

California State University Dominguez Hills
Gift Acceptance Policy and Procedures

Introduction

California State University Dominguez Hills represents a major resource for the Los Angeles basin. The campus is steadily building its image as a home for lively, vital ideas that respond to an ever-changing, contemporary society. As our message about the University's quality is carried to an external constituency, it is natural that we will experience increased support from individual, corporate, and foundation donors.

In order to maintain the University's image and reputation for excellence, it is necessary that these donors be cultivated, solicited, and acknowledged in a unified manner. So that we will all follow the same procedures for the acceptance and acknowledgement of gifts, we have developed the following guidelines. It is our hope that you will read these guidelines carefully. Please adopt them in your dealings with donors.

Gifts of Cash

Gifts of cash include checks, money orders, drafts, and actual cash. These gifts will frequently come to the University through an individual department in order to support a specific program, or they may be given to an individual faculty member or department chairman in support of, for example, a special scholarship fund.

When you or your Department receives a gift of cash, you are responsible for completing the Cash or Cash Pledge Gift Acceptance Form (sample attached) and depositing the check to the Foundation Office immediately. You will be given a receipt.

Please note on the form the Foundation account number into which the check is to be deposited and if a matching gift is expected. You must also attach the original donor letter and a copy of the check deposited to the Foundation.

The Development Office maintains all donor files for the University; therefore it is imperative that the office be given this information.

It is also critical that gifts to the University be acknowledged immediately. The Development Office will assume this responsibility. Gifts from \$25 to \$999 will be acknowledged by the Associate Director of Development. Gifts of \$1,000 and above will be acknowledged by the Director of Development and the University President. These acknowledgements will be mailed no later than 48 hours after the Development Office receives notification of the gift.

You should assume responsibility for sending either a personal or departmental acknowledgement – whichever is appropriate. Please send a copy of this letter to the Development Office so it can be placed in the donor's file.

Matching Gifts

All matching gift acknowledgement forms should be forwarded to the Development Office. The Development Office will be responsible for obtaining Foundation or University approval, whichever is appropriate, and returning the form to the donor and a copy to the department. The Development Office will also be responsible for tracking matching gifts to ensure that the appropriate department is credited with the matching gift when it is received. This is particularly critical when a donor combines several matching gifts in one check, but will be disbursed to several departments.

Gifts of Equipment (In-kind gifts)

When your department or support group receives a proposal from a donor to transfer ownership of equipment, you are requested to fill out a Gift-in-Kind Acceptance Form (sample attached). These forms are available from the Development Office.

The Gift-in-Kind Acceptance Form will help you determine if your department wishes to accept the gift. You will be responsible for the cost of installation, maintenance, repair, and any facility modification that is necessary to accommodate the gift. The form will also help you outline anticipated costs.

Once you have filled out the form, it should be routed for appropriate signatures. When all signatures have been obtained, the Gift-in-Kind Acceptance Form should be brought to the Development Office. The Development Office will distribute the appropriate copies. The gift will then be accepted by the Foundation and, in most cases, title will be transferred to the University.

When the gift is valued at \$5,000 or over, the Development Office will send a letter to the individual or corporate donor informing them that they are required to file IRS form 8283. The Foundation will send your department a memo as a reminder that the Foundation must be notified if the equipment is sold within two years after receipt. This is because the Foundation is required to file an information return with the IRS and the donor within 90 days of disposition. A description of the property sold, amount received and date of disposition is needed.

As with gifts of cash, the Development Office will acknowledge all accepted gifts in kind.

Gifts of Promissory Notes, Securities or Real Property

The authority to accept the above gifts has been delegated by the President of the University to the Director of Development and University Relations*

***Currently, the Director of Development.**

The evaluation and acceptance of these kinds of gifts is sometimes complex and can involve legal counsel. A department or support group which receives a proposal from a donor to transfer ownership of the above-mentioned gifts should immediately contact the Director of Development and University Relations* at extension 3787.

Overview of Gifts of Cash

1. A gift of cash is received by a department or support group.

- (Pink) A) School Dean/Division or Department Head – For Personal Acknowledgment
 B) Foundation Director – For Accounting Purposes (White)
 C) Director of Development – For President/University Acknowledgment (Green & Canary)

I. STATUS OF DONOR:

- Alumni Concern
 Parent Foundation
 Employee/Emeriti Foundation
 Other Individual
- Corporate/Business
 Other Organization
 Company
 Fund Raising Consortia
 Private
 Other: _____
 Religious Organization

II. NAME & ADDRESS OF DONOR:

Name: _____

Title: _____

Business: _____

Street Address: _____

City, State, Zip: _____

Phone Number: () _____

III. TYPE OF GIFT:

Cash: \$ _____ Cash Pledge of: \$ _____
 Payable on: _____

Date of Gift Received: _____ Foundation Account Number: _____

IV. GIFT RESTRICTIONS: list the department, activity or function that will utilize these funds.

V. AUTHORIZATION TO PUBLISH RECEIPT OF GIFT IN UNIVERSITY REPORTS:

- List donor & amount (description of gift)
- Anonymous

Gift-In-Kind Acceptance Form

California State University, Dominguez Hills

For reporting gifts of personal property or services. Please complete form in its entirety. **SUBMIT FORM, GIFT DOCUMENTATION AND ACKNOWLEDGEMENT INSTRUCTIONS TO THE OFFICE OF UNIVERSITY RELATIONS AND DEVELOPMENT.**

From: _____ Dept/Division: _____
_____ Date of Gift: _____

Donor's Name and Address: _____

Status of Donor:

_____ Alumni _____ Other Individual _____ Company
Foundation _____ Fund Raising Consortia

_____ Employee/Emeriti _____ Other Organization _____ Non-Company
Foundation

_____ Parent _____ Corporate/Business Concern _____ Religious
Organization

Gift Value\$ _____ Description of Gift

IF GIFT IS OF *PHYSICAL PROPERTY* AND FOR VALUES OVER \$250.00, PLEASE FILL OUT THE FOLLOWING AND OBTAIN THE SIGNATURES REQUIRED:

Space and Facilities: describe space and facilities to be used for this equipment: the need for new utility connection, special installations or alteration, and indicate how such costs will be defrayed.

Space Now Available? _____ Yes _____ No Building _____ Room _____ or attachment

Installation Requirements/Costs: _____ or attachment

Operating and Repair Costs: Describe probably amounts needed or operation, repair or maintenance and electrical requirements.

See (c) on attachment

_____ or attachment

Restrictions: Are there any restrictions to the acceptance of this gift? See Administrative Code Section on attachment:

_____ Yes _____ No or attachment

RECOMMENDATIONS:

1. School Dean/Division or Department Head _____ Date _____ Yes _____ No

2. CSUDH Foundation _____ Date
 Yes _____ No _____
 Transfer Title to University? _____ Yes _____ No

3. Fiscal Affairs _____ Date
 Yes _____ No _____
 Transfer Title to University? _____ Yes _____ No

_____ Date

_____ Yes _____ No

4. CSUDH Property Clerk

State I..D. # _____ Property Log # _____

5 **Director of Development**

Yes

No

Date

Originator Keep **goldenrod** copy. Send others as follows: **white** Foundation; **green** Director of Development; **Canary** to Dean or Division/Department head; **pink** to CSUDH Property Clerk.