

University Donor Recognition Policy

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1. Introduction

The University of Newcastle acknowledges the importance of recognizing the support provided by its many supporters and benefactors.

Through membership of the Australian Vice Chancellor's Committee, it is committed to the 'Code of Practice for Australian University Philanthropy' which requires that "all donors receive appropriate acknowledgment and recognition" (Clause 15, Appendix 4):

http://www.avcc.edu.au/documents/publications/policy/statements/code_of_practice.pdf

2. Definitions / Interpretation

For the Purposes of this Policy:

"Donation" means either a financial payment or a non-financial payment (such as property or other goods) made to the University that has the following characteristics: it is made voluntarily; it does not provide any material benefit to the donor; and it essentially arises from benefaction and proceeds from detached and disinterested generosity.

"Stewardship" means the process whereby an institution cares for and protects its philanthropic support – its gifts and those who give them - in a way that responds to the donor's expectations and respects the act of giving. (1)

"Recognition" means the recording and acknowledgement of a donor's contribution to date. It is one tool used in the stewardship process and recognition tokens should act as an incentive to give as well as symbolize the value of the relationship between the donor and the institution.

Note:

(1) Donor Relations: The Essential Guide to Stewardship, Policies, Procedures and Protocol (1999), Council for Advancement and Support of Education, P.V.

Aims of the Policy

The University Donor Recognition Policy:

- 2.1.** fosters the development of an active culture of benefactor recognition;
- 2.2.** recognizes the need for a uniform approach to benefactor recognition to ensure equity and consistency across the institution;

- 2.3. accommodates the different conditions that may apply when donations are made (eg. donation in perpetuity, payment in annual installments, lump sum for use within a calendar year);
- 2.4. provides incentives for companies and individuals to offer support; and
- 2.5. is supported by Guidelines for Implementation of the University Donor Recognition Policy which assist relevant officers to understand and fulfill their stewardship responsibilities.

3. Statement of Principles

The Recognition Program is based on the following principles:

- 3.1. all donations to the University must be registered through the University Foundation;
- 3.2. adoption of the Donor Recognition Table (Appendix 1) which uses a single recognition principle – ie. the accumulated funds (or estimated accumulated value of non-financial payments) received from a donor;
- 3.3. adoption of a commencement date of 1992 to calculate accumulated totals/values;
- 3.4. recognition of donors prior to 1992 will be at the discretion of the relevant Pro-Vice Chancellor(s) or Head(s) of Division, in consultation with the Executive Officer, University Foundation;
- 3.5. with the exception of donors in the Chancellor's Club, responsibility for donor recognition shall be the responsibility of the relevant Pro Vice Chancellor(s) and/or Head(s) of Division. The Executive Officer, University Foundation, shall be responsible for Chancellor's Club donor recognition and be responsible for overall coordination of, and annual reporting on, donor recognition;
- 3.6. the establishment of special recognition programs for specific campaigns and projects undertaken by the University, and the maintenance of existing recognition arrangements, are not precluded by the Program; however all arrangements which fall outside the Program must be approved by the relevant Pro Vice Chancellor(s) and Head(s) of Division in consultation with the Director, Foundation Unit, and all donations towards these will add to the accumulated totals given by the donor(s);
- 3.7. the Policy will be reviewed every 5 years to ensure that the defined levels of recognition retain comparable economic value and that the benefits for each level of recognition remain appropriate;
- 3.8. the periods over which donors are recognized may vary according to the specific nature of the gift. Donors in the Chancellor's Club will be recognized in perpetuity; and
- 3.9. none of the recognition tokens available through the Donor Recognition Program shall be available for sale, or used in any other promotional activity, thereby ensuring the exclusivity of

the range and symbolism of the donor relationship. Recognition tokens will be sufficiently distinct from commercial memorabilia items so as not to be confused.

