



Policy Chapter: Chapter 9 Institutional Advancement

Policy Number and Title: 09.002 Fundraising and Private Support

I. Policy Statement

Philanthropic support is essential to the University of North Texas. Contributions from individuals, corporations, foundations, and other organizations are vitally important to the fulfillment of the University's mission. This policy is intended to facilitate, coordinate, and manage fundraising activity so that donor intent aligns with University priorities. Through an intentional and strategic process, individuals, organizations, corporations, and/or foundations will be solicited and stewarded in a consistent and coordinated manner.

II. Application of Policy

This policy applies to all fundraising conducted on behalf of the University by employees and private support received by the University but excludes student organization fundraising which is managed by the Division of Student Affairs.

III. Policy Definitions

A. Conditional Gifts

"Conditional Gifts," in this policy, means gifts or pledges that place requirements on the institution to perform some task or take some sort of action that it might not otherwise initiate. A conditional gift may also depend on some future event over which neither the institution nor the donor may have control. Examples of conditional gifts or pledges are challenge gifts (conditional on a specific amount of funds being raised before the gift is fulfilled), gifts for new capital projects (that have not yet been approved) or creating new programs (that have not yet been approved). Conditional gifts will be carefully tracked but will not be considered a gift until the conditions are met or removed.

B. Endowments

"Endowments," in this policy, means a fund where the principal is designated, by the donor, to be held in perpetuity or for set terms as specified in a gift instrument, and is not wholly expendable by the institution on a current basis.

C. Fundraising

"Fundraising," in this policy, means an intentional and strategic process to solicit gifts and philanthropic grants for any University purpose from private sources such as individuals, organizations, corporations, and/or foundations. This policy applies to all forms of fundraising for the benefit of the University.

D. Gift

“Gift,” in this policy, means a voluntary, philanthropic transfer of assets received from an individual, a corporation, a foundation, or other organization. A gift may be made through a number of vehicles, including but not limited to cash, stock, estates, trusts, in-kind, and real estate.

E. Grant

“Grant,” in this policy, is an award of assets to UNT that may require performance of specific duties including but not limited to research, budget reports, detailed financial reporting, and return of unused funds.

F. Unrestricted Funds

“Unrestricted Funds,” in this policy, means funds received by the University or the UNT Foundation, Inc. that are not restricted for a specific use by operation of law, institutional policy, directive of the donor, or by the terms of the contract. The funds may be received from a planned gift, or royalty, copyright, patent, or other contract payments.

G. Foreign Source Gifts and Contracts

“Foreign Source, Gifts, and Contracts” or “Foreign” source, in this policy, refers to any foreign government or its representative, any foreign legal entity, any individual who is not a citizen or national of the United States, or any agent acting on behalf of a foreign source. This includes entities and individuals that operate under the jurisdiction of a foreign government, as well as those who may have significant influence or control from foreign entities. The term also encompasses agents who act on behalf of these foreign sources, ensuring that all potential foreign influences are accounted for in compliance and reporting procedures.

IV. Policy Responsibilities

A. Fundraising Oversight and Coordination

1. University Advancement (UA) is responsible for overseeing all fundraising on behalf of the University. This includes the coordination of solicitations and proposals to individual, corporate, and foundation prospects. All fundraising activity (excluding solicitations of governmental grants and sponsored projects) is to be coordinated through the Vice President for University Advancement (VPUA) or their designee. The VPUA will coordinate with other University and UNT System employees as necessary and appropriate. University employees who engage in fundraising activities on behalf of the University must coordinate with, and have their efforts approved by, UA. Non-employees wishing to fundraise on behalf of the University must contact University Advancement and obtain written permission prior to engaging in such efforts.
2. The VPUA or their designee will determine the appropriate person to undertake the solicitation of individual, corporate and foundation prospects on behalf of the University. University employees are responsible for complying with solicitation and gift acceptance procedures established by UA.

3. All fundraising projects must comply with UNT System Regents Rules, UNT Policies, University Advancement's Solicitation and Gift Acceptance processes, as well as federal and state laws.

