

Instructions for Completing the Gift Form

This form is to be used under two conditions: 1) for all non-monetary gifts (in-kind gifts, non-cash gifts of tangible or intangible property) received by the UO Foundation and the University of Oregon; 2) for monetary gifts (cash/checks) that will be deposited into a State index through the Cashiers Office. Do not use this form if the monetary gifts will be deposited into a UO Foundation equity; in this case, call the UO Foundation (ext. 2015) to receive the proper forms.

For policies and procedures involving the acceptance of gifts, please refer to <http://baowww.uoregon.edu/gifts.htm>.

Complete the Report of Gift form located on the web at <http://baowww.uoregon.edu/forms.htm> or obtain a copy from any of the following offices: UO Foundation Office of Gift and Records Management, UO Development Office, UO Cashier, or UO Office of Donor Relations.

Determine if the gift is monetary (cash / check) or non-monetary (in-kind or real property) and select the appropriate check box at the top of the form. Refer to policies and procedures noted above. [NOTE: If the non-monetary gift is received for a construction project, it must be coordinated with the Capital Construction Group at Facilities Services.]

Date of Gift, Donor's Name & Address - Provide the date of the gift, donor's name and donor's address. If the donor wishes to be anonymous, you are required to complete and attach the Anonymous Gift Worksheet (you can obtain a copy of this worksheet from the UO Foundation or the Office of Donor Relations).

University Department/Program - Identify the name of the University Department / Program for whom the gift is donated.

Research/Grant Related - If the gift is Research or Grant related (e.g. as supplemental support or to be counted as matching funds or costshare), provide the Project Name or Grant Number.

Gift Amount, Description of Gift and Expected Use of Gift - Refer to policies and procedures noted above. Please note the document requirements for in-kind gifts in excess of \$5,000.

Physical Location of Gift - If gift-in-kind, provide the physical location of the asset(s).

Foundation Equity or Name – All gifts are ultimately processed by the UO Foundation to ensure that university donors receive proper gift credit and recognition. All gifts must be assigned a UO Foundation equity so that appropriate acknowledgement occurs. For example, a gift-in-kind to the Biology Department would use equity 201126 Biology Department Fund. If you do not know the equity number, simply supply the name. Please also add the Fund, Organization Code, and Inventory Number (if applicable) for all gifts (see below for details).

Department Index and Account Code - The Department Index and Account Code should be completed if you've received cash (currency or check) at your department and are depositing it with the Cashiers Office.

Fund, Organization Code and Inventory Number – Identify the Fund and Organization Code where the gift revenue will be recorded. For non-monetary gifts, the fund number also determines if the equipment should be included in the equipment reserves. If gift-in-kind and the value of the gift is determined to be \$5,000 or greater, the entity receiving the Report of Gift form (i.e. UO Foundation or UO Business Office) will forward the relevant documents to Property Control for inventory and asset management. If your department has a block of inventory numbers, you will assign the inventory number; however, for those departments with no blocks assigned an Inventory Number will be assigned by Property Control.

Comments - Provide any additional comments relevant to the gift. If the donor wants the gift to be in memory or in honor of someone, you can note that here.

Gift Received By - Provide the name of the individual who received the gift on behalf of the University.

Gather the university signatures required on the form, and forward the completed document to Cashiers in the Business Affairs Office.