

Memo to: All UH-Downtown/PS Holders
From: Max Castillo, President
Subject: Gift Acceptance and Processing

UH-Downtown/PS 09.A.01
Issue No. 5
Effective date: 08/23/2004
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1. PURPOSE

The purpose of this Policy Statement is to set forth policies and procedures for processing gifts to the University of Houston-Downtown (UHD).

2. DEFINITIONS

“Gifts” shall include cash, publicly traded securities, closely held securities, real property, personal property, and other property accepted upon the recommendation of the UHS Office of University Advancement. See SAM 03.F.01, Gift Acceptance Policies.

3. POLICY/PROCEDURES

3.1 All gifts and original supporting documentation received by faculty and/or staff must be hand delivered to the Office of University Advancement within one business day of receipt.

3.2 Gifts-in-kind may be forwarded to the beneficiary department. It is the responsibility of the department business manager to ensure that appropriate inventory measures are taken. Donor name, contact information, estimated value of gift, and receiving department shall be forwarded within one business day of receipt to the Office of University Advancement.

3.3 The Office of University Advancement will be responsible for processing gifts in the following manner:

3.3.1 Transmit check/pledge to the University of Houston System Treasury for deposit and transmittal to the Gift Records System, accompanied by a completed “Gift Transmittal” form indicating the purpose of the gift and the account designation, with copies of applicable documentation.

3.3.2 Prepare an acknowledgement (stewardship) letter from the President to the donor(s).

3.3.3 Notify the appropriate University department(s) and the Vice President for Administration of receipt of the gift.

3.3.4 Coordinate the stewardship reporting process.

3.4 The UH System Donor and Alumni Records department will prepare and will mail to the donor the official receipt for the gift.

3.5 Each gift with a value of \$5,000 or more (excluding pledges) will be reported to the Board of Regents on a Gift Report.

4. REVIEW AND RESPONSIBILITIES

Responsible Party (Reviewer): Executive Director of University Advancement

Review: Biannually



President

Policy History

Issue #1: 07/01/1993

Issue #2: 12/20/1994

Issue #3: 07/24/2000

Issue #4: 06/01/2004