	Policy No.	Replaces	Policy
	<b>E. 302</b>	<b>ARM 1119</b>	<b>Executive</b>
	Policy Name		
<b>FUNDRAISING POLICY – CAPILANO UNIVERSITY FOUNDATION</b>			
Approved by	Responsibility		Category
<b>Executive</b>	<b>Director, Dev. &amp; Alumni Relations</b>		<b>General</b>
Date Issued	Date Revised	Revision	Related Policies, Reference
<b>April 10, 2006</b>	<b>Feb. 25, 2009</b>	<b>2</b>	<b>ARM 1118, 1127, 5511</b>

## PURPOSE

Capilano University engages in fundraising activity that will enhance its mission of enabling student success. Fundraising is becoming increasingly important. Activity in this area must be carried out with sensitivity, with respect for donors, and in accordance with ethical practices in the fundraising profession.

The office of Development is responsible for the administration and coordination of all fundraising activities for the University including:

- Capital campaigns
- Annual giving campaigns
- Special project campaigns
- Major gifts
- Planned gifts
- Special Events
- Grant writing
- Corporate sponsorships

### Approval for Fundraising Plans

The University Board shall approve fundraising activities for projects or campaigns in excess of \$500,000 on the recommendation of the President

The President shall approve fundraising activities for projects from \$100,000 to \$499,000 on the recommendation of the Director of Development in consultation with the Executive.


The Director of Development and the appropriate Vice President, in consultation with the Dean, can approve fundraising activities for projects from \$15,000 - \$99,000.

Departments can initiate projects from \$2,000 - \$14,999 on approval by the appropriate Dean or Director, and in consultation with the Office of Development.

Approval of fundraising activities for projects under \$1,999 may be initiated by departments upon simple notification of the Dean or Director and the Office of Development, upon donor clearance.

### Criteria for Fundraising Approval

Fundraising approval shall be determined on an evaluation of the following factors:

	Policy No.	Replaces		Policy
	<b>E. 302</b>	<b>ARM 1119</b>		<b>Executive</b>
	Policy Name			
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- The priority of the project to be funded within a department's plan and the overall institutional strategic plan.
- Availability of an appropriate prospect pool for solicitation.
- Total amount to be raised.
- Whether the project to be funded requires other institutional funds to ensure its viability.
- The availability of resources within the Office of Development to assist with fundraising for the project.
- The department's financial commitment to the project from its existing operating budget.
- The department's financial and human resource commitment to the fundraising process for a particular project.
- Whether the project requires additional space on campus or other requirements beyond what is already allotted to the particular department.

#### **Approval for Donor Approach**

Capilano University values its donors and wishes to protect them from multiple approaches by the University community. Donor approach clearance provides such protection and is critical to the institution's ability to maximize fundraising for its top priorities. Clearance procedures apply to all donors and potential donors to the University, and all individuals and departments engaged in fundraising activities for the University. Contact the Director of Development for donor clearance.

Criteria for clearance decisions include:

- Current potential/status as a prospective donor.
- Capilano University affiliation.
- Known or possible interest in a particular area of the University.
- The donor's giving record to the University.
- Current cultivation and solicitation activity.
- The amount to be requested.
- The purpose and priority of a project for which a donor is solicited.
- The donor's giving record external to the University.
- A corporate donor's donations program and budget.