

POLICY STATEMENT 1 07.02  
COORDINATED BY Office of Development  
EFFECTIVE September 15, 1985  
REVISED May 23, 2000

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SUBJECT: Solicitation and Receipt of Gifts

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## I. PURPOSE

The purpose of this policy statement is to establish guidelines for solicitation and receipt of private, corporate and foundation gifts. This policy statement excludes sponsored research grants.

## II. POLICY

The solicitation of gifts for the University from private sources must be coordinated to prevent duplication and to ensure that gifts are properly acknowledged and that donors are recognized appropriately.

Any potential gift must be evaluated in terms of its impact on the University's mission and the campus environment. The University may accept or reject gifts of any sort; and, depending upon the nature of the gift, it may be necessary to obtain the approval of the LSU Board of Supervisors. Issues to be considered include whether the University might incur a financial, legal or public relations liability. The Chancellor has final approval of all gifts.

## III. GENERAL PROCEDURES

- A. The Office of Development should be consulted concerning appropriate procedures for making gifts to the University. Any faculty or staff member who wishes to solicit or accept a donation should advise his/her supervisor, who will then ensure that the proposal receives approval through administrative channels. The Vice Chancellor for Development serves as a liaison between the University and the community to avoid any conflict, duplication of efforts or confusion.
- B. If the gift is restricted, or is one that would further the work of a particular discipline or Department, the Department Chair or staff member involved should communicate with the Dean of the College or his/her supervisor who would then bring the matter to the attention of the Provost, Vice Chancellor for Business Affairs and the Vice Chancellor for Development.

The Vice Chancellor for Student Affairs and the Director of Student Financial Aid should be included in the discussion if scholarships are involved.

In such matters, the initial proposals may be developed by the Vice Chancellor for Development or other appropriate staff and then submitted through channels for recommendation to the Chancellor. The proposals should indicate, at least in broad outline, how monies, equipment or property will be handled so that the Business Office is fully informed and agrees to the procedures. Scholarship guidelines must include the purpose, amounts, duration, selection criteria, method of selecting recipients and designation of receipts.

- C. In evaluating gift proposals of real property such as buildings, land, and equipment which impact the campus environment, the Vice Chancellor for Business Affairs works closely with the Vice Chancellor for Development to analyze the impact on the University budget, insurance liabilities, building use and other University concerns.
- D. The Dean of the Library must evaluate all gifts to the Library to determine if they will compliment the university collection.
- E. All gifts of cash, stocks and bonds, or other securities intended for the University, must be approved by the University and must be deposited in appropriate university accounts or in the accounts of the LSUS Foundation.
- F. All gifts must be routed through the Office of Development for processing and deposit.

#### IV. SOLICITATION AND RECEIPT OF GIFTS

- A. The University actively solicits gifts from individuals, foundations, and corporations. Gifts may be solicited by members of the university community, the LSUS Alumni Association or the LSUS Foundation.
- B. Faculty and staff are encouraged to generate ideas for gift solicitation and to make initial contacts; however, all solicitation efforts should be cleared through the Office of Development to avoid multiple solicitation of donor prospects and to ensure that the University administration is aware of contacts with the public for solicitation of gifts. Colleges, Departments, the Library and individual members of the university community should consult with the Office of Development to develop gift ideas into proposals. The

Office of Development coordinates such proposals with the appropriate campus offices, such as Academic Affairs, Business Affairs, Student Affairs, and Student Financial Aid.

- C. When solicitation results in the offer of a gift to the University, the Office of Development works with the appropriate campus representative and the donor to ensure that the gift is properly received and deposited; that acknowledgment of the gift is made by the University; that appropriate tax documentation is provided; that acceptance by the LSU Board of Supervisors is obtained when necessary; and that media coverage is secured when desired by the University and donor.
- D. When solicitation results in the establishment of an endowment, the Office of Development works with the donor and with the Offices of Academic Affairs and Business Affairs to ensure that the endowment is established and maintained in accordance with the wishes of the donor and the legal requirements of the University and the policies of the LSU Board of Supervisors, the Board of Regents and the LSUS Foundation.

#### V. ESTABLISHMENT OF FOUNDATIONS AND NONPROFIT CORPORATIONS

Without prior university approval, no foundation or outside group, except the LSUS Alumni Association and the LSU in Shreveport Foundation, shall be empowered to use the name of the University or its official address for the purpose of soliciting, receiving or distributing gifts. The Articles of Incorporation and the By-Laws of the LSUS Foundation and the LSUS Alumni Association may be consulted for further guidance.

#### VI. SOURCES

By-Laws and Regulations, of the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College, Chapter VI, "Gifts and Grants" dated July 16, 1999.

APPROVED Martin E. Albritton, Jr. DATE May 23, 2000

Martin E. Albritton, Jr.  
Vice Chancellor for Development

APPROVED Vincent J. Marsala DATE 5-23-00

Vincent J. Marsala  
Chancellor