

Donor Recognition Guidelines

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1. Rationale and Scope

- 1.1 The University of New England acknowledges the importance of its philanthropic supporters and the need to ensure consistent, appropriate and adequate acknowledgement.
- 1.2 As outlined in the Advancement Policy document, UNE is committed to the Vice-Chancellor's Committee 'Code of Practice for Australian University Philanthropy', which requires that "all donors receive appropriate acknowledgement and recognition".
- 1.3 The Guidelines apply to all gifts, donations and sponsorships, by corporate and individual philanthropy, accepted for or on behalf of the University of New England and its entities:
 - (i) including donations for Scholarships and Prizes
 - (ii) excluding: human anatomy donations; sponsorships and scholarships related to Higher Degree Research (HDR) students; donations to the University Library; Archives and Heritage Centre; Art Collection, and other UNE museum and specialist collections such as the NCW Beadle Herbarium, geological and zoological collections, in consultation with the Office of Advancement and where such bodies:
 - a) have efficient processes and procedures for management of gifts and donations; and
 - b) provide regular reporting of donor information to the Office of Advancement.
- 1.4 The document applies to all UNE staff members, schools, faculties, colleges, groups, research centres, administrative units, directorates and divisions.

2. Principles

The objectives of this document are:

- 2.1 To support the University's intention and obligation to ensure probity in all alumni relations and fundraising activities;
- 2.2 To provide a framework for a uniform approach to donor recognition across the University and its entities.
- 2.3 To foster the development of a culture of benefactor recognition within the university.
- 2.4 To ensure donors and sponsors receive appropriate stewardship and fulfilment of agreements.
- 2.5 To facilitate compliance with fundraising industry requirements.
- 2.6 Provides incentives for companies and individuals to offer financial support.

3. Guidelines

- 3.1 Adoption of a Donor Recognition structure (Appendix A) which establishes clear and defined benefits to donors at varying levels based on their cumulative gifts to the University.
- 3.2 The establishment of special donor recognition systems related to a specific project or fundraising program will be at the discretion of the Director Office of Advancement in consultation with relevant stakeholders.
- 3.3 Any tokens of recognition adopted through the Donor Recognition structure are to be easily distinguishable from any other UNE memorabilia or merchandise readily available.
- 3.4 The periods over which donors are entitled be included in the Donor Recognition structure may depend on the nature of the gift or the project to which the donation has been made.
- 3.5 Donors will be acknowledged during the year in which they qualify for a new donor recognition level according to the Donor Recognition Structure. Donors at the Vice-Chancellor's Circle and Chancellor's Circle levels are acknowledged in perpetuity.
- 3.6 It is intended that a donor remain and continue to progress through the Donor Recognition levels. That is, previous donations should be taken into consideration when determining the appropriate donor level, regardless of any time lapses during their giving history.
- 3.7 Membership of the Heritage Circle is independent of recognition at other levels, for example, a donor may be in the Booloominbah Club but also be a Heritage Circle member.
- 3.8 Naming rights in recognition of a benefactor are undertaken in accordance with the Donor Recognition Structure (Appendix A) and at the discretion of the Vice-Chancellor.

- 3.9 Items funded may be named directly after the benefactor, in accordance with the Donor Recognition Structure, or be given a functional name after which the benefactor will be recorded as its sponsor.

4. Procedures

- 4.1 Where gifts in kind are made to the University Library; Archives and Heritage Centre; Art Collection, and other UNE museum and specialist collections such as the NCW Beadle Herbarium, geological and zoological collections, advice should be given via regular reporting to the Office of Advancement as to where the donor appropriately sits on the Donor recognition structure.
- 4.2 Cumulative totals will be obtained for existing donors from the Donor Management database and acknowledged according to the appropriate level of donation.
- 4.3 In the case of a benefactor being known to have made donations which are not stored within the Donor Management database, recognition and inclusion will be at the discretion of the Vice-Chancellor or their delegate.
- 4.4 None of the donor recognition tokens shall be available for sale or be used in any promotional activity, to ensure the exclusivity of the range and symbolism of the donor relationship. In addition, the tokens shall be sufficiently different from commercial memorabilia items to avoid confusion.
- 4.5 Commemorative plaques and/or Boards of Benefactors will be used to recognise donors according to the Donor Recognition structure (Appendix A).

