Important Information
For a monetary Gift to be classed as a donation and receive a tax deductible status the Gift must be voluntary and unconditional, and the donor must not receive a material benefit or advantage. Money given for specific purposes or directed towards specific areas of the University is unlikely to qualify as a donation. Donors may be given the opportunity to express a preference; however the University must retain discretion in determining how Gifts are to be used. The University has established the University Associated Entity Fund ("Fund") to disperse grants to registered Entities from received donations.

Basic Requirements for an Entity to be allowed to register with the Fund to apply for a University Grant from donations received.

- Entity must have a Constitution and have an elected committee or have a Trust Deed.
- Entity must be not for profit whose objectives are ultimately for the principal, incidental or ancillary purpose of the University.
- Entity must be aligned or affiliated with a Faculty or Discipline.
- Sporting clubs must be affiliated with the University Sports Association and the University may at its discretion provide information to the University Sports Association Board of Management in relation to a sporting club’s application for a grant, including the outcome of such application.
- An Entity that does not fit within the above two categories must show that their activity has an ongoing community engagement with students or Alumni of the University.
- Entities acknowledge that for privacy reasons, the University cannot give out personal information of donors to Entities unless the donor has granted written permission to do so.
- Entities must accept that the University retains discretion over the use and the dispersing of all Gifts received by the University, even if a Donor has expressed a preference for the Gift to be directed to an Entity.
- Development and Alumni must approve all written text for any electronic or hard copy communication which relates to donations to the Fund. This includes, but is not limited to text for flyers, brochures, web sites, letters and emails. No communication is to be distributed unless written approval is granted.
- Entities must follow their normal process for gaining approval regarding capital works, including building renovations and maintenance. Capital works on University premises must not be undertaken without approval of the University’s Infrastructure, Property and Technology Branch.

In relation to sporting facilities, Sporting Clubs are required to discuss and submit plans for renovations etc with the Sports Association. The Sports Association will consult with the Infrastructure, Property and Technology Branch on requested works.
Process for becoming a registered Entity under the Fund

- Request / Phone call to either Director or Senior Finance Officer of Development & Alumni (D&A).
- Provide contact details to D&A Finance Assistant for sending out of Rules and Assessment Form.
- Completed Assessment Form and Rules must be signed off by 2 of the Entity’s Executive Committee members – (either the President, Secretary or Treasurer) and returned to D&A Finance Assistant.
- D&A Finance Assistant will do any follow-ups that may be required before presenting to the next Fund Committee meeting.
- University Fund Committee will meet and assess applications.
- Fund Committee will send letter to Entity informing of the outcome.
- If Entity’s application is accepted, Development & Alumni will set up the Entity in the D&A database and financial system.

Information in relation to Donors

- The University is happy to receive donations at any time.
- All donations must be accompanied by a University Associated Entity Fund approved donation form issued from the Development & Alumni office only. If this donation form is not provided at the time that the donation funds are received by the University then the donation will be accepted as a ‘general donation’ without a preference which will go into the VC Scholarship Fund.
- To enable a receipt to be generated, the donor’s Name, Address and contact details must be stated on the donation form.
- If the donation form is returned to the Entity, the Entity must promptly forward the form to D&A. The Entity must not copy any donor details from the form.
- Donors should not be given any material benefit or advantage in return for the donation ie no free membership or subscription.
- All Cheques MUST be made out to “The University of Adelaide”.
- Donor will receive a letter of acknowledgement and receipt issued from the Development and Alumni office Donors can elect to have their donation remain anonymous.

Administrative Support and Reporting process

- Development and Alumni is the only receipting location for all donations.
- Development and Alumni is responsible for the invoicing, banking, database input, processing of payments, reporting and acknowledging donors and relationship management.
- Development and Alumni will be responsible for tracking and producing donation statistical
Development and Alumni

University Associated Entity Fund

Rules for University Associated Entity Fund

reports for the University of Adelaide’s Financial Services Branch.

- Development and Alumni will email a report to each Entity at the end of June and at the end of December, stating the total amount of donations received for which that Entity has been nominated as a preference. Donor details will only be provided where permission has been granted by the donor. *This report will not give an automatic entitlement to these funds Entities will only receive funds via approved grants (see below).*

Grant Process

- Applications for Grants can be made at any time but will only be assessed by the Fund Committee on a quarterly basis - second week of the months of Feb/May/Aug/Nov.

- Grant funding will be subject to the availability of funds for the preferred entity. (Minimum of $5,000 required)

- The Fund Committee will assess applications on merit, taking into account their alignment with the University’s objectives, and make recommendations to Associate Director, Financial Services and Director, Development and Alumni. Where unable to make recommendations the Committee will seek direction from the Associate Director, Financial Services.

- The University retains absolute discretion in determining grants.

- Any application that involves Capital Works, roads and buildings as well as building maintenance will not be approved without written confirmation that the University’s Infrastructure, Property & Technology Branch has approved the project.

- D&A will notify Entities of approved Grants and make Grant payments by EFT within 3 weeks of notification.

- Entities must provide an Acquittal Statement stating that all the funds have been used for the purposes for which they were granted.

- If grant monies are used for purposes other than those applied for and approved, then the Entity may be required to repay such monies and / or will have its membership of the Fund revoked.

*These rules have been presented at a formal minuted Committee Meeting and have been agreed upon.*

Entity: _________________________________________________________________

President’s Name: __________________________ Signature: __________________________

Secretary’s Name: __________________________ Signature: __________________________

Date:______/______/______