

# Donor Rights Policy

## Section 1 - Background and Purpose

(1) The La Trobe University Foundation recognises that it must merit the respect and trust of those who make a contribution to it. To ensure that donors and prospective donors can have full confidence in the La Trobe University Foundation, the Foundation has developed this Policy.

## Section 2 - Scope

(2) This Policy applies to all Colleges, campuses, divisions and organisational units of the University.

(3) This Policy applies to all gifts in cash and in-kind received by the University.

## Section 3 - Policy Statement

(4) The Australian Tax Office defines a donation as a gift which does not promise direct benefits to the donor. However, all donors to the University who have presented a gift in cash or kind, regardless of value, have the right to expect that:

- a. their gift will be officially receipted so that it may be used for tax purposes.
- b. their gift will be used for the purpose for which it was intended and documented, within approved La Trobe University Foundation policy and the law.
- c. where a gift is invested in perpetuity, it is prudently managed as judged by the common man.
- d. recognition is afforded according to the wishes of the donor as documented at the time of the gift, including the right to remain anonymous.

## Section 4 - Procedures

### Overview

(5) The University Alumni and Advancement Office will be responsible for the co-ordination, assignment and management of donations, donors and prospective donors to La Trobe University.

(6) The Alumni and Advancement Office 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.

(7) All donors to the University who have presented a gift in cash or kind, regardless of value, will be stewarded by the University Alumni and Advancement Office.

### Provision of Information to Donors

(8) When the Alumni and Advancement 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.

(9) They will also be sent information on the La Trobe University Foundation Committee.

(10) The La Trobe University Foundation reserves the right not to accept any gift.

(11) Donations to the La Trobe University Foundation may be eligible deductions for income tax purposes.

### **Alumni and Advancement Office Annual Report**

(12) The Alumni and Advancement 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 on the databases held by the Alumni and Advancement Office.

(13) All cash gifts and all gifts-in-kind valued at \$1000 will be acknowledged in the La Trobe University Foundation Annual Report.

### **Acknowledgement Letters and Receipts for Donations**

(14) The Alumni and Advancement Office is required to follow the procedures outlined in the Gift Policy to recognise each gift from donors to the University.

(15) 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 be part of the receipt which will be forwarded to the donor. In-kind contributions will be acknowledged but not receipted.

(16) Payments made to the La Trobe University 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.

### **Stewardship of Donors**

(17) The Alumni and Advancement 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).

### **Management of Complaints**

(18) The Alumni and Advancement Office will be required to manage any questions, concerns, complaints etc received from donors. Any individual or group (such as a campus, college or division) that receive direct communication from donors to the organisation should forward these to the Alumni and Advancement Office to be addressed.

## **Section 5 - Definitions**

(19) For the purpose of this Policy:

- a. La Trobe Foundation: Established by the Senior Management of the University as a Framework for the management of all donations to the University with the aim of increasing support for the University's Mission.
- b. Donor: Alumni, individual, corporation or foundation who has provided a money, sponsorship or a gift-in-kind to the University.

- c. Stewardship: Ensuring that the needs of the donor are met, the gift is well managed and records kept up to date.

## **Section 6 - Stakeholders**

Responsibility for implementation – Head, Services and Support and relevant College, Campus or Division receiving the gift (if appropriate).

Responsibility for monitoring implementation and compliance – Senior Director, Alumni and Advancement (for policy approval).

## Status and Details

<b>Status</b>	Current
<b>Effective Date</b>	27th September 2016
<b>Review Date</b>	27th September 2017
<b>Approval Authority</b>	Vice-Chancellor
<b>Approval Date</b>	27th September 2016
<b>Expiry Date</b>	Not Applicable
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