


<b>Name of Policy:</b> <b>Philanthropic fundraising activities and requests for gifts</b>			
<b>Policy Number:</b> 3364-55-04		<b>Effective date:</b> September 15, 2023	
<b>Approving Officer:</b> President		<b>Original effective date:</b> May 1, 2008	
<b>Responsible Agent:</b> Vice President for Advancement			
<b>Scope:</b> All University of Toledo campuses			
<b>Keywords:</b> request for gifts, solicit			
	New policy		Minor/technical revision of existing policy
	Major revision of existing policy	X	Reaffirmation of existing policy

(A) Policy statement

The vice president for 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 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 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 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 fundraising 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 in this rule. 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><b>Approved by:</b></p> <p><i>/s/</i></p> <hr/> <p>Gregory Postel, MD President</p> <p><b>Date:</b> September 15, 2023</p> <p><b>Review/revision completed by:</b></p> <ul style="list-style-type: none"><li>• <i>Vice President for Advancement</i></li><li>• <i>Senior Leadership Team</i></li></ul>	<p><b>Policies superseded by this policy:</b></p> <ul style="list-style-type: none"><li>• <i>None</i></li></ul> <p><b>Original effective date:</b> <i>May 1, 2008</i></p> <p><b>Review/revision date:</b> <i>April 27, 2011</i> <i>July 20, 2020</i> <i>September 15, 2023</i></p> <p><b>Next review date:</b> <i>September 15, 2026</i></p>
---	--