

Fundraising Strategy, Priority Setting and Management Policy

Section 1 - Definitions

(1) For the purpose of this Policy:

- a. AFP - Association of Fundraising Professionals, the international peak body supporting research and professional development for fundraising professionals.
- b. CASE - [Council for the Advancement and Support of Education](#), the international peak body supporting development, alumni relations, marketing and communications in the education sector.
- c. Donations - includes sponsorships, partnerships, in kind contributions and bequest gifts.
- d. Prospect Clearance - policy and process by which prospective donors are assigned to specific staff, based on known information about their interests and potential fits within the University, to ensure that the University does not engage in multiple approaches to the same prospective donors.
- e. Stewardship - relationship management of financial supporters (individuals and organisations) with the goal of building lasting, lifelong relationships.

Section 2 - Policy Statement

Part A - Policy Declaration

(2) Southern Cross University requires strong and continuing private support from alumni, friends, corporations and foundations to help achieve its academic objectives. Private funding is part of a resource generation strategy involving government support, tuition revenue and research funding.

(3) As the University prepares to build a strong base of support for its work, Engagement & Partnerships will align its programs to the Strategic Plan and Priorities of the University. The ultimate establishment of fundraising priorities rests with the Vice Chancellor in consultation with the Vice Chancellor's Executive Committee. This Policy establishes mechanisms and procedures to ensure that all significant projects and proposals are reviewed and considered, that significant fundraising proposals are constructed in terms of the University's Mission and [Strategic Plan](#), that School and College fundraising efforts are compatible with University priorities, that approaches to donors are carefully coordinated through prospect clearance, that the efforts of development officers are directed and informed by the University's priorities and that fundraising programs are managed professionally to ensure optimum success.

Part B - Policy Description

Objectives

(4) The purpose of this Policy is to ensure that the University's fundraising initiatives are mission-based, aimed at raising the private support required to develop and sustain nationally and internationally competitive teaching and research programs, and when executed, to build a sustainable base of financial support from individuals, foundations and organisations.

Scope

(5) The provisions of this policy apply across all areas of the University.

Part C - Content and Implementation

(6) Engagement & Partnerships will work with the Vice Chancellor and the Vice Chancellor's Executive Committee to establish annual fundraising priorities and programs designed to raise the private support necessary to help fulfil the University's [strategic plans](#) and objectives.

(7) Fundraising priorities will be submitted to the Vice Chancellor for approval and tabled for noting with University Council. This plan will form the basis of fundraising programs developed and implemented through the Southern Cross University Foundation.

(8) All fund raising programs will be fully compliant with the terms of the relevant policies and guidelines of Southern Cross University, the requirements of the [Australian Tax Office](#) and guidelines of relevant peak bodies including the [Council for the Advancement and Support of Education \(CASE\) Statement of Ethics](#), [Association of Fundraising Professionals \(AFP\) Donor Bill of Rights](#).

(9) All fundraising programs will be managed and coordinated in close collaboration with the Engagement & Partnerships with a strict adherence to prospect clearance requirements established by that Office.

(10) All fundraising programs at Southern Cross University will emphasise donor stewardship.

(11) The University will strive to attract and retain high-quality development and fundraising staff and to emphasise the highest standards of professional achievement and accountability.

(12) The Office of Development and Alumni Relations will be responsible for maintaining and supporting the University's non-student relationship database, the print and electronic records associated with fundraising programs and for guaranteeing policy and procedures that respect confidentiality and anonymity, in accordance with Australian law.

Section 3 - Procedures

(13) Faculties, Colleges, Schools and Departments that wish to embark on fundraising initiatives must submit a proposal through an established process at Southern Cross University. Projects must first be authorised by the Executive Dean, Deputy Vice Chancellor (Research), Head of School, Director, Research Centre, or by the Director /Manager of non-academic units and contain a standard set of information to ensure that projects meet the strategic objectives and priorities for that College, School, Centre, or Department.

(14) Each Faculty, School, Centre or Department is expected to submit an annual plan which includes proposed fundraising priorities and activities for the information of the Vice Chancellor's Executive Committee and Manager, Alumni and Giving. This exchange of information is essential to the effective coordination of fundraising activities and priorities, and will assist in ensuring the consistency and alignment of Faculty plans with University plans and priorities.

(15) Fundraising Proposals must contain:

- a. a brief description of the project and how it aligns with the University's Strategic Plan;
- b. a proposed timetable for implementation;
- c. a financial target;
- d. prospective donor(s) or specific target audience/sector;

- e. an appropriate School, College or non-academic unit contact(s);
- f. any financial or staff resources allocated to the project; and
- g. comments of Executive Dean or, for non-academic units, the relevant Director /Head of Work Unit.

(16) Once a fundraising proposal has been formally approved, any solicitation of corporations, foundations, or individuals must conform to the University's Prospect Clearance process, as managed by the University Office of Engagement & Partnerships.

Section 4 - Review

(17) This Policy will be reviewed every three years.

Status and Details

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| Unit Head | Triona Maddick Manager, Alumni and Giving +61 7 55893792 |
| Author | Triona Maddick Manager, Alumni and Giving +61 7 55893792 |
| Enquiries Contact | Engagement & Partnerships |