



RHODES UNIVERSITY
Where leaders learn

1. HEADING

POLICY TITLE	DONOR RECOGNITION AND STEWARDSHIP POLICY
POLICY LEVEL	UNIVERSITY WIDE
COMMENCEMENT DATE	1 ST JANUARY 2003
REVIEW DATE	ANNUALLY

2. POLICY STATEMENT

POLICY DECLARATION:

Rhodes University has established donor recognition and stewardship programmes that encourage donor participation and a sense of belonging – important components of the relationship-building process. Establishing and nurturing relationships is a sophisticated process that involves thoughtful attention to the donors' interests.

This Donor Recognition and Stewardship Policy has been written to ensure that those who contribute financially to Rhodes University receive recognition that is warm, appropriate, equitable, and consistent. The University will update the policy periodically to ensure that it remains competitive, cost-effective, and results-oriented.

POLICY OBJECTIVES:

Through this Donor Recognition Policy, the University hopes to:

- ◆ cultivate existing donors, to encourage them to increase donation levels
- ◆ attract new donors by creating awareness and interest
- ◆ create and nurture positive relationships with corporate and individual donors
- ◆ establish accountability, which illustrates to donors how their contributions assist the University in achieving its objectives and goals
- ◆ develop a centralized approach for donor recognition and stewardship within a co-ordinated and centralized framework
- ◆ ensure that a single clearly stated policy of recognition is applied at all times.

3. RESPONSIBILITIES

PERSONS/AREAS/DEPARTMENTS/FACULTIES/INSTITUTIONS AFFECTED:

All University staff and departments and faculties as outlined in policy guidelines attached

DIVISION ACCOUNTABLE FOR:

Implementation and Monitoring	Development Division
Exception reporting on non-adherence	Development Division to Management Committee
Review and Revision	Finance and General Purposes Committee
Approval of Revision	University Council

4. BASIC PRINCIPLES AND DEFINITIONS

Donors are individuals, corporations, foundations, trusts, associations and other entities that provide funds to the University for either specific or non-specific purposes.

DONATIONS:

Donations may take several forms including:

- ◆ Bequests
- ◆ Bonds, shares, and other securities
- ◆ Cash
- ◆ Gifts in kind
- ◆ Life insurance policies
- ◆ Real estate

ANONYMITY:

The University agrees to respect and observe a donor's wish for anonymity.

TAX DEDUCTIBILITY:

Where applicable, tax certificates in terms of Section 18A of the South African Income Tax Act will be issued by the University for qualifying donations.

CENTENARY CAMPAIGN 2004:

It is recognised that during the period of the 2004 Campaign a number of additional recognition programmes will be employed in order to properly celebrate donations to the Campaign.

Contributions made specifically to the Campaign that endure beyond 2004 will continue to be appropriately recognised according to these policies.

DONOR RECOGNITION AND ESTABLISHMENT OF PROGRAMMES:

The University has the right to grant appropriate donor recognition. Approval of the Council is required before policies are established, which relate to programmes, physical spaces, naming opportunities, and the style and form of donor recognition to be granted.

Where an endowment has been established or donated to continue a named programme, the recognition will be maintained in perpetuity.

The University has final approval over design, colour, décor, and function of named physical space(s).

All contributions to the University are recognised upon receipt of written pledge form or gift.

PUBLIC ACKNOWLEDGEMENT

When appropriate, recognition may be given in University publications or in outside media. Such recognition is assessed by the Vice-Chancellor, on behalf of Council, on an individual basis taking into account the wishes of donors for anonymity or for marketing opportunities.

CORPORATE SPONSORSHIP

Public recognition in printed materials (e.g., magazines, newspapers, etc.) or in the University's public exterior space will be mutually agreed upon by the Donor and the University.

SPECIAL RECOGNITION

Special requests for recognition by donors will be presented to the Rhodes University Council for review and final approval.

GIFTS-IN-KIND

Gifts in kind are welcomed by the University and receipts will be issued at either "fair market value" or according to current taxation legislation. Recognition benefits will be based on the receipted amount of the gift. An independent appraisal will be provided for items with a value greater than R100 000.

5. PROCEDURES

The attached chart provides an outline of the procedures for recognition for various levels of gifts and donations