5. Costs and Responsibilities

- 5.1 On behalf of the University, the Office of Advancement oversees acceptance, receipts, records and acknowledgements of gifts and sponsorships.
- 5.2 The Office of Advancement is primarily responsible for the stewardship of donor relationships, in cooperation with other stakeholders as appropriate.
- 5.4 It is the responsibility of all UNE staff members, schools, faculties, colleges, groups, research centres, administrative units, directorates and divisions to ensure accurate and timely communication with the Office of Advancement with regard to all donor and alumni relations activity. This will ensure centralisation of data and appropriate and consistent management and recognition of donors and alumni.
- 5.5 The Office of Advancement is responsible for ensuring that donor recognition is provided at the appropriate level and in accordance with structure (Appendix A) and in co-operation with stakeholders as appropriate.
- 5.6 The Office of Advancement is responsible for reporting on the Donor Recognition system.
- 5.7 Unless otherwise negotiated through the Office of Advancement, responsibilities and costs associated with donor recognition at the General Supporter, Trevenna Club and Booloominbah Club levels will be assumed by the Office of Advancement. In the case of the Heritage Circle, Chancellor's Circle and Vice-Chancellor's Circle, administrative responsibility will be

assumed by the Office of Advancement while costs will be met by the Vice-Chancellor's unit.

- 5.8 In the event that the flow of funds pledged ceases before the agreed time, the Vice-Chancellor may recommend to Council that the benefactor's naming rights and/or donor benefits be discontinued.
- 5.9 If an individual or organisation, after whom an item has been named, comes into disrepute in the University or the community at large, the Vice-Chancellor may recommend to Vice Chancellor's Committee and then to Council that the use of the name be discontinued.

Approval signature

Vice Chancellor

Chief Development Officer

Appendix A

Donor Recognition Structure

The Office of Advancement will oversee and coordinate donor acknowledgement and stewardship functions.

Donors will be recognized according to the structure outlined below:

Donor Recognition Level	Gift required from Donors	Donor Benefits	Naming rights available at each level	Conditions relating to Naming Rights
Heritage Circle **	Confirmation of intention to make a bequest to the University	<ul style="list-style-type: none"> • See benefits associated with the Chancellor's Circle below • Unique Heritage Circle pin • Invitation to special Heritage Circle and Benefactor's function/s personally hosted by the Chancellor and/or Vice-Chancellor 	Dependent upon amount bequested. See other levels of donor recognition for details.	
Chancellor's Circle	<p>Individual: Donation of or with value of \$200,000 or more</p> <p>Corporate Sponsor: Donation of or with value of \$400,000 or more</p>	<ul style="list-style-type: none"> • Receipt • Thank you from Chancellor • Invitation to appropriate events hosted by the Chancellor, Vice-Chancellor or UNE Foundation • Priority invitation to Supporter function • Reserved priority seating at public events • Naming rights* • Christmas card • Inclusion on Donor Wall • Inclusion on website list of donors • Inclusion on 	<p>1. Naming of a building</p> <p>2. Naming of part of a building eg. Lecture theatre, laboratory, walk, garden, courtyard, equipment or other facilities with the approval of the Vice-Chancellor.</p>	<p>1. Individual: Donation of no less than 25% of the cost of the building or an endowment of \$1m+</p> <p>Corporate: Donation of no less than 50% of the cost of the building or an endowment of \$5m+</p> <p><i>Naming rights will normally not extend beyond the life of the building.</i></p> <p>2. Individual: Minimum donation of \$100,000</p> <p>Corporate: Minimum donation of \$500,000</p> <p><i>Naming rights for parts of buildings would normally remain in place for no longer than 10</i></p>

