

Policy

FUNDRAISING AND GIFT ACCEPTANCE POLICY

Number: ER 1

Classification: External Relations

Approving Authority: Board of Governors

Designated Executive Officer: Vice-President,
Research and Innovation

Effective Date:

Supersedes: Donation of Land (1993);
Generation and Submission of Funding
Proposals Policy (1993); Donor Recognition
Policies and Procedures (1993); Guidelines and
Policies for the Receipt of donations for
Scholarships and Bursaries Policy (1993);
Internal Procedure for Recording and Reporting
of Gifts and Donations Policy (1993); Internal
Procedures for the Receipt and Notification of
donations/Sponsorships Received by the
University Through the Development Office
(1995); Non-Sanctioned Fundraising Activities
Policy (1993); Planned Giving Program Policy
(2000)

Acceptance of Gifts and Donations to the
Geoffrey R. Weller Library (2003)

Date of Last Review/Revision: February 2024

Mandated Review Date: February 2031

Associated Procedures: ER 1.1 Fundraising and Gift Acceptance Procedures

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1.0 PURPOSE

The purpose of this policy is to outline the principles that guide fundraising and gift acceptance at the University.

2.0 PRINCIPLES

- 2.1 UNBC is a registered charity that welcomes gifts from donors that support its mission, vision, and values.
- 2.2 Guided by internationally accepted principles of fundraising, UNBC engages in fundraising activities to support its mission, vision, and values and respects the wishes of donors while complying with relevant legislation and regulatory standards, and University priorities.

3.0 SCOPE

- 3.1 This policy applies to all members of the UNBC community and all fundraising and gift acceptance activities across all UNBC campuses.
- 3.2 This policy does not apply to non-philanthropic grants, contracts, or other contributions.

4.0 DEFINITIONS

- 4.1 **Gift** means a voluntary transfer of property by a donor to the University without compensation to the donor or designate.
- 4.2 **UNBC Community Member** means all employees and students of the University, and any other person who has a University appointment such as a post-doctoral fellow, a member of the Board of Governors or Senate, an Adjunct Faculty member, and Student-Led Organizations (e.g., clubs) that are not registered societies, or organizations affiliated with the University.

5.0 POLICY

- 5.1 The University endeavors to avoid subjecting donors to multiple gift requests by University community members; therefore, all fundraising at UNBC must be coordinated through the Office of Research and Innovation to ensure donors and potential donors are approached in a coordinated, consistent, and respectful manner.

- 5.2 The Vice-President, Research and Innovation (VPRI) and the Office of Research and Innovation (ORI) are responsible for the fundraising strategy, activities related to fundraising and sponsorship, and activities related to gift acceptance.
- 5.3 Fundraising reflects the University's established fundraising goals which will be consistent with the UNBC Strategic Plan.
- 5.4 Gifts may be in many forms, including but not limited to:
 - 5.31 Cash or cash equivalents
 - 5.32 Publicly traded securities or shares in mutual funds
 - 5.33 Bequests and Charitable Remainder Trusts
 - 5.34 Life insurance policies
 - 5.35 Real estate
 - 5.36 Gifts-in-kind (e.g., artwork, equipment, book collections)
- 5.5 The University does not provide any legal, accounting, or financial advice to donors with respect to gifts.
- 5.6 The University does not act as executor of a donor's estate or trustee of a living trust.
- 5.7 The University cannot accept gifts that are unlawful, not aligned with University policy, or impinge upon academic freedom, the University's autonomy or integrity. The University has the right and sole discretion to decline any gift for any reason. Reasons include, but are not limited to, the following:
 - 5.7.1 the gift could compromise the University's image or reputation;
 - 5.7.2 the gift could be difficult or costly to administer;
 - 5.7.3 the gift exposes the University to unacceptable risk;
 - 5.7.4 the donor desires unacceptable restrictions or conditions.
- 5.8 Accepted gifts bring value to the University and must be properly valued for tax and insurance purposes.
- 5.9 The President has final approval authority for the University's fundraising activities and may delegate responsibility for fundraising activities.
- 5.10 Final approval authority for gifts is as follows:

5.9.1 Gifts in excess of \$5,000,000	Board of Governors
5.9.2 Gifts between \$1,000,000 and \$5,000,000	President and Vice-President, Research and Innovation
5.9.3 Gifts \$500,000 to \$999,999	Vice-President, Research and Innovation and one of Vice-President, Academic or Vice-President, Finance and Administration
5.9.10 Gifts \$0 to \$499,999	Vice-President Research and Innovation. Authority for approving gifts of this size may be delegated to employees within the Office of Research and Innovation.

5.11 Pre-approval authority for specific gifts-in-kind is as follows:

6.1.1 Gifts-in-kind to the Geoffrey R. Weller Library	University Librarian or delegate
6.1.2 Gifts-in-kind of artwork	Office of the President

- 5.12 The University respects the wishes of donors for gifts to be used for specific purposes providing the purpose is consistent with UNBC's mission, vision, and values, and is consistent with this and other relevant policies.
- 5.13 When circumstances change and the gift cannot be used for its designated purpose, the University works with the donor when possible to change the terms of the gift or use its discretion to change the terms.
- 5.14 Unrestricted gifts may be allocated by the President or their designate to support University priorities.
- 5.15 Gift agreements are created between the donor and the University as required in the *Fundraising and Gift Acceptance Procedures*.
- 5.16 The University recognizes Gifts according to the level of the gift and in alignment with the donor's wishes.
- 5.17 UNBC respect donors' requests for anonymity to the extent legally possible.

- 5.18 The University collects, uses, stores, and disposes of donor information in compliance with the *Freedom of Information and Protection of Privacy Act* requirements and the University's policies and procedures.

6.0 REPORTING

The Vice-President, Research and Innovation is responsible for reporting on fundraising priorities, activities, and gift acceptance at least annually to the Board of Governors.

7.0 AUTHORITIES AND OFFICERS

The authorities and officers for this policy are as follows:

Approving Authority: Board of Governors

Designated Executive Officer: Vice President, Research and Innovation

Procedural Authority: Vice-President, Research and Innovation

Procedural Officer: Director, Research and Innovation

8.0 RELEVANT LEGISLATION

8.1 [University Act](#)

8.2 [Income Tax Act](#)

8.3 [Freedom of Information and Protection of Privacy Act](#)

9.0 RELATED POLICIES AND OTHER ASSOCIATED DOCUMENTS

9.1 UNBC Strategic Plan

9.2 *Naming of Physical Assets Policy and Procedures*

9.3 *General Research Policy and Procedures*

9.4 *Protection of Privacy Policy*