4. Costing / Responsibilities

4.1. Unless otherwise negotiated through the University Foundation, responsibilities and costs associated with Purdue, Auchmuty and Tanner Club donor recognition will be assumed by the relevant faculties or divisions. In the case of the Chancellor’s Club, responsibilities will be assumed by the University Foundation, and costs will be met by the Vice Chancellor’s Unit. Costs associated with the donor recognition program are included in the Guidelines for Implementation.

Appendix 1

University Donor Recognition Program - Recognition Table

- All donations to the University, must be registered through the University Foundation
- The relevant Pro Vice Chancellor(s) and/or Head(s) of Division may approve recognition arrangements which fall outside the provisions of the Recognition Table
- The University Foundation will coordinate the Donor Recognition Program
- Unless otherwise negotiated through the University Foundation, responsibility for Purdue, Tanner and Auchmuty Club donor recognition will be the responsibility of the relevant Pro Vice Chancellor(s) and/or Head(s) of Division
- Each Faculty will nominate an administrative Donor Recognition contact person
- An annual Stewardship Audit will be completed by the University Foundation.

Recognition Level	Individual Donor	Corporate Donor	Proposed Benefits
Chancellor’s Club Period of Recognition In perpetuity	Donations of, or valued at: \$250,000+	Donations of, or valued at: \$500,000+	Invitation to appropriate events hosted by the Chancellor, Vice-Chancellor and (relevant) PVC Best seats at events Invitations to exclusive events (eg Honorary degree luncheons) Access to University facilities (Library, Parking, Forum)* Naming Rights (if costs are met)** (individual and corporate donors) (Appropriate Recognition Token) TBD (individual and corporate donors) Receipt Letter of thanks and feedback on

			<p>how donation was used</p> <p>Acknowledgment on University Recognition Site(s)</p> <p>Christmas Card</p> <p>UNINEWS</p>
<p>Purdue Club</p> <p>Period of Recognition To be determined on individual basis</p>	<p>Donations of, or valued at: \$50,000 - \$249,999</p>	<p>Donations of, or valued at: \$100,000 - \$499,999</p>	<p>Invitation to appropriate events hosted by the relevant PVC</p> <p>Naming Rights (if costs are met)** (Appropriate Recognition Token)</p> <p>TBD (individual and corporate donors)</p> <p>Receipt</p> <p>Letter of thanks and feedback on how donation was used</p> <p>Acknowledgment on University Recognition Site(s)</p> <p>Christmas Card</p> <p>UNINEWS</p>
<p>Auchmuty Club</p> <p>Period of Recognition To be determined on individual basis</p>	<p>Donations of, or valued at: \$5,000 - \$49,999</p>	<p>Donations of, or valued at: \$25,000 - \$99,999</p>	<p>Invitation to appropriate events hosted by the relevant PVC</p> <p>(Appropriate Recognition Token)</p> <p>TBD</p> <p>Receipt</p> <p>Letter of thanks and feedback on how donation was used</p> <p>Acknowledgment on University Recognition Web-Site</p> <p>Christmas Card</p> <p>UNINEWS</p>
<p>Tanner Club</p> <p>Period of Recognition Duration of the project, unless otherwise determined</p>	<p>Donations of, or valued at: \$1,000 - \$4,999</p>	<p>Donations of, or valued at: \$2,500 - \$24,999</p>	<p>Receipt</p> <p>Letter of thanks and feedback on how the donation was used</p> <p>Acknowledgment on University Recognition Web-Site</p> <p>Christmas card</p> <p>UNINEWS</p>
<p>Other***</p>	<p>\$2 - \$999</p>	<p>\$2 - \$2,499</p>	<p>Receipt</p> <p>Letter of thanks</p>

Notes:

- *Access to University facilities, to include:
- Access to Library (full academic staff rights and privileges) – cost \$75 per annum
- Staff parking validation sticker (but not actual parking costs)
- Use of Sporting facilities (regarded as members of staff for purpose of the use of sporting facilities)
- ** Naming Rights – as per Policy on Naming Rights
- *** Accumulated totals will be monitored for qualification of Club status
- TBD Items to be determined