

# GIFT-IN-KIND ACCEPTANCE FORM

*(for internal use only)*

- All in-kind gifts to Cal Poly valued at over \$100 must be reported to University Advancement immediately upon receipt using this form (either Part A or A&B).
- Never include estimated cash value of gift in acknowledgement letter to donor.
- Please review the general Gift Acceptance Policies and Gift-in-Kind Acceptance Procedure at: [Gift-in-Kind Acceptance Procedure](#)

Advancement Services Office Use:

Entity ID \_\_\_\_\_

Assoc Donor \_\_\_\_\_ Assoc Type \_\_\_\_\_

Assoc Donor \_\_\_\_\_ Assoc Type \_\_\_\_\_

Alloc \_\_\_\_\_ \$ \_\_\_\_\_ Source \_\_\_\_\_

Type \_\_\_\_\_ Tender \_\_\_\_\_ GIK Type \_\_\_\_\_

## **PART A- TO BE COMPLETED FOR EVERY GIFT IN-KIND**

<b>DONOR INFORMATION:</b> Donor _____ Company Contact _____ Title _____ Address _____ Phone _____ Does the Donor wish to remain anonymous? ___ Yes ___ No	<b>RELATIONSHIP TO UNIVERSITY:</b> <input type="checkbox"/> Alumnus <input type="checkbox"/> Faculty/Staff <input type="checkbox"/> Foundation <input type="checkbox"/> Corp/Corp Fdn <input type="checkbox"/> Parent <input type="checkbox"/> Friend
<b>GIFT INFORMATION:</b> Describe the gift indicating the quantity, model number, manufacturer, etc. (attach a separate sheet if necessary.) _____ _____	

**GIFT VALUE:**

Estimated value: \$ \_\_\_\_\_. **Written documentation from donor establishing the value of the gift must be attached. If value exceeds \$5,000 completion of PART B of the Gift In-Kind Form is REQUIRED.**

<b>VALUATION METHOD (Check one):</b> <input type="checkbox"/> Itemized Inventory List <input type="checkbox"/> Vendor/ <a href="#">Donor documentation</a> <input type="checkbox"/> Published value (catalog, etc.) <input type="checkbox"/> Qualified Appraisal (required for gifts of \$5000 and more)	<b>GIFT RESTRICTIONS (Check one):</b> <input type="checkbox"/> Donor Stipulations or limitations ( <b>Attach donor statement</b> ) <input type="checkbox"/> Gift to be retained and used for designated purpose <input type="checkbox"/> Gift may be sold, proceeds used for designated purpose <input type="checkbox"/> Gift will be sold and proceeds used for: _____ <i>*SS# or TIN _____ must be included for individuals who have contributed gifts-in-kind valued at more than \$5,000 that may or will be sold.</i>
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**DONEE OF GIFT (Check one):**

**DESIGNATED FOR (Check one):**

- State- Account# \_\_\_\_\_
- Foundation- Account# \_\_\_\_\_
- Corporation- Account# \_\_\_\_\_
- ASI- Account# \_\_\_\_\_
- Club/Student Organization

- Department: \_\_\_\_\_
- College: \_\_\_\_\_
- Other: \_\_\_\_\_

If gift will be tangible property or goods, provide the proposed location of property or describe space needed (incl. department, building, room, etc):

\_\_\_\_\_

Cost and description, if any, of moving, delivery, or space alterations:

\_\_\_\_\_

**PART B- TO BE COMPLETED FOR EVERY GIFT IN-KIND VALUED OVER \$5,000**

**Qualified Appraisal for this gift must be attached, dated within 60 days of the date of gift**  
 (If the donor is a corporation or business, may substitute and attach inventory list, invoice or letter)

**Does this gift require approval from the Gift Acceptance Committee? YES/NO**

See Gift-in-Kind Acceptance Procedure at: [Gift-in-Kind Acceptance Procedure](#)

**Gift Acceptance Committee approval is required if the gift is:**

- A. An Export Controlled Item
- B. A Patent, Copyright, Trademark or other Technology Right
- C. A Work of Art or Collection

**Received by:**

\_\_\_\_\_  
 (sign and print) extension number Date

**Acceptance Recommended by:**

\_\_\_\_\_  
 Department Head Signature/Club Advisor (sign and print) Date

\_\_\_\_\_  
 Dean (sign and print) Date

Send completed form and accompanying documents to: **Advancement Services, Heron Hall**

**Acceptance Authorization :** \_\_\_\_\_

VP Administration & Finance, Executive Director Corporation, AVP Advance Operations, or ASI Exec Director

\_\_\_\_\_ Date Approved