


<p><b>Name of Policy:</b> <b>Philanthropic fundraising activities and request for gifts.</b></p> <p><b>Policy Number:</b> 3364-55-04</p> <p><b>Approving Officer:</b> Vice President for Institutional Advancement</p> <p><b>Responsible Agent:</b> Vice President for Institutional Advancement</p> <p><b>Scope:</b> All University of Toledo Campuses</p>	 <p><b>Revision date:</b> April 27, 2011  <b>Initial effective date:</b> May 1, 2008</p>
<p><input type="checkbox"/> New policy proposal</p> <p><input checked="" type="checkbox"/> Major revision of existing policy</p>	<p><input type="checkbox"/> Minor/technical revision of existing policy</p> <p><input type="checkbox"/> Reaffirmation of existing policy</p>

(A) Policy statement

The vice president for Institutional Advancement shall review and authorize, for approval of the president, any philanthropic fundraising activities and request for gifts by external or internal individuals and organizations. Furthermore, the vice president for Institutional Advancement shall review and authorize, for approval of the president, capital campaigns by internal units and organizations designed to solicit large groups of alumni and supporters. The president or designee shall provide procedures for the request of gifts and/or funds by any individual, organization, department, school, college, or division for any purpose connected with the University.

(B) Purpose of policy

The purpose is to ensure that philanthropic fundraising activities and strategies are organized, avoid duplication, and maximize private financial support to the University.

This policy provides the procedures for philanthropic fundraising activities and request for gifts by external and internal organizations and individuals, and identifies the responsible parties for authorization and approval of such activities.

(C) Procedures

(1) Internal:

- (a) The vice president for Institutional Advancement directs and supervises the Office of Development to plan, coordinate, and implement all philanthropic fundraising activities for the University.
- (b) The vice president for Institutional Advancement or designee must approve and authorize the solicitation of philanthropic support from individuals, corporations, and foundations prior to any effort or action to contact or solicit such support.

(2) External:

- (a) The University will permit a single joint fund raising campaign (the United Way Campaign) where United Way, Community Health Charities of Ohio, Northwest Ohio Community Shares and Earth Shares of Ohio, using the existing United Way structure, will solicit gifts in support of the charities they represent using the process outlined below. United Way will serve as the “lead” organization.
- (b) The campaign will use the time period, process, structure and organization established by United Way. The structure will include United Way’s e-pledge process to incorporate all participating organizations. The participating organizations are charged to develop the processes necessary to expand the e-pledge system.
- (c) The University reserves the right to review and approve as appropriate all campaign literature. United Way, in cooperation with Community Health Charities of Ohio, Northwest Ohio Community Shares and Earth Shares of Ohio will share expenses for executing the campaign, including technology and literature development.
- (d) As lead organization, United Way, in cooperation with Community Health Charities of Ohio, Northwest Ohio Community Shares and Earth Shares of Ohio, will develop a campaign plan outlining process, timetable and printed and electronic communications. This plan will be presented to the University for approval.

<p>Approved by:</p> <p><u>/s/ C. Vernon Snyder</u> Vice President for Institutional Advancement</p> <p><u>April 27, 2011</u> Date</p> <p><i>Review/Revision Completed by:</i> <i>Institutional Advancement</i></p>	<p>Policies Superseded by This Policy:</p> <ul style="list-style-type: none"> <li>• <i>Previous 3364-55-04 Philanthropic fundraising activities and request for gifts, previous effective date May 1, 2008</i></li> </ul> <p>Initial Effective Date: May 1, 2008 Review/Revision Date: April 27, 2011 Next review date: April 27, 2014</p>
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