


DOCUMENT TYPE	P	
ADMINISTRATIVE	5	
DEVELOPMENT	7	
FUNDING	2	
NUMBER	005	
		Policy Database Document Reference Number 572005P

FUNDRAISING POLICY

Purpose/ objectives	The La Trobe University Fundraising Policy governs the soliciting, accepting, administering and allocating of all gifts and/or sponsorships made to the University and the Foundation of greater than \$50,000 in value.
Scope/ Application	<ul style="list-style-type: none"> • This policy applies to all Faculties, campuses, divisions and organisational units of the University. • This policy applies to all cash and in-kind gifts greater than \$50,000.
Policy Statement	<p>All Alumni, individuals, corporations and foundations that have an interest in supporting La Trobe University through philanthropic contributions of greater than \$50,000 will be linked to a Faculty, Campus, or other La Trobe University administrative unit by the University Development office.</p> <p>This will ensure that donor needs and wishes are supported and coordinated to ensure that:</p> <ul style="list-style-type: none"> • Gifts are commensurate with the prospect's desire and ability to give; • The University's priority needs are effectively communicated to prospective donors; • Key personnel/academic links with University staff are respected and encouraged. <p>The University Development Office will oversee relationship-building between donors and La Trobe University through appropriate stewardship (relating to compliance with the donor's wishes; effective management of the gift and accurate record keeping of donor details).</p> <p>Other gifts, such as gifts-in-kind, real estate, stock or planned gifts in excess of \$100,000 will be managed solely by the University Development Office in conjunction with Faculties, Campuses and Divisions.</p> <p>Income earned from referral commissions (by La Trobe University units) is to be paid to the La Trobe Foundation and will be directed in its entirety to the sub-fund to provide support in the relevant area.</p> <p>Donations received of less than \$50,000 will be assigned according to the donor's wishes. Unassigned donations will be managed solely by the Development Office according to the strategic priorities of the University.</p>
Supporting Procedures	Fundraising procedures
Responsibility for implementation	Executive Director, Business Development (for policy approval) Manager, Development (for policy implementation and Policy updates)
Responsibility for monitoring implementation	Executive Director, Business Development (ultimate responsible officer) Manager, Development (for policy monitoring and compliance for Policy updates)

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and compliance	
Status	New Policy
Key stakeholders	La Trobe University Council Vice-Chancellor and members of the Senior Executive Executive Director, Business Development Manager, Development Marketing and Engagement Division
Approval Body	Senior Management Committee – policy approved July 2008
Initiating Body or person(s)	Senior Management Committee – policy approved July 2008
Definitions	Donor prospect: alumni, individual, corporation or foundation likely to offer money, sponsorship or in-kind gift to the University. Stewardship: ensuring that the needs of the donor are met, the gift is well managed and records kept up to date.
Related legislation	Information Privacy Act 2000 Freedom of Information Act 1982
Related Policy and other documents	La Trobe University Gift Policy Named Gifts Policy Naming Rights (Buildings and Facilities) Policy Policy on Intellectual Property Donor Rights Policy Aquila Association Membership Policy Universities Australia Code of Practice for Australian Universities Philanthropy Foundation Code of Conduct
Date Effective	July 2008
Next Review Date	January 2010
Keywords	Donors; donations; gifts; La Trobe Foundation; money; sponsorship; alumni
Owner/Sponsor	Executive Director (Business Development)

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