

## UNIVERSITY OF MANITOBA POLICY

<b>Policy:</b>	<b>Fundraising</b>
<b>Effective Date:</b>	January 27, 2026
<b>Revised Date:</b>	
<b>Review Date:</b>	January 27, 2036
<b>Approving Body:</b>	President
<b>Authority:</b>	President
<b>Responsible Executive Officer:</b>	Vice-President (External)
<b>Delegate: (If applicable)</b>	Associate Vice-President (Donor Relations)
<b>Contact:</b>	Associate Vice-President (Donor Relations)
<b>Application:</b>	All University Faculty and Staff

### Preamble

- 1.1 Philanthropic support plays a vital role in advancing the mission, vision, and strategic priorities of the University. This Policy establishes a unified framework across the University that ensures all Fundraising Activities are coordinated and conducted with integrity, transparency and alignment with institutional goals.

### Part II Reason for Policy

- 2.1 To foster a culture of collaboration, excellence, and responsible philanthropy.
- 2.2 To establish a framework for all Fundraising Activities conducted by or on behalf of the University that ensures coordination, accountability, and alignment with strategic institutional goals and Donor expectations.

- 2.3 To outline the roles, responsibilities and obligations of the External Relations unit and its Donor Relations team, with regards to oversight of Fundraising Activities at the university.
- 2.4 To outline the requirements that members of the University Community must follow when seeking to engage in Fundraising Activities or deliver Fundraising Communications including brochures, letters, digital content, and promotional items.
- 2.5 Ensure that the University fulfils its responsibility to properly raise and steward Donations.

### **Part III Policy Content**

#### **Definitions**

**“Donor”** means a person or organization making a Donation.

**“Donor Relations”** means individuals holding appointments with the University in the External Relations Unit, Donor Relations team.

**“External Relations”** means individuals holding appointments with the University in the External Relations Unit, under the Vice-President (External Relations).

**“Fundraising” and “Fundraising Activities”** means any activity that solicits Donations to support the University’s mission, vision, and strategic and research priorities.

**“Fundraising Communications”** means any communications in any media made for the purpose of soliciting Donations, which includes, but is not limited to, brochures, letters, digital content and other promotional items.

**“Donation”** includes a pledge to make a donation to the University of Manitoba.

**“Policy”** refers to this Fundraising Policy .

**“Procedures”** refers to any procedure established under this Policy.

**“Prospect Clearance”** refers to the process of defining and delineating the potential philanthropic projects that are presented and shared with a prospective Donor. This is done to ensure that Fundraising Activities are coordinated and prevents misaligned or conflicting approaches.

**“Terms of Reference”** is a form of gift documentation used by the University to document Donor intent, criteria and provisions associated with Donations for consideration and approval by the appropriate authority designated by the University.

**“University”** means the University of Manitoba.

**Governance and Approval:**

- 3.1 All members of the University community contemplating Fundraising Activities must engage with External Relations to obtain approval, coordinate efforts and ensure adherence to this Policy and any established Procedures, as amended from time to time. All Fundraising Activities require prior consultation, knowledge and written approval by the Vice-President (External) or designate.
- 3.2 External Relations is responsible for coordinating all Fundraising Activities including being the centralized authority for all Donor and prospective Donor management, management of alumni and Donor databases and facilitating collaboration across the institution.
- 3.3 No prospective Donor shall be contacted without prior consultation and Prospect Clearance provided by the Vice-President (External) or designate.
- 3.4 Once a Fundraising Activity is approved, Donor Relations will work closely with the initiating faculty, college, school, or administrative unit to plan and execute related Fundraising Activities, including but not limited to, Prospect Clearance, Donor contact and creation of proposals, Terms of Reference, gift fulfillment and stewardship.
- 3.5 All Fundraising Communications must be developed in conjunction with External Relations and approved by the Vice-President (External) or designate.

**Ethical Standards:**

- 3.6 All Fundraising Activities must adhere to the highest standards of integrity, transparency, and respect for Donor intent.
- 3.7 The University is committed to Donor confidentiality and compliance with Canada Revenue Agency guidelines and all applicable privacy laws and regulations.

**Reporting:**

- 3.8 Faculties, colleges, schools, and administrative units are responsible to document and report on all approved Fundraising Activities to External Relations. This includes Donor communication and interaction, Donor contact information and records, spending plans, financial information, and campaign outcomes.

#### **Part IV Accountability**

- 4.1 The Vice-President (External), or their delegate, is responsible for the implementation, administration, and review of this Policy.
- 4.2 All University faculty and staff are responsible for complying with this Policy.

#### **Part V Authority to Approve Procedures**

- 5.1 The Vice-President (External) may approve Procedures, if applicable, which are secondary to and comply with this Policy.

#### **Part VI Review**

- 6.1 Governing Document reviews shall be conducted every ten (10) years. The next scheduled review date for this Policy is January 27, 2036
- 6.2 In the interim, this Policy may be revised or repealed if:
  - (a) the President or the Approving Body deems it necessary or desirable to do so.
  - (b) the Policy is no longer legislatively or statutorily compliant; and/or
  - (c) the Policy is now in conflict with another Governing Document.
- 6.3 If this Policy is revised or repealed all Secondary Documents, if applicable, shall be reviewed as soon as possible in order that they:
  - (a) comply with the revised Policy; or
  - (b) are in turn repealed.

#### **Part VII Effect on Previous Statements**

- 7.1 This Policy supersedes all of the following:
  - (a) all previous Board of Governors/Senate Governing Documents on the subject matter contained herein; and
  - (b) all previous Administration Governing Documents on the subject matter contained herein.

## **Part VIII**

### **Cross References**

8.1 This Policy should be cross referenced to the following relevant Governing Documents, legislation, and/or forms:

- (a) [Gifts to the University Policy](#)
- (b) [Student Awards Policy](#)
- (c) [Naming of Academic Units Policy](#)
- (d) [Naming of Buildings, Parts of Buildings and Spaces Policy](#)
- (e) [Trust and Endowment Fund Policy and Procedure](#)
- (f) [Responsible Investment Policy](#)
- (g) [Investment Policy Statement – University Investment Trust](#)
- (h) [Administration and Control of Operating Funds Procedure](#)