0 T,5.(ac)0 Tc 0 Tc 0.0.

- b) a section describing “the story behind the Gift” ;
- c) a section outlining the terms/purpose of the Gift;
- d) a section allowing the university to amend the terms/purpose;
- e) a section outlining the payment plan;
- f) a section containing two university signatures and at least one donor signature.

17.00 All gift agreements must be submitted to the Donor Relations office for initial review prior to any signatures.

18.00 The Donor Relations office is responsible for ensuring that all gift acceptance approvals are received and that all gift agreements are signed by the appropriate individuals using the approval tracking document.

19.00 The Donor Relations office is responsible for ensuring that gift agreement templates and subsequent revisions are reviewed and approved by the university’s General Counsel.

Legal review

20.00 If legal review is not specifically required as outlined in [Appendix A](#), and the terms of the Gift are considered straightforward by the Development Office, then legal review is not required.

21.00 If legal review is required as outlined in [Appendix A](#).



27.01 If the communication plan includes a press release, the press release must be pre-approved by the communication off ( )0.8 740.93at

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APPENDIX A

Gifts up to and including \$1 0,000

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New Student Awards	BOG	upon recommendation of Senate per policy AC1130 "Student Awards Committee on Awards"	Senate Committee on Awards	As needed	Yes (signatory Dir Adv Dc-2.7 Svs)
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Gifts in excess of \$1,000,000 up to and including \$5,000,000

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Library Gifts in-kind	BOG upon recommendation by President	Librarian	Yes	Library donation form
All other gifts	BOG upon recommendation by President	-	Yes	