


DOCUMENT TYPE	D	
ADMINISTRATIVE	5	
DEVELOPMENT	7	
FUNDING	2	
NUMBER	004	
		Policy Database Document Reference Number 572004D

DONOR RIGHTS PROCEDURES

Parent Policy Title	Donor Rights Policy													
Associated Documents	Gifts Policy Gifts Procedures													
Preamble	<p>The University Development Office will be responsible for the co-ordination, assignment and management of donations, donors and prospective donors to La Trobe University.</p> <p>The Development Office, established within the University's Business Development function, will be the central co-ordinator for all University fundraising activities, also acting as an advisory service, a repository of information on all donors and prospective donors and as a clearinghouse for all fundraising campaigns, appeals, submissions and approaches.</p>													
General	<p>All donors to the University who have presented a gift in cash or kind, regardless of value, will be stewarded by the University Development Office.</p>													
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1. Provision of information to donors	<p>When the Development Office first contacts a donor to acknowledge their gift to the organisation, they will be provided with information on the La Trobe University Foundation's mission, of the way the organisation intends to use donated resources, and of its capacity to use donations effectively for their intended purposes. They will also be sent information on the La Trobe University Foundation Advisory Committee.</p> <p>The LTU Foundation reserves the right not to accept any gift.</p> <p>Donations to the LTU Foundation may be eligible deductions for income tax purposes.</p>													
2. Development Office Annual Report	<p>The Development Office is required to produce an Annual Report for the La Trobe University Foundation. The Annual Report will contain information on the financial statements of the Foundation and the report will be circulated or made available (via the web) to all donors recorded</p>													

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	<p>on the databases held by the Development Office.</p> <p>All cash gifts of \$1,000 and over and gifts-in-kind valued at \$10,000 or greater will be acknowledged in the LTU Foundation Annual Report.</p>
3. Acknowledgement letters and Receipts for donations	<p>The Development Office is required to follow the procedures outlined in the Gift Procedures (Acknowledgement) to recognise each gift from donors to the University.</p> <p>The University will issue a receipt for all cash donations over \$2. This receipt will be issued in the name of the drawer of the cheque, the person named on the credit card, or as indicated in the donation form. A letter of acknowledgment will accompany the receipt which will be forwarded to the donor. In-kind contributions over \$50,000 will be receipted against sworn valuation.</p> <p>Payments made to the LTU Foundation should be forwarded to La Trobe University Foundation, La Trobe University, Victoria. 3086. A letter outlining the purpose of the donation or a completed donation form should accompany the payment. The University accepts credit cards (Visa, MasterCard), electronic funds transfer and cheques.</p>
4. Stewardship of Donors	<p>The Development Office is expected to manage the stewardship of each donor according to the procedures outlined in the Gift Procedures (Stewardship of Gifts and Stewardship of Donors).</p>
5. Management of complaints	<p>The Development Office will be required to manage any questions, concerns, complaints etc received from donors. Any individual or group (such as a campus, faculty or division) that receive direct communication from donors to the organisation should forward these to the Development Office to be addressed.</p>
Status	<p>New. This procedure replaces any procedures for fundraising formerly in place within the organisation and works in conjunction with procedures outlined in the Staff Guides for the administration of monies raised through fundraising.</p>
Approval Body	<p>Senior Management Committee – July 2008</p>
Initiating Body	<p>Senior Management Committee – July 2008</p>
Date Effective	<p>July 2008</p>
Next Review Date	<p>January 2010</p>
Keywords	<p>Donors, donations, gifts, La Trobe Foundation, money, sponsorship</p>

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