

Guiding Principles

As presented by the Canadian Council for the Advancement of Education Guiding Principles, May 24, 2024

In general, AIM should be:

1. **Reasonable:** fees should be as reasonably modest as possible with secure caps or maximums in place to avoid overreach and to ensure each gift achieves its intended impact.
2. **Fair:** fee models should ensure both benefactors and beneficiaries share in the costs of securing, managing and stewarding gifts, recognizing that the majority of such costs are covered through institutional operating budgets.
3. **Transparent:** fees should be openly communicated to donors through clear policies and regular reporting; links to web-based policies or guidelines should be included in all proposals, gift agreements and stewardship reports.
4. **Consistent:** fees should be applied universally to *all* gifts, regardless of source, amount, purpose, designation, etc., without exceptions or exemptions.
5. **Simple:** fee models should be easy to implement, hard to "game," and avoid convoluted or overly complex fee structures.
6. **Impactful:** fees should be geared to impact and clear in their purpose—to improve advancement's capacity to raise, secure, manage and steward gifts, grow fundraising success/donations, enhance the donor experience and promote meaningful alumni engagement at scale.
7. **Equitable:** fees should be distributed thoughtfully and strategically to enable growth in fundraising and engagement results broadly to the benefit of the entire institution; in more decentralized programs, such fees should be distributed equitably for the benefit of all advancement teams.

8. **Scalable:** fees should scale with success, forming a virtuous circle of advancement investment that generates a high rate of return in the form of additional giving and engagement.

9. **Supplemental:** fees associated with this model should supplement and grow advancement budgets, not offset or replace them, to support scaling of fundraising and engagement results.

If you have any questions, please contact:

Mike den Haan, Vice-President, Advancement

mike.denhaan@lakeheadu.ca