

# **The University Development Policy on the Acceptance of Gifts and Donations**

Approved by the University Council on March 18, 2016

Approved by the Board of Trustees on May 9, 2016

## **Purpose of Policy**

As a private, non-profit Maronite Catholic institution of higher education in Lebanon, Notre Dame University-Louaize (NDU) relies on the generosity of alumni and friends to carry out its academic and social mission of universal quality education. The University thus welcomes gifts and donations from individuals (alumni, friends, parents of students), foundations, associations and business organizations to meet some of its operation costs, and to build on its track record of success and maintain a solid financial footing in the long-term.

## **Policy Statement & General Guidelines**

The University's acceptance of gifts and donations is guided by a commitment to the highest standards of integrity and transparency, to the mutual benefit of donor and University. In order to ensure that the spirit of philanthropic giving is consistent with the University's academic mission and public role, the following guidelines have been developed to reflect the fundamental principles that guide the University's relations with donors and supporters:

1. The University welcomes gifts and donations that support its academic mission foremost, while preserving University autonomy over academic decision-making, including institutional planning, administrative procedures, and operations. The University considers gifts and donations that restrict academic freedom, or that compromise its public role, to be contradictory to its mission and values.
2. The University, while grateful to the generosity and intended support for its mission, reserves the right to decline donations and gifts that result in an actual or anticipated conflict of interest. "Conflict of interest" is hereby defined as the resultant action, or set of actions, that violate the spirit of due process and deliberation governing hiring or promotion decisions, curricular development, delivery of learning, services, and the over-all strategic direction set by the University.
3. In accordance with the University's identity as a Maronite Catholic University in the American Liberal Arts tradition, with a vital national role, the University welcomes gifts and donations that comply with the highest ethical conduct in the derivation of such gifts or donations, such as a respect for human rights and human dignity, a concern for social welfare, community development, and corporate responsibility.
4. The University attests that all gifts and donations may be used solely as designated by the donor. As example, restricted gifts and donations will be used for the purpose to which such gifts and donations were explicitly designated by the donor upon pledge, such as direct aid for needy students. Gifts bearing names ("named gifts"), including capital or commemorative gifts, shall be determined by the donor. All bequests shall be honored according to the deceased person's wishes and shall bear the name in his or her honor.

5. As a matter of University policy, all gifts and donations will be made public in relevant University publications, including University website and *Annual Report*. Donors reserve the right to recommend means of handling the public disclosure of gifts and donations, and reserve the right to remain anonymous.
6. The University welcomes corporate giving as a way of strengthening the bond between higher education and industry, but reserves the right to decline gifts or donations that promote the commercialization of learning, or that serve to promote commercial interests within the purview of academic life, as these contradict the University's academic identity and mission.

### **Accepted Gifts and Donations**

The University works in partnership with donors to accept gifts and donations that fall into the following general categories:

- a. **The Endowment Fund:** Contributions to **NDU's Endowment Fund** further the University's financial stability by building long-term principal that accrues over time but may not be spent. Only revenue proceeds resulting from invested portions of the Endowment, such as interest earned, may be used to support University financial needs.
- b. **Restricted Donations:** These are financial gifts that (a) are expendable at the time of receipt by the University for the current fiscal year, unless otherwise specified by the donor; and (b) are specified by the donor at the time of pledge as targeting a particular University need. Restricted donations often specify support for financial aid and scholarships, academic units and programs, or new initiatives. Non-capital named gifts also fall under this category.
- c. **Unrestricted Donations:** Similar to restricted donations, unrestricted donations are expendable at the time of receipt for regular University expenditures; however, the University is free to determine appropriate targets of support, according to University needs and priorities.
- d. **In-Kind Gifts:** These are non-financial gifts to the University that strengthen the University's academic mission. Specialized archival or book collections, proprietary bequests, equipment, and services of various kinds often fall under this category.
- e. **Capital Funds:** These are gifts that (1) directly support University construction of facilities, such as new Faculties, research laboratories, residence halls, and sports complexes; and (2) significantly contribute to the renovation, aesthetic enhancement, and modernization of existing buildings and grounds. Donors wishing to make a gift in his or her name, or to commemorate the memory of a loved one, traditionally make a named gift to this fund.

