

ST. JOSEPH ACADEMY
(SJA)

Department:	Philanthropy (Resource Development)
Number:	410.1
Effective Date:	4/18/2017
Review Date:	3/25/2024
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Page:	1 of 1

- I. Policy: To ensure a centralized and coordinated approach to SJA donors and to ensure that their interests are identified and matched with our priorities, please follow the guide to prospect clearance.
- II. Procedures:
- A. No fundraising project or solicitation shall be undertaken without the knowledge and approval of the President & CEO & Resource Development Office.
 - B. When a fundraising project or solicitation has been approved, the fundraising activities are to be undertaken in conjunction with the President & CEO and Resource Development Office.
 - C. No approaches to donors shall be made without having established with the President & CEO and Resource Development Office the intent to approach a donor and verification has been made with the Resource Development Office that an approach is allowable and no other approaches to said donor have recently been made or will be made in the near future.
 - D. All fundraising materials such as brochures, letters, emails etc. must be reviewed and approved by the President & CEO.
 - E. All fundraisers must submit a financial report to the Finance Department and Resource Development. Information included on the report should include: Fundraiser Name, Date, Name of Person completing the report, Income Detail, Expenses and total profit.
 - F. Publicity and promoted activities for fundraising are based upon the actual program and operations of the charitable organization.
 - G. SJA does not sell or otherwise permit others to use lists of our donors, supporters, and/or WI SECC charitable contributors.
 - H. Our organization does not mail unordered tickets or merchandise with a request for money in return.
 - I. Other policies are available from the Resource Development Department including:
 - 410.2 Donor Prospecting and Clearance
 - 410.3 Gift Acceptance
 - 410.4 Third Party Fundraising
 - 410.5 Building & Spaces Naming Rights

Approved by: _____

President/CEO

Date: _____

3/27/2024