



Title:

Number: **A 9**

DONOR ENGAGEMENT

Approval Date: January 20, 2016

Revision Date:

Purpose:

To ensure there is close coordination of all fundraising efforts and consistent messaging to donors and the public regarding fundraising activities and goals, and that gifts/donations are utilized and recognized in a manner that respects both the donor's wishes and the organization's values.

Fundraising activities may be undertaken by the organization directly or through the Board of Directors, or in combination. Dependent on where the activities are initiated, the approval process may differ.

Policy:

1. No fundraising project or solicitation shall be undertaken without the knowledge and approval of the Executive Director **(in the case of fundraising proposals initiated by staff)** or the Board of Directors **(in the case of fundraising activities initiated by the Board)**.
2. When a fundraising project or solicitation has been approved, the fundraising activities to be undertaken will be in conjunction with the Executive Director, Board Chair, or delegate.
3. No approaches to donors shall be made without having established with the Executive Director, Board Chair, or delegate, that the approach and the amount/type of gift being sought are appropriate.
4. All fundraising materials such as brochures, letters, emails, etc. must be reviewed by the Executive Director, or delegate.
5. The Board of Directors, or its designate, may decline any gift if the Board, in its absolute discretion, determines that declining the gift is in the best interests of the organization.