

DOCUMENT TYPE	D	
ADMINISTRATIVE	5	
DEVELOPMENT	7	
FUNDING	2	
NUMBER	006	
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FUNDRAISING PROCEDURES

Parent Policy Title	Fundraising Policy																		
Associated Documents	La Trobe University Foundation Staff Guides Gift 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 fundraising programs will be co-ordinated by the Development Office, with a strict adherence to prospect clearance, co-ordination and engagement.</p> <p>This will ensure that:</p> <ul style="list-style-type: none"> ▪ All La Trobe University organisation units continue to have access to central fundraising expertise and services. ▪ All fundraising efforts are carefully and professionally co-ordinated. ▪ All contacts with prospective benefactors are planned and undertaken in a manner that maximises donor affinity to and support of La Trobe University. <p>Development Office staff, University staff or appointed external consultants are authorised to solicit funding according to the University's Fundraising Policy.</p>																		
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1. Development Office Responsibilities	<p>The Development Office will be responsible for:</p> <ul style="list-style-type: none"> ▪ Advising the University Executive (including the Vice-Chancellor, Deputy Vice-Chancellors, Pro Vice-Chancellors, Deans) and other 																		

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	<p>University staff on issues related to fundraising;</p> <ul style="list-style-type: none"> ▪ The ongoing operation of the La Trobe University Foundation; ▪ Initiating and co-ordinating fundraising campaigns; ▪ Bequest and planned giving programs; ▪ Prospect research and tracking; ▪ Donor and sponsor stewardship.
2. Commencing Fundraising	Any individual or group (such as a campus, faculty, division) may commence a fundraising activity on behalf of La Trobe University. However, they must first contact the University Development Office prior to contacting donor prospects in order to register the fundraising activity.
3. Advice on Fundraising Activities	The Development Office will advise on the appropriateness and timing of such a solicitation in light of institutional priorities and any known University circumstances or financial commitments/other activities by those considered to be potential donors.
4. Information required by Development Office	<p>If the individual or group (such as a campus, faculty, division) is resolved to proceed with the fundraising activity they must liaise provide the following advice to the Development Office:</p> <ul style="list-style-type: none"> ▪ The name of the local officer(s) responsible for the implementation and management of the fundraising activity/campaign. ▪ The outcomes expected/desired from the fundraising activity/campaign. ▪ The specific purpose to which funds raised will be allocated. ▪ The timeframe for the activity (including a wrap up date, if appropriate)
5. Communication with Development Office	The individual or group (such as a campus, faculty, division) is required to communicate regularly (weekly, monthly, quarterly as appropriate) with the Development Office to update staff on the progress with the fundraising activity.
6. Funds raised	All funds raised through the activity/campaign undertaken will be directed through the La Trobe University Foundation. The money will be allocated from the Foundation fund out to a dedicated sub-fund established by the Development Office for use in the area specified by the individual or group.
7. Unallocated funds raised	<p>Funds raised by the Development Office through their nominated program of activities and campaigns for each calendar year will be allocated to the areas identified in the campaigns, via sub-funds within the University Foundation.</p> <p>Unallocated funds may be applied for by individuals or groups (such as a campus, faculty or division) according to the procedures set out in the Staff Guides for the La Trobe University Foundation.</p>

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8. Donations at Funeral Services	<p>Requests received by organisational units at the University from bereaved family members to collect donations in lieu of flowers at a funeral services may be accepted.</p> <p>The Development Office must be informed of the request to collect donations from the funeral and must agree with the organisational unit the most appropriate person to liaise with the family in this matter.</p> <p>All arrangements to collect the donations should be made through the relevant Funeral Home supporting the family. Acknowledgements of donations received should be handled in the usual way (see Gift Procedures – Acknowledgments).</p>
Status	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.
Approval Body	Senior Management Committee – July 2008
Initiating Body	Senior Management Committee – July 2008
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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