		<p>published list of donors</p> <ul style="list-style-type: none"> • Appropriate recognition token • Acknowledged in perpetuity • Receive UNE Experience 	<p>3. Named endowed Chair</p> <p>4. Named research position, eg. Post-doctoral fellow</p> <p>5. HDR Domestic/International Scholarship</p> <p>6. Named Research Grant</p> <p>7. Undergraduate Scholarships (3-5 years)</p>	<p>years.</p> <p>3. Minimum donation of \$5m</p> <p>4. Donation in range \$100,000 - \$5m</p> <p>5. Donation of \$100,000</p> <p>6. Donation range \$25,000 - \$99,000</p> <p>7. Donation range \$15,000 - \$25,000</p>
Vice-Chancellor's Circle	<p>Individual: Donation of or with value of \$50,000 - \$199,999</p> <p>Corporate Sponsor: Donation of or with value of \$100,000 - \$399,000.</p>	<ul style="list-style-type: none"> • Receipt • Thank you from Vice-Chancellor • Invitation to appropriate events hosted by the Chancellor, Vice-Chancellor or UNE Foundation • Priority invitation to Supporter function • Reserved priority seating at public events • Naming rights* • Christmas card • Inclusion on Donor Wall • Inclusion on website list of donors • Inclusion on published list of donors • Appropriate recognition token • Receive UNE Experience 	<p>1. Naming of part of a building eg. Lecture theatre, laboratory, walk, garden, courtyard, equipment or other facilities with the approval of the Vice-Chancellor.</p> <p>2. Named research position, eg. Post-doctoral fellow</p> <p>3. HDR Domestic/International Scholarship</p> <p>4. Named research grant</p> <p>5. Undergraduate Scholarships (3-5 years)</p>	<p>1. Individual: Minimum donation of \$100,000 Corporate: Minimum donation of \$300,000</p> <p>2. Donation in range \$100,000 - \$5m</p> <p>3. Donation of \$100,000</p> <p>4. Donation range \$25,000 - \$99,000</p> <p>5. Donation range \$15,000 - \$25,000</p>
Booolominbah	\$5000 -	<ul style="list-style-type: none"> • Receipt 	1. Named research	1. Donation range

Club	\$49,999	<ul style="list-style-type: none"> • Thank you letter • Invitation to appropriate events hosted by the UNE Foundation • Invitation to Supporter function • Christmas card • Inclusion on website list of donors • Inclusion on published list of donors • Certificate of Appreciation • Receive UNE Experience 	grant 2. Undergraduate Scholarships (3-5 years)	\$25,000 - \$99,000 2. Donation range \$15,000 - \$25,000
Trevenna Club	\$1000 - \$4999	<ul style="list-style-type: none"> • Receipt • Thank you letter • Inclusion on list of donors • Invitation to Supporter function • Christmas card • Receive UNE Experience 		
General Supporters	\$2 - \$999	<ul style="list-style-type: none"> • Receipt • Thank you letter 	1. Named paver on the Graduates' Walk	1. Purchase for \$400 to support Country Scholarships

*In accordance with the Naming Rights conditions outlined.

** A donor may be a Heritage Circle member and also be recognised at another level of this structure based on other donations made.

Notes:

- This structure refers to naming rights in recognition of donations only. It does not include Naming Rights in recognition of service or achievement.
- Donations of good or services in kind (non-financial donations) will be assessed on a case by case basis and the appropriate donor recognition level determined by the receiving UNE entity and communicated to the Office of Advancement.
- Proposals for naming facilities should be submitted to the Vice Chancellor through the Office of Advancement for recommendation to the Vice Chancellor. If endorsed by the Vice Chancellor, s/he will make a recommendation to this effect to University Council;
- Naming rights may be extended to donors who may still have a substantive formal relationship with the University;

- Donation requirements for Naming Rights will be adjusted annually to reflect CPI Index from the Bureau of Statistics.
- Style of naming facilities will be consistent with the University's Visual Identity Guidelines currently in force at the University