

## PROJECT CLEARANCE POLICY

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SCOPE	All departments and employees
CONTACT	Director of Advancement, Advancement Office
APPROVED BY	Board of Governors
DATE APPROVED	March 6, 2014

### 1 PURPOSE

It is imperative that fundraising efforts be coordinated at the University of King's College in a manner that serves the best interest of the institution as a whole and supports the university's priorities to the fullest extent possible. Coordinated fundraising efforts can strengthen the university's ability to conduct research, to provide excellent teaching, and to enhance the quality of student life.

### 2 SCOPE

The Project Clearance Policy is applicable to any individual or group that is associated wholly or in part with the University of King's College and is engaged in fundraising activities that benefit the university.

### 3 POLICY

#### **a) University priority projects**

##### *Identification:*

At appropriate intervals, the university shall engage in strategic institutional planning processes (strategic plans) involving consultation with representatives from all university constituencies, students, faculty, administration, alumni, and the board. Fundraising priorities shall be identified through such processes and outlined in strategic reports such as academic plans, space plans, and research plans.

##### *Approval:*

Once identified, the fundraising feasibility of these projects shall be considered by the Advancement Committee and the Advancement Committee shall make recommendations to the Board of Governors for approval as institutional priorities.

##### *Example:*

Large capital projects, such as residences or major additions and renovations to existing buildings. Major academic program support, such as funded chairs, professorships and fellowships. Major initiatives to provide student assistance, such as targeted scholarships and bursaries.

#### **b) Other university projects**

##### *Identification:*

From time to time, capital and programmatic needs arise that are not identified as institutional priorities. Projects may also develop through faculty, student or alumni interests. All such projects shall be brought to the attention of the Director of Advancement.

*Approval:*

Once identified, the Director of Advancement shall bring these projects to the President and, if the President so recommends, to the Advancement Committee. The fundraising feasibility of these projects shall be reviewed by the President and, if the President so recommends, the Advancement Committee shall determine clearance.

*Example:*

Facilities upgrades and specific program support.

**c) University community projects**

*Identification:*

From time to time, special projects are initiated by faculty, staff, individual students, student societies, athletic teams, and alumni groups. All projects of this nature that require fundraising shall be brought to the Director of Advancement for clearance.

*Approval:*

Once identified, the fundraising feasibility of these projects shall be considered by the Director of Advancement who shall give approval, or consult with the President and/or Advancement Committee as necessary.

*Example:*

Fundraising drives for material purchases to augment student societies, student spaces, student achievement, student performances, etc.

**4 GUIDELINES**

The Advancement Office shall be responsible for the planning, coordination and delivery of all institutional fundraising projects and activities.

Coordination of projects requiring private support shall meet the following requirements:

- a) individuals or groups contemplating a fundraising project are to contact the Advancement Office;
- b) when a fundraising project has been approved by the Advancement Office in consultation with the President and/or the Advancement Committee, the individual or group and the Advancement Office shall jointly plan the fundraising activities to be undertaken;
- c) when a fundraising project has been approved, any solicitation of corporations, foundations, or individuals shall conform to the university's Prospect Clearance Policy, as managed by the Advancement Office;
- d) draft fundraising materials such as brochures and letters shall be reviewed and approved by the Advancement Office prior to production and distribution.

The university's name shall not be used directly or by association to fundraise for any purpose, without the university's consent.

**5 RELATED POLICIES**

Gift Acceptance Policy

Naming Policy

Prospect Clearance Policy