B. Gift Acceptance

1. The acceptance of gifts must be coordinated through University Advancement's Gift Acceptance Committee (GAC) (excluding gifts related to governmental grants and sponsored projects). The authority to accept gifts for the benefit of UNT is vested in the Board of Regents, but the Board has authorized the President of the University to accept gifts under the conditions for acceptance set out in this policy and the Regents Rules (with the exception of gifts of real estate, which must be received by the Board of Regents in accordance with [Regents Rule 11.300](#)). The President has delegated the acceptance of gifts of \$500,000 or less to the VPUA. The VPUA must ensure that all gifts comply with UNT System Regents Rules, UNT Policies, University Advancement's Solicitation and Gift Acceptance processes, as well as federal and state laws
2. Gifts or contracts must not be accepted from entities owned or controlled by prohibited nations, listed by the Texas Comptroller, or otherwise restricted by law.

C. Gift Processing and Reporting

All University faculty and staff are responsible for forwarding all gifts and gift documentation to Gift Administration within University Advancement for recording, receipting, acknowledgement, and reporting purposes within two business days of receipt. This also includes items such as estate plans and distribution documentation.

D. Gifts from a Foreign Source

Advancement Services within University Advancement must report all gifts from a foreign source in accordance with [Regents Rule 09.400](#). Further, in accordance with [20 U.S.C. §1011\(f\)](#) and [Texas Executive Order GA-48](#), all gifts from a foreign source with an aggregate value of \$250,000 or more within a calendar year must be reported to the U.S. Department of Education and the Texas Higher Education Coordinating Board. UA must coordinate with the Office of Research to ensure that foreign gift reports are appropriately submitted using the Federal Student Aid's Electronic Application in accordance with [20 U.S.C. §1011\(f\)](#).

All foreign gifts must be screened against prohibited source lists, ownership and control must be verified, the source of funds must be documented, required certifications must be obtained, and timely reports must be filed.

E. Tax Deductibility Statement

All written statements about tax deductibility of contributions and/or values and benefits received with a gift must be generated by Gift Administration within University Advancement.

F. Use of Gifts and Unrestricted Funds

A gift must be used for the purpose designated by the donor. All unrestricted gifts are to be used as designated by the Board of Regents and upon the recommendation of the President (or their designee). Gift Policy and Compliance within UA will draft and execute all gift details with the appropriate gift documentation.

G. Endowments

1. New endowment funds benefitting the University should be held by the UNT Foundation, Inc. Funds held by, or for the benefit of, the University must meet or exceed the required minimum gift level for an endowment before funds can be endowed. The required minimum gift level to establish an endowment fund is \$30,000. Required minimum gift levels for named endowments are outlined in [UNT Policy 09.001, Naming](#).
2. Gifts to create an endowment must be received within a five-year period, with a minimum of \$18,000 received within the first three years. Exceptions may be made to this five-year pledge schedule by the VPUA for gifts under \$500,000, or by the President upon the recommendation of the VPUA if the gift is \$500,001 or more.
3. Endowments will begin to earn income once gift documentation is fully executed and at least \$5,000 has been received. Distributions will start after the end of the first full fiscal quarter once the University's required minimum gift level for the specific endowment type is met.

H. Named Expendable Scholarships

Named expendable scholarships must be a commitment of no less than \$10,000 or a five-year commitment of \$2,000 annually. Smaller gifts for the purpose of scholarships may be submitted in memory or honor of an individual to an existing endowment or an area's general scholarship fund.

V. Resources/Forms/Tools

[University Advancement](#)

[University Advancement Gift Acceptance Processes](#)

[University Advancement Naming Guidelines](#)

VI. References and Cross-References

[20 U.S.C. § 1011\(f\), Disclosures of Foreign Gifts](#)

[Texas Executive Order GA-48](#)

[UNT System Board of Regents Rule 09.100, Gifts and Grants](#)

[UNT System Board of Regents Rule 09.200, Naming of Property, Programs, and Academic Positions](#)

[UNT System Board of Regents Rule 09.300, Endowment Funds](#)

[UNT System Board of Regents Rule 09.400, Gifts from Foreign Sources and Persons](#)

[UNT System Board of Regents Rule 11.300, Real Property Acquisition](#)

[UNT Policy 09.001, Naming](#)

[UNT Policy 10.010, Endowment](#)

VII. Revision History

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