



## Donations to Curtin Procedures

### 1. LEGISLATION/ENTERPRISE AGREEMENT/POLICY SUPPORTED

[Best Practice Financial Management Policy](#)

[Curtin University Statute No. 14 – Curtin University of Technology Foundation](#)

### 2. PROCEDURAL DETAILS

#### 2.1 Acceptance of donations

- 2.1.1 The University will accept Donations only through the Curtin University of Technology Foundation (the Foundation) in accordance with Statute No. 14. Staff of other areas of the University who directly receive Donations or notification of intent to donate will work with the Foundation through the Office of Advancement to ensure the donation is directed to the appropriate Foundation cost centre.
- 2.1.2 Staff of the Office of Advancement will oversee that Donations are accompanied by documented evidence of the donor's intent to make the Donation to the University and how they wish their gift to be used.
- 2.1.2 Where a Donation is directly related to a research project, the Research Office at Curtin is responsible for the risk assessment and will work with the Office of Advancement to ensure both the *Research Management Policy* and *Donations Policy* are both adhered to.
- 2.1.3 If changed circumstances prevent the University from applying a Donation as originally intended by a donor, Staff of the Office of Advancement will, where possible, contact the donor regarding change of use or otherwise work with area where Donation has been directed to ensure the use is as close to the intended purpose as possible.

#### 2.2 Donation enquiries

- 2.2.1 Staff receiving Donation enquiries will direct the enquirer to the Foundation. Where a prospective donor prefers direct contact with a particular area of the University, staff of that area will ensure the Foundation is involved in coordinating such contact.

#### 2.3 Refusal of donations

- 2.3.1 The University may refuse any Donation that is not aligned with its Values. Where there is any doubt regarding the appropriateness of a Donation, the acceptance of the donation may only be authorised by the relevant Executive Manager in consultation with the Director, Office of Advancement.
- 2.3.2 Donations and funding from the tobacco industry will not be accepted by the University.

#### 2.4 Works of art and Library donations

- 2.4.1 Works of art may be donated to the Curtin University Art Collection through the Foundation. Staff will refer any enquiries regarding such gifts to the Associate Director, John Curtin Gallery. The Associate Director, John Curtin Gallery will ensure any Donations of artworks are registered through the Foundation and provide a fair valuation for recording purposes.
- 2.4.2 The University Librarian will ensure Donations to the University Library and the John Curtin Prime Ministerial Library (JCPML) are processed in accordance with the Curtin University Library Collection Principles, the John Curtin Prime Ministerial Library Program Statement, or both.

#### 2.5 Scholarships

- 2.5.1 Where a scholarship is provided to the University and it is a Donation, the relevant Manager, Scholarships (undergraduate and postgraduate coursework or higher degree by research) will be consulted and will ensure the Donation is processed by the Office of Advancement as described in section 2.1.

## 2.6 Research

2.6.1 Applications for funding that may meet the definition of a Donation and that are for research activity will comply with the *Research Management Policy*, and the Research Office at Curtin will ensure that the Donation is processed by the Office of Advancement as described in section 2.1.

2.6.2 Donations provided to the University to support research, but not in relation to a specific research project will be processed by the Office of Advancement as described in section 2.1. The Office of Advancement will then work with the Research Office at Curtin to identify appropriate project(s) in line with the donor's wishes.

## 2.7 Taxation

2.7.1 Curtin University is a registered "Deductible Gifts Recipient" for tax benefit purposes on applicable donations.

2.7.2 Staff will not provide advice on tax matters to donors or potential donors. Donors should be encouraged to seek their own independent tax advice.

## 2.8 Stewardship of donors and other stakeholders

2.8.1 Stewardship of donors is vital in the process of donor management. The Office of Advancement is responsible for the:

- suitable and timely acknowledgement and tax receipting of all Donations received;
- appropriate recognition of donors; and
- ongoing stewardship of donors.

2.8.2 The heads of areas benefiting from Donations will also be involved in stewardship activities to ensure donors feel valued and recognised.

## 3. RESPONSIBILITIES

In addition to those responsibilities listed in section 2

3.1 Director, Advancement (Office of Advancement) has responsibility for the management of the University's Donation fundraising activities, including the coordination of fundraising campaigns, major gift fundraising, the recognition and stewardship of donors, the administration of Donations and management of the Alumni Relations program.

3.2 University staff requiring philanthropic fundraising support for projects will discuss potential projects with the Office of Advancement. If the project is determined to be feasible, they will seek PVC and/or area head endorsement for the project. Where the project is a research project, University staff will ensure compliance with the *Research Management Policy*.

## 4. SCOPE OF PROCEDURES

These procedures apply to all staff.

## 5. DEFINITIONS

(Note: Commonly defined terms are located in the [Curtin Common Definitions](#). Any defined terms below are specific to this document)

### **Campaign**

A specific, defined series of activities to raise money for a clearly defined project.

### **Donation**

A gift of money or property which is made as an act of benefaction on the part of the donor to the University with no material gain or benefit expected in return. Donations:

- may be directed toward a specific purpose or left at the University's discretion. (For examples and further information please refer to Curtin University – Definitions of External Income)
- can be given by an individual, business, trust, foundation, association or other tax-paying entity (Donor), but does not include government (Federal, State or Local) funding.
- include any monies received by the University because of the gift of money (such as interest payable).

### Foundation Cost Centres

The Foundation operates and manages a series of cost centres (endowed and non-endowed funds with specific purposes) in accordance with the requirements of Statute 14.

### Stewardship

The development of processes to effectively manage the receiving, receipting and reporting of gifts in a transparent and consistent manner. Stewardship also incorporates the development of active engagement plans involving key stakeholders to maintain ongoing interaction with donors.

## 6. SCHEDULES

Nil

## 7. RELATED DOCUMENTS/LINKS/FORMS

[Curtin Foundation – Donations Processing Flowchart](#)

[Curtin University – Definitions and Explanations of External Income Sources](#)

[Generating and Receiving Income Policy](#)

[Curtin Foundation website](#)

[Scholarships website](#)

[Curtin University Library Collection Principles](#)

[John Curtin Prime Ministerial Library Program Statement.](#)

[Research Management Policy](#)

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## REVISION HISTORY

Version	Approved/ Amended/ Rescinded	Date	Committee / Board / Executive Manager	Approval / Resolution Number	Key Changes and Notes
	Approved	05/11/2015	Vice President, Corporate Relations	EM1518	Conditional upon PMC rescission of the Donations Policy and Procedures. PMC rescinded the Donations Policy and Procedures on 24th November 2015 PMC 100/15
	Administratively Updated	28/04/2016	Director, Legal and Compliance Services		Removal of Guiding Ethical Principles to Curtin Values