

## **GIFT ACCEPTANCE PROCEDURES (REV. 10/06)**

1. Gifts are received by the department or sent directly to the Advancement Office by the donor. Next, a Cash Gift Securities form or a Gift-in-Kind Acceptance form is completed by the department or by Advancement.
2. If received by a department, the gift is delivered to the Advancement Office or placed in an envelope in Advancement's folder in the Dean's Office. (Gifts are never placed in campus mail).
3. The gift is logged by the Advancement Office and given to the Advancement Director for signature with the gift stapled to the front of the form (if possible where the address is shown on the form).
4. The Advancement Director reviews the paperwork and signs off on the gift.
5. A duplicate Check/Cash Delivery Log is completed and the scooter service is scheduled from Advancement Services.
6. A copy of the Check/Cash Delivery Log is returned from Advancement Services after they log and initial each gift.
7. The gifts typically appear on the acknowledgement download in 1-2 weeks. More complicated gifts may take longer.
8. Data is downloaded into an excel spreadsheet at the beginning of each week and mail merged into the acknowledgement letters from the dean. The letters are placed a signature file. The Dean only sends acknowledgements for department gifts that are over \$1000 or any amount to the college in general.
9. Midweek, John Rau in Advancement Services emails the formatted BSR reports for all of CAED to the CAED Advancement Coordinator, which is then forwarded to respective departments.
10. The departments acknowledge all the donors for their area.

\*\*Tax forms are sent at the end of the year by Advancement services.  
Below are the forms associated with this process:

[http://advancement.calpoly.edu/forms/ua\\_cash\\_form.doc](http://advancement.calpoly.edu/forms/ua_cash_form.doc)  
[http://advancement.calpoly.edu/forms/ua\\_gik\\_form.doc](http://advancement.calpoly.edu/forms/ua_gik_form.doc)  
[http://advancement.calpoly.edu/forms/ua\\_gik\\_policy.pdf](http://advancement.calpoly.edu/forms/ua_gik_policy.pdf)