



**HOW THE RIGHT**  
**PRINCIPLES, POLICY**  
**AND PRACTICE**

**ENSURE VALUES-DRIVEN ADVANCEMENT**  
**AT TODAY'S UNIVERSITIES**



## A PROFESSIONAL MINDSET

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**Philanthropy is a voluntary exchange in which the values and aspirations of donors are matched with the values and aspirations of those they benefit. Educational fundraising professionals work on behalf of those served by their institutions during this exchange of values and represent their universities, colleges and schools to donors, volunteers, and the larger public. ...**

”

– CASE Board of Directors, July 2014

## A PROFESSIONAL MINDSET

“

**... In doing so, they also represent the integrity of the institution and of the fundraising profession. They must, in discharging responsibilities, observe and promote the highest standards of personal and professional conduct and continually strive to increase their knowledge of the profession.**

”

– CASE Board of Directors, July 2014

# PROFESSIONAL PRACTICES

## **Council for Advancement and Support of Education (CASE)**

Pursue only gifts that fall within, or advance, the institution's mission and/or approved priorities.

Ethical principles re: personal integrity, confidentiality, public trust, disclosure, compensation

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## **Canadian Council for the Advancement of Education (CCAIE)**

Canadian context to global initiatives

Promotes certifications

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## **Association of Fundraising Professionals (AFP) / Certified Fund Raising Executive (CFRE)**

Professional certification

Donor Bill of Rights

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## **Educational Advisory Board (EAB)**

Peer information and comparators

Research-driven

## U OF S POLICIES AND PROCEDURES

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Gifts may not be accepted if the donor places parameters on the gift which do not meet University policy or fit with University priorities. Ownership of all gifts directed to the University vest in the University. The final decision to accept or decline a gift rests with the Board of Governors.

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**Gift Acceptance Policy** (overseen by UR)

<https://policies.usask.ca/policies/advancement/gift-acceptance.php>

## U OF S POLICIES AND PROCEDURES

“

The University may elect to accept or decline any gift. The final decision to accept or decline a gift rests with the Board of Governors. Ownership of all gifts directed to the University vests in the University, whether said gifts are for the benefit of the University generally or for some specific purpose.

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**Guidelines & Procedures for Gift Acceptance** (overseen by Financial Services)

[https://www.usask.ca/fsd/resources/guidelines/gift\\_acceptance.php](https://www.usask.ca/fsd/resources/guidelines/gift_acceptance.php)

## **IN PRACTICE:**

# A system of checks and balances

**Development Officer**

**Executive Director, Operations & Services**

**Dean or Chair of college/unit of donation allocation**

**Student Awards Office (if applicable)**

**Associate Vice-President, Development & CDO**

**Legal counsel (if required or sought)**

**Vice-President, University Relations**

**Board of Governors**

## IN PRACTICE:

# The terms of reference

- Define the purpose of the gift, and use of funds
- Outline the source and the amount of funding
- Include the designation of fund committee and committee mandate
- Terms may not exclude, or discriminate against, a group or class, unless such exclusion or discrimination has the effect of favouring one or more designated groups as provided for in an approved institutional plan or equity program
- Shows what will happen if there is a change in circumstance



## IN PRACTICE:

# The gift agreement

- Includes language specific to the gift allocation and the payment period for the gift
- Includes language specific to a donor's involvement
- Includes language protecting the university's interests and aligned with the university's policies