



Procