

# GIFT-IN-KIND ACCEPTANCE FORM

- **In-kind gifts of \$100 or more to Cal Poly must be reported to University Advancement immediately upon receipt using this form.**
- **Never include estimated cash value of gift in acknowledgement letter to donor.**
- **Please review the *Gift-in-Kind Acceptance Policies and Procedures* at [http://advancement.calpoly.edu/ua\\_gik\\_policy.pdf](http://advancement.calpoly.edu/ua_gik_policy.pdf) and *Gift-in-Kind Acceptance Form Checklist (attached)* prior to filing this form.**

<u>Advancement Services Office Use:</u>	
Entity ID _____	
Assoc Donor _____	Assoc Type _____
Alloc _____ \$ _____	Source _____
Type _____	Tender _____ GIK Type _____

1) DONOR INFORMATION:	2) RELATIONSHIP TO UNIVERSITY
Donor _____	<input type="checkbox"/> ALUM <input type="checkbox"/> FACULTY/STAFF
Company Contact _____	<input type="checkbox"/> FDN <input type="checkbox"/> CORP/CORP FDN
Title _____	<input type="checkbox"/> PARENT <input type="checkbox"/> FRIEND
Address _____	
Phone (____) _____ - _____ Ext. _____	

**3) GIFT INFORMATION:**

Describe the gift indicating the quantity, model number, manufacturer, etc., and whether it needs space, additional support, material and/or service to operate. (Attach a separate sheet if necessary)

**4) GIFT VALUE:**

Estimated value: \$ \_\_\_\_\_ Written documentation from donor establishing the value of the gift must be attached. All gifts from individuals valued more than \$5,000 must include an appraisal.

5) VALUATION METHOD (Check one):	6) GIFT RESTRICTIONS (Check one):
<input type="checkbox"/> Appraisal	<input type="checkbox"/> Donor stipulations or limitations <span style="color: red;">(Attach donor statement on detail of stipulation or limitation)</span>
<input type="checkbox"/> Itemized inventory list	<input type="checkbox"/> Gift to be retained and used for designated purpose
<input type="checkbox"/> Vendor/Donor documentation (invoice, letter)	<input type="checkbox"/> * Gift may be sold, proceeds used for designated purpose
<input type="checkbox"/> Published value (catalog, etc.)	<input type="checkbox"/> * Gift will be sold and proceeds used for: _____
	* SS# or TIN _____ must be included for individuals who have contributed gifts-in-kind valued more than \$5,000 that may or will be sold

7) DONEE OF GIFT (Check one):	8) DESIGNATED FOR (Check one):
<input type="checkbox"/> University	<input type="checkbox"/> Department: _____
<input type="checkbox"/> Foundation – FDN Fund # _____ <span style="color: red;">(Internal Use Only)</span>	<input type="checkbox"/> College: _____
<input type="checkbox"/> Corporation – CPC Fund # _____ <span style="color: red;">(Internal Use Only)</span>	<input type="checkbox"/> Other: _____
<input type="checkbox"/> ASI	
<input type="checkbox"/> Club/ Student Organization	

<b>Gift received by:</b> _____	_____
Name - Department - Extension (Please print)	Date gift received
<b>Approved by:</b> _____	_____
Department Head Signature / Club Advisor (Sign and print name)	Date approved
_____	_____
College Dean or Development Officer Signature	Date approved

Send completed form and accompanying documents to: **Advancement Services, Heron Hall - Room 103 (117/103).**  
**Official tax receipt for each gift \$250 and above will be sent to the donor by the Advancement Services office.**

**Acceptance Authorization** \_\_\_\_\_ Date accepted \_\_\_\_\_  
VP, Administration & Finance or Executive Director, Corporation or CFO, Foundation or ASI Director Signature

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## GIFT-IN-KIND ACCEPTANCE FORM

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### GIFT-IN-KIND ACCEPTANCE FORM CHECKLIST

- Please be certain that all eight sections of the form are complete and that the appropriate names and signatures are in place.
- Attach all documentation supporting the acceptance of this gift.
- In the Gift Restrictions section, the SS# (Social Security number) or the TIN (Taxpayer Identification number) must be included for individuals who have contributed gifts-in-kind valued more than \$5,000 that may or will be sold.
- In the Donee of Gift section, be certain that the appropriate donee of gift has been checked.
  - *The University (the state) is the donee for gifts of equipment that will be used to enhance the education of the students on the campus and gifts-in-kind that will directly benefit the University.*
  - *The Cal Poly Corporation is the donee for gifts of equipment that will be used for the enterprise ventures on the campus and for all gifts of animals except for gifts of horses to the rodeo program.*
  - *The Cal Poly Foundation is the donee for gifts-in-kind that will benefit any restricted gift account, discretionary account, endowment account, and charitable trust.*
  - *ASI is the donee for gifts-in-kind contributed to ASI programs.*
  - *Clubs/ Student Organizations is the donee for gifts-in-kind contributed to student clubs.*

In the supporting documentation, please include sufficient information about the gift to make it clear why the University, Foundation, Corporation, ASI, or Club/ Student Organization was selected as the donee. If you have questions regarding the appropriate donee for a particular gift, please contact the Advancement Services Office at ext.6-2713.