



<b>Policy Name:</b>	<b>Internal Fundraising Policy</b>
<b>Originating/Responsible Department:</b>	<b>University Advancement</b>
<b>Approval Authority:</b>	<b>Senior Management Committee</b>
<b>Date of Original Policy:</b>	<b>June 2007</b>
<b>Last Updated:</b>	<b>December 2017</b>
<b>Mandatory Revision Date:</b>	<b>December 2022</b>
<b>Contact:</b>	<b>Chief Advancement Officer</b>

## **Policy**

The Department of University Advancement is exclusively mandated to raise philanthropic funds for Carleton University from individuals, corporations and foundations, is solely responsible for issuing all official charitable tax receipts for gifts to the University and is authorized to approve any campaign requiring University resources in support of a non-Carleton charity.

As a matter of policy, the University supports two primary annual philanthropic on-campus campaigns, in the following order of priority:

- the Carleton Campus Community Campaign, and
- the United Way.

Outside of these two campaigns, and subject to approval by the Chief Advancement Officer, other units and departments may mount an on-campus fundraising campaign for a Carleton fund or a non-Carleton charitable organization if approval is granted by the Chief Advancement Officer.

In addition, University Advancement is authorized to approve all university-wide campaigns that require Carleton to commit human or financial resources but are focused on raising funds for non-Carleton priorities.

## **Purpose**

The purpose of this policy is to ensure that Carleton University remains an active and committed member of the community with focused appeals for fundraising campaigns that align with the University's mission and vision without diluting centralized fundraising efforts and ensuring that the main philanthropic business of the University supports Carleton's own priorities.

## **Scope**

This policy applies to all academic and non-academic departments and employees at Carleton University but is not intended to cover proposals by individual researchers or networks to philanthropic foundations which typically fund research initiatives.

## **Procedures**

All requests for fundraising campaigns must be submitted to the Chief Advancement Officer by an authorized Carleton University employee at least one month in advance of the campaign. All requests must include an explanation of why, how, where, when and by whom the fundraising will be done.

The Chief Advancement Officer shall be responsible for determining the legitimacy of each fundraising initiative – in consultation with the Senior Management Committee when required – to ensure that it is not in conflict with other institutional objectives and will approve or deny approval for the effort within ten days of receiving the request. No commitments or plans should be initiated until this approval has been secured.

As a matter of practice, a proposed fundraising initiative whose mission is already supported by another local, provincial or national body will not be approved. The Chief Advancement Officer will demonstrate a preference for one-time, non-recurring, extraordinary efforts rather than annual campaigns.

## **Contacts**

Chief Advancement Officer, Department of University Advancement  
Director, Advancement Services, Department of University Advancement

## **Links to Related Policies**

Gifts in Kind Policy

<https://carleton.ca/secretariat/wp-content/uploads/Gifts-In-Kind-Policy.pdf>

Gift Acceptance Policy

<https://www.carleton.ca/secretariat/wp-content/uploads/Gift-Acceptance-Policy.pdf>