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.
2. The gift is immediately brought to the Foundation Office for deposit, along with the following:

   For the Development Office:
   a. Cash or Cash Pledge Gift Acceptance Form – green copy
   b. Original donor letter
   c. Copy of check

   For the Foundation Office:
   a. Foundation deposit memo
   a. Cash or Cash Pledge Gift Acceptance Form – white copy
   b. Copy of donor letter
   c. Copy of check

3. The Foundation will verify that the proper fund account has been specified for the deposit.

4. The Foundation will forward the information to the Development Office, which will acknowledge the gift within 48 hours.

5. You may also acknowledge the gift. If you send a letter to the donor, please send a copy to the Development Office for our records.

6. Send canary copy of Cash or Cash Pledge Gift Acceptance Form to Dean or Division Head; pink to Department/Division Chair; keep goldenrod copy.

7. The gift should be reflected in the monthly account statement your department receives from the Foundation Office. If it is not, notify the Foundation Office immediately.

*Director of Development, extension 2114

California State University, Dominguez Hills
Cash or Cash Pledge Gift Acceptance Form

From: ____________________________________________

______________________________
Name and
Department Extension Date

Directions:
1) Fill out this form completely.
2) Fill out and attach a Foundation Deposit Memo.
3) Attach copies of the donor’s letter and check (and a copy of your personal acknowledgment if available
4) Forward all materials to the Foundation (ERC C-518).
5) Keep bottom copy (goldenrod) for your records.

The remaining copies of this form will be distributed as follows:
A) School Dean/Division or Department Head – For Personal Acknowledgment (Pink)
B) Foundation Director – For Accounting Purposes (White)
C) Director of Development – For President/University Acknowledgment (Green & Canary)

I. STATUS OF DONOR:
☐ Alumni ☐ Corporate/Business Concern
☐ Parent ☐ Company
☐ Foundation ☐ Fund Raising Consortia
☐ Employee/Emeriti ☐ Private
☐ Other Individual ☐ 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

________________________________________________________________________

4. CSUDH Property Clerk
<table>
<thead>
<tr>
<th>State I.D. #</th>
<th>Property Log #</th>
</tr>
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</table>

5 **Director of Development**

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Date</th>
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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.