



THE ADVANCEMENT OFFICE (AO)

1. PURPOSE

- 1.1 The purpose of this Policy is to state the University of Saint Joseph (the University) Advancement Office (AO) mission and define standards that govern the solicitation and acceptance of gifts made to the University.

2. VISION

- 2.1 The vision of AO is to create top of mind presence among our local and the global community to enhance the University's image that will lead to desired levels of support and advocacy from public and private sectors.

3. MISSION

- 3.1 The mission of the AO is to assist the University meet the needs of current and future strategic objectives, scholarships, internships, enhancement of current facilities and development of new construction projects by seeking financial support and available resources through the development, cultivation, solicitation, and engagement of philanthropic partners, private donors, foundations, corporations, alumni, and volunteers, locally and around the world.

4. MAIN RESPONSIBILITIES

- 4.1 To achieve the University's goals, the AO shall pursue to create an infrastructure to support philanthropic activities, and establish a criterion to keep our supporters and benefactors informed about the University achievements and our continued progress toward educational excellence, involve our partners and friends in the development of the University goals, and inspire a culture of giving that moves the University toward its strategic plan in terms of stakeholder engagement and fundraising.
- 4.2 In doing so, AO's essential duties and responsibilities include, but not limited to:
 - i. ensure that the University complies with local laws and regulations regarding fundraising; contributions;
 - ii. identify fundraising priorities;
 - iii. evaluate target audiences to detect possible new benefactors;
 - iv. promote the University locally, regionally, and internationally to alumni and friends to support fundraising;
 - v. develop, negotiate, and manage partnerships with the private sector that will help to attract philanthropic support;
 - vi. secure private and public financial resources for support of the annual fund, special projects, and other institutional programs and priorities and campaign initiatives;



- vii. manage all endowments, bequests, estates, trust arrangements, in which the University is the intended beneficiary;
- viii. work with the OSAA to maximize the potential of alumni relations activity to support and advance fundraising success for the University;
- ix. carry out risk analysis and balance time-cost ratios to focus effort on the fundraising activities that are most appropriate and will have the highest chance of success;
- x. oversee the implementation and execution of fundraising strategy to meet year-end goals;
- xi. develop, prepare, write and submit grants, proposals, applications, and reporting;
- xii. prepare and compile all components of each grant submission, ensuring that the proposal is formatted, packaged, and submitted in accordance with granting requirements;
- xiii. prepare all relevant grants and funding materials including but not limited to narratives describing program activities, concept papers, detailed expenditure reports, and success stories;
- xiv. maintain a portfolio of active and pending grants and provide monthly status reports;
- xv. create and distribute standard and special reports, studies, summaries, and analyses, as required.
- xvi. manage administrative problems and/or budget changes occurring during the awarded granting period.
- xvii. through close collaboration with Finance Office ensure the timely, relevant and accurate movement and use of funds in accordance with donor wishes and financial regulations;
- xviii. prepare and update information list and status of donor;
- xix. coordinate provisions of services for donors;

5. ACCOUNTABILITY

- 5.1 To ensure that fundraising operations at all levels are conducted in accordance with charity law and the University regulations and policies having particular regard to ethical gift acceptance policies and data protection laws.

Note: The right to interpret the provisions in this Policy rests with the University's Executive Council.

Author: Administrator

Approved by: Executive Council

Approved on: 12 April 2022

Operational commencement date: 12 April 2022

Access Right: Public

Version number: V001.1