

Memo To: All UH-Downtown/PS Holders
From: Dr. Loren J. Blanchard, President
Subject: Gift Acceptance and Processing

UH-Downtown/PS 09.A.01
Issue No. 8
Effective date: 09/17/2021
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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, other property, and deferred gifts accepted upon the recommendation of the UHS Office of University Advancement. See [SAM 08.A.03](#), Gift Acceptance.

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 using the check scanner. 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 Gift Processing and 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 Gift Processing and 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 Gift Processing and Records department is responsible for preparing the Gift Reports

5. REVIEW PROCESS

Responsible Party (Reviewer): Vice President for Advancement and University Relations

Review: Every three years on or before May 1

President

6. 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
Issue #6: 05/20/2015
Issue #7: 09/09/2020

7. REFERENCES

[Board of Regents Policy 32.03](#)
[UH SAM 08.A.03](#)
[Gift Transmittal Form](#)