

PROCESS FOR ENGAGING INDIVIDUAL DONORS

1. CAI staff build relationship with individual donor
 - a. Donor receives information about who CAI is, what we do, what we cannot do (e.g., lobbying and other restrictions as state entity)
2. CAI staff draft proposal for funding that outlines what funds will go towards
3. Draft proposal circulated to Executive Committee before shared with prospective donor
4. Draft proposal shared with donor and UW Advancement informed
5. Repeat steps 1-4 until finalized
6. Donor commits to funding in writing (email, letter)
7. CAI staff identify patient advocate liaison to serve as point of contact with donor
8. CAI staff send donor instructions on donation and inform UW Advancement
9. CAI staff set up regular check ins (at least quarterly, unless otherwise requested) with donor for patient advocate liaison to update them on progress and any changes to proposed activities

PROCESS FOR ENGAGING CORPORATE SPONSORS

1. CAI staff and/or Board members build relationship with corporate sponsor
 - a. Corporate sponsor receives information about who CAI is, what we do, what we cannot do (e.g., lobbying and other restrictions as state entity)
2. CAI staff sends application to corporate sponsor when appropriate
 - a. If relationship is through Board member, CAI staff should be introduced at this point
3. CAI staff receive and review application from corporate sponsor
4. Executive Committee reviews application together on next regular call and makes recommendation to approve/decline
5. Application and Executive Committee's recommendation are sent to full Board of Directors for final vote
6. If declined, Executive Director sends email thanking them and explaining decision
7. If approved, CAI staff send sponsor instructions on donation and inform UW Advancement
8. CAI staff set up regular check ins with sponsor to update them on activities and opportunities for collaboration