“To improve is to change; to be perfect is to change often.”

- Winston Churchill
WHAT’S NEW AND WHY?

1. Implementation of ticketing system
2. Streamlined approval process
3. Revised forms

The In-Kind Gift process is part of University Advancement’s commitment to ensuring compliance with Chancellor’s Office policy, IRS Publication 526, CSU Chico’s Gift Acceptance Policy as well as the Council for Advancement and Support of Education guidelines. In-kind gifts can pose a risk and financial liability to campus if the appropriate procedures are not followed.
REVISED PROCESS (SIMPLE GIFTS)

If the gift is for a special event or auction, the originator will complete the General Use In-Kind Gift form.

The process is complete.

If the gift is not for a special event or auction, the originator will submit an In-Kind Gift Acceptance service request.

The service request will be reviewed by University Advancement.

If no special conditions exist (e.g., hazardous materials, building modifications, etc.) the originator will be directed to complete a General Use In-Kind Gift Form.

The process is complete.
GENERAL USE FORM

When will you use this form?

- Special Events
- Auctions
- Upon direction from University Advancement after completing a ticket request
REVISED PROCESS (COMPLEX GIFTS)

1. Submit an In-Kind Gift Acceptance service request.
2. The request will be reviewed by University Advancement.
3. The originator will be directed to complete a Pre-Authorization form.
4. Once the form has been completed and signed, the originator will upload it to the request.

- The request will be reviewed by the appropriate department contact(s).

   If the gift is approved, the originator will be notified by University Advancement that they may proceed with accepting the gift. Process is complete.

   If the gift is conditionally approved, the originator and dean/unit administrator will be notified. The dean/unit administrator will be asked to provide approval if the conditions will cost the department money. Process is complete.
PRE-AUTHORIZATION FORM

When will you use this form?

- Upon direction from University Advancement after completing a ticket request
WHERE DO I GO TO SUBMIT A SERVICE REQUEST?

support.csuchico.edu
Only a couple more slides...
GIFT PROCESSING STAFF

- Victoria “Vicki” Ambadekar - Gift Processor x6252
- Corey Gurule - Gift Processor x5099
- Veronica Rabo - Office Coordinator x3293

x4488 rings on all three of our phones, it is the fastest way to get a hold of someone!
HOW TO OPEN MAIL

- Open mail in pairs (one person opens the mail, and one person logs checks)
- Use a “Check Log” to track mail received. See example on next page.
- Complete a Donation Deposit form (one form may be used for multiple checks)
- You will take the form, checks, and any back up provided with the check to Cashiering in the Student Services Center Room 230.
<table>
<thead>
<tr>
<th>Date</th>
<th>Time Received</th>
<th>Check Number</th>
<th>Donor Name</th>
<th>Donation Amount</th>
<th>Initials of Logger</th>
<th>Initials of Mail Opener</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/27/2017</td>
<td>3:00 PM</td>
<td>1234</td>
<td>Sample Donor</td>
<td>$ 1,000.00</td>
<td>AB</td>
<td>CD</td>
</tr>
</tbody>
</table>

**Total** | $ 1,000.00
Please **DO NOT** make copies of checks.

If it is imperative for you to have a check copy on hand, make sure you obscure the routing and account numbers.
Thank you for your time!