### **Processing Gifts and Donations**

The Office of Development (OD) is the principal unit responsible for the processing of gifts and donations. The OD works together with the Office of the President and all other units concerned to furnish donors with needed information for informed decision-making and follow-up

activities, including campus visits and prearranged presentations of the University's strategic needs. The following is a compendium of the OD's role in the handling of gifts and donations:

- a. Conveys the needs and aspirations of the entire University to alumni, parents, friends, and institutions.
- b. Manages and coordinates development activities, decisions, and solicitations.
- c. Forwards all relevant information to donors who wish to make a gift to the University; the OD arranges for follow-up meetings and information sessions, and coordinates and facilitates with all units concerned.
- d. Ensures that gifts and donations comply with agreed-upon donor directives at the time of pledging to NDU.
- e. Vets unsolicited gifts and donations to particular University units or programs for consistency with the University's mission, long-term goals, and overall strategic direction.
- f. Keeps a record of all gifts and donations.
- g. Coordinates with the American Friends of NDU (AFNDU) chapters in the United States and the Friends of NDU Foundation Canada (CAFNDU) for gifts and donations made originating in North America. Pursuant to this, the OD manages the legal transaction of all such gifts in accordance with U.S. and Canadian laws.
- h. Asserts that all monetary gifts and donations are made payable to Notre Dame University-Louaize.

If a question arises with respect to the guidelines set for the acceptance of gifts or donations, the matter will be referred to the President for final action.

**Appendix A<sup>1</sup>:  
Contribution Form**

**Please accept my gift of**

US\$20       US\$50                       US\$100       US\$1,000      Other

**My gift to Notre Dame University-Louaize is to support:**

- The Endowment Fund
- Restricted Gifts
- Unrestricted Gifts
- In-Kind Gifts
- Capital Funds
- Others: \_\_\_\_\_ (please specify)

**All gifts help support the University's academic mission. Please choose one of the following payment options:**

**Cash or Check.** Please make checks payable to Notre Dame University-Louaize and return to us in the enclosed envelope.

**Credit Card.** Card type:               Visa     MasterCard  
Card #:   Exp. Date \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

Signature of Cardholder \_\_\_\_\_ Date \_\_\_\_\_

**Bank Transfer:**

Byblos Bank, Zouk Mosbeh Branch, NDU Acct No. XXXX-XXXX-XXXX Swift: XXXX XXXX

**Online Donation.** Please visit our secure website: [www.ndu.edu.lb/giving](http://www.ndu.edu.lb/giving)

**Donor Information.** Please provide your name as you would like it to appear in NDU's *Annual Report*.

Name \_\_\_\_\_ Maiden Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone #:      Home \_\_\_\_\_      Mobile \_\_\_\_\_      Business \_\_\_\_\_  
                    Fax \_\_\_\_\_      E-mail: \_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_

<sup>1</sup> Appendix A is not part of the University *Development Policy on the Acceptance of Gifts and Donations*.

## **Appendix B<sup>2</sup>:**

### **Contact Information**

#### **Lebanon**

Office of Development,  
Notre Dame University-Louaize,  
P.O. Box 72, Zouk Mikael,  
Lebanon.

Phone: 961 9 208999, Ext. 2121

961 9 218950, Ext. 2121

E-mail: [giving@ndu.edu.lb](mailto:giving@ndu.edu.lb)

#### **United States of America**

American Friends of NDU  
1629 K Street NW, Suite 300  
Washington, DC 20006  
U.S.A.

Phone: (202) 349-1705

E-mail: [dc-office@ndu.edu.lb](mailto:dc-office@ndu.edu.lb)

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<sup>2</sup> Appendix B is not part of the University *Development Policy on the Acceptance of Gifts and Donations*.