Memo To: All UH-Downtown/PS Holders
From: William Flores, President
Subject: Gift Acceptance and Processing

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, other property, and deferred gifts accepted upon the recommendation of the UHS Office of University Advancement. See SAM 03.F.01, Gift Acceptance Policies.

3. POLICY

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

4. PROCEDURES

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

4.1.1 Record the gifts and deposit non-endowment cash/checks with the UHD Cashier’s Office. Send endowment gifts, by express courier, to UHS Treasury for deposit.

4.1.2 Transmit check/pledge/gift backup documentation, by secure upload, to the UHS Donor and Alumni Records department for entry to the Gift Records System. Include a completed “Gift Transmittal Form” for each gift, indicating the purpose of the gift and the account designation.

4.1.3 Prepare an acknowledgement (stewardship) letter from the appropriate university official to the donor(s), based on dollar amount.

4.1.4 Notify the appropriate University department(s) and the Vice President for Administration of receipt of the gift.
4.1.5 Coordinate the stewardship reporting process.

4.2 The UHS Donor and Alumni Records department will prepare and will mail to the donor the official receipt for the gift.

4.3 Per Board of Regents Policy 32.03, each gift with a value of $5,000 or more (excluding pledges) will be reported to the Board of Regents on a Gift Report. The UHS Donor and Alumni Records department is responsible for preparing the Gift Reports.

5. EXHIBITS

There are not exhibits associated with this policy.

6. REVIEW PROCESS

Responsible Party (Reviewer): Vice President for Advancement and University Relations
Review: Every three years on or before May 1st.
Signed original on file in Employment Services and Operations.

7. POLICY HISTORY

Issue #1: 07/01/1993
Issue #2: 12/20/1994
Issue #3: 07/24/2000
Issue #4: 06/01/2004
Issue #5: 08/23/2004

8. REFERENCES

Board of Regents Policy 32.03
UH SAM 03.F.01
Gift Transmittal Form