

DOCUMENT TYPE	D	
ADMINISTRATIVE	5	
DEVELOPMENT	7	
FUNDING	2	
NUMBER	010	
		Policy Database Document Reference Number 572010D

NAMED GIFT PROCEDURES

Parent Policy Title	Named Gift Policy													
Associated Procedures	Naming Rights (Buildings and Facilities) Policy and 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>The Development Office is the organisational unit responsible for assessing all approaches for named gift opportunities.</p> <p>No officer, employee, or volunteer associated with the University shall promise, or imply that, in return for a charitable contribution, favourable consideration will be given to:</p> <ul style="list-style-type: none"> • Appointments that imply faculty or administrative status not in keeping with usual University processes for such appointments. • Naming a building or other facility without appropriate University policies and procedures being followed. • Granting of student admission, student scholarships, fellowships, other financial benefits, or special considerations in a manner inconsistent with University policies and procedures. 													
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1. Contact by potential donors	<p>Individuals or groups (such as a campus, faculty or division) who receive a communication from a potential donor asking to sponsor, endow, donate or otherwise provide a gift to the University in return for a naming right should immediately contact the Development Office.</p>													

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2. Development Office responsibilities re: potential donors	<p>The Development Office is required to make contact with the potential donor and establish the terms of the gift, the timeframe for the gift and the level of support to be offered.</p> <p>The Development Office is to make the potential donor aware of the Schedule of Funded Support (Appendix 1) which specifies minimum levels of funding required for named gift opportunities.</p>
3. Meetings with potential donors	<p>If the gift offered meets the requirements of the schedule for the gift they wish to endow to the University, the Development Office will arrange a meeting with between the donor and key staff members in the relevant area. The donor will be briefed by the staff members and the Development Office at this meeting of the ways in which their gift might assist the University in meetings its mission and fulfilling its Strategic Plan.</p>
4. Establishment of named gift	<p>The Development Office is responsible for establishing the named gift, in conjunction with staff from the relevant area, including arranging for any legal agreements needed to be drafted and approved by all parties.</p> <p>Scholarship awards will be managed by the Scholarships Office.</p>
5. Stewardship of donor	<p>The Development Office will oversee the stewardship of the gift and manage the relationship with the donor, in conjunction with the relevant area, according to the Named Gift Policy and the Named Gift Stewardship procedures.</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>
Definitions	<p>Donor: alumni, individual, corporation or foundation who has provided a gift of money, sponsorship or in-kind to the University.</p> <p>In perpetuity: an indefinite period of time.</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>
Owner/Sponsor	<p>Executive Director, Business Development</p>

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