St. Joseph Academy

Department: Philanthropy (Resource Development)
Number: 410.2
Effective Date: October 15, 2019
Review Date: March 19, 2025
Revised Date: March 19, 2025

I. Policy: To ensure a centralized and coordinated approach to the SJA donors, and to ensure that their interests are identified and matched with our priorities, procedures to guide prospect clearance have been developed in accordance with the organization's Fundraising Policy.

II. Procedures:

Prospect Clearance

The organization values its donors, volunteers and friends and wishes to protect them from multiple, untimely or inappropriate approaches by members of the organization's community. This policy applies to all units engaged in fundraising activities as well as all donors or potential donors to the organization. All information regarding donors, volunteers and donor prospects will be dealt with in confidence and in compliance with the Freedom of Information and Protection of Privacy Act.

A donor prospect may be an individual, a group of individuals, a foundation, a corporation (public or private), an organization or a government department (municipal, provincial or federal). A volunteer is an individual who is to be recruited to assist the organization who does not receive pay.

Prospective donor clearance must be given by the President and CEO and Resource Development Office and must be submitted and approved before any approach is made to a prospect.

Criteria for prospect clearance decisions include:

- current or potential status as a prospective donor
- affiliation to the organization
- known or possible interest in the project area
- giving history with the organization
- current cultivation and solicitation activity
- the amount to be requested
- the purpose and priority of a project for which a prospect is being considered
- corporate or foundation prospect's donations program and budget

Clearance will be denied when the prospect:

- is in the process of deciding on a proposal submitted by the organization
- has been cleared for solicitation for another project
- has indicated that proposals will not be accepted at this time
- has recently made a major contribution or has an open pledge (clearance may be given at a later date)
- is unsuitable to the organization

Approved by: _____ Date: 3/20/25
(President/CEO)