

TRINITY INTERNATIONAL UNIVERSITY

TIU POLICY: Fundraising Approval Policy

TIU POLICY #: P-502

STATUS: Approved, September 2013
Updated, August 2015

I. PURPOSE:

The purpose of this policy is to resource the mission of Trinity International University (University) by:

1. Ensuring that the mission of the University is preeminent in any fundraising activities at the University or on behalf of the University;
2. Ensuring that the highest professional, legal, and ethical standards are met in any fundraising activity;
3. Maximizing the potential of success in all fundraising activities;
4. Stewarding relationships with donors well.

II. SCOPE:

This policy applies to all members of the University community.

III. POLICY:

Fundraising is defined as the activity of soliciting and collecting financial support for any program, initiative or activity. All members of the University community must receive approval for all formal and/or informal fundraising projects prior to making any contact with current or prospective donors. The following steps must be followed by a sponsor in order for a fundraising project to be approved:

1. Complete the Fundraising Proposal Form ([Form 502-A](#)).
2. Forward a copy of Form 502-A to the University Leadership Team (ULT) representative from their area. The ULT representative can approve the proposal, deny the proposal, table the proposal, or recommend changes.
3. If the ULT representative approves the proposal, a copy will be sent to the Chief Advancement Officer (CAO) for review.

4. The CAO and the ULT representative will meet to discuss the proposal. When both are in agreement that the proposal fits within the University's strategic plan, and/or is an institutional priority, they will bring the proposal to the President for review.
5. The President will approve, deny, table, or recommend changes to the proposal.
6. If approved, the sponsor will work in collaboration with University Advancement to plan and execute the project.

University Advancement will oversee all approved fundraising projects, but will determine the level of institutional resources that can be committed to the project.

Any member of the University community who receives (or expects to receive) a charitable contribution to the University (including cash, checks, securities, property, written intentions to give, etc.) must notify University Advancement immediately. All letters, e-mails, certificates, intentions to give, or other documents relating to contributions, including the envelope in which it arrived with post-marks intact, should be saved and forwarded to University Advancement. If a charitable contribution is received for an unapproved project the steps outlined above must be completed prior to the contribution being processed. This is to ensure that all contributions and donor relationships are stewarded according to the highest professional, legal, and ethical standards.