

Named Gift Policy

Section 1 - Background and Purpose

(1) The University receives gifts in many forms and of varying value. On occasion, the University may be contacted by prospective donors interested in establishing a named gift (see list of examples below). This Policy ensures that these specific requests are managed appropriately.

Section 2 - Scope

(2) This Policy applies to all:

- a. Colleges, campuses, divisions and organisational units of the University
- b. gifts where the prospective donor is interested in establishing a named gift.

Section 3 - Policy Statement

(3) University personnel who may be contacted by prospective donors interested in establishing a named gift (eg endowed fund, building naming) should seek advice from the Alumni and Advancement Office before any commitment is made on behalf of La Trobe University.

Named Gift Opportunities

(4) The following policy, within the context of existing University policies, will govern named giving opportunities.

Academic Positions, including Named Chairs

(5) For the naming of Professorial Chairs or other relevant academic positions, the Senior Director, Alumni and Advancement will make recommendations to the relevant College Pro Vice-Chancellor. If endorsed by the Pro Vice-Chancellor, the proposal will be referred to the Vice-Chancellor for approval.

(6) Named Academic Positions may be:

- a. Fixed term appointments, where the donor pays for the total cost of the position for a defined period.
- b. Permanently endowed, where the donor has provided a gift large enough to generate revenue on an annual basis which will cover the full cost of the position.
- c. Matching fund appointments, where the University has a vacant appropriate level position but wishes to attract international star calibre candidates and therefore donations are accepted to effect a strategic reclassification of the position and/or the salary package.

Named Buildings

(7) Buildings may be named in recognition of significant financial contributions to the University.

(8) La Trobe University does not grant naming rights for buildings in perpetuity unless there is an endowment

established sufficient to maintain the facility at an adequate standard. A building will only ever carry the name of the donor for the realistic life of the building or any other shorter period as may be specified at the time of the agreement.

(9) For the naming of infrastructure gifts, recommendations from the Senior Director, Alumni and Advancement are made to the Vice-Chancellor.

(10) Parts of buildings are considered under the same policy as whole buildings.

Equipment and Furnishings

(11) The naming of gifts of furnishings and equipment that have a value of less than \$25,000 is at the discretion of the Pro Vice-Chancellor or Campus Director (as appropriate).

(12) For gifts of furnishings and equipment that carry a financial value of more than \$25,000, that are not part of a building, the Pro Vice-Chancellor or Campus Director must seek endorsement from the Senior Director, Alumni and Advancement and approval from the Vice-Chancellor on the naming proposal.

Research Projects/Research Teams

(13) Research teams may be named after donors. Proposals for naming must be developed by the Alumni and Advancement Office in conjunction with the Pro Vice-Chancellor and will be referred to the Deputy Vice-Chancellor (Research and Industry Engagement) for endorsement, before being submitted for approval to the Vice-Chancellor.

Scholarship, Prizes, Medals

(14) Applications for named prizes, scholarships and medals are made through Academic Board.

Book Funds

(15) Donations of books are not covered by this Policy. For book donations, see relevant Library policy.

Section 4 - Procedures

Overview

(16) 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.

(17) 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.

(18) The Alumni and Advancement Office is the organisational unit responsible for assessing all approaches for named gift opportunities.

(19) 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:

- a. Appointments that imply college or administrative status not in keeping with usual University processes for such appointments.
- b. Naming a building or other facility without appropriate University policies and procedures being followed.
- c. Granting of student admission, student scholarships, fellowships, other financial benefits, or special considerations in a manner inconsistent with University policies and procedures.

Contact by Potential Donors

(20) Individuals or groups (such as a campus, college 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 Alumni and Advancement Office.

Alumni and Advancement Office Responsibilities

Potential Donors

(21) The Alumni and Advancement 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.

(22) The Alumni and Advancement Office is to make the potential donor aware of the relevant minimum levels of funding required for named gift opportunities.

Meetings with Potential Donors

(23) If the gift offered meets the requirements for the named gift they wish to endow to the University, the Alumni and Advancement Office will arrange a meeting with between the donor and key staff members in the relevant area.

(24) The donor will be briefed by the staff members and the Alumni and Advancement Office at this meeting of the ways in which their gift might assist the University in meeting its mission and fulfilling its Strategic Plan.

Establishment of Named Gift

(25) The Alumni and Advancement 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.

(26) Scholarship awards will be managed by the Scholarships Office.

(27) To avoid any conflict with naming under the [Recognition of Significant Service and Contributions Policy](#), the Alumni and Advancement Office will provide information on any potential named gifts to the Chief Finance and Operations Officer to ensure that the potential gift is flagged and the building or facility is not named for a significant service or contribution in the interim.

Stewardship of Donor

(28) The Alumni and Advancement Office will oversee the stewardship of the gift and manage the relationship with the donor, in conjunction with the relevant area, according to this Policy.

Section 5 - Definitions

(29) For the purpose of this Policy:

- a. Donor: alumni, individual, corporation or foundation who has provided a gift of money, sponsorship or in-kind to the University.
- b. Named gift: gift to the University of significant value which therefore warrants the naming of that gift after the donor.

Section 6 - Stakeholders

Responsibility for implementation – Head, Services and Support.

Responsibility for monitoring implementation and compliance – Senior Director, Alumni and Advancement.

Status and Details

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Effective Date	28th September 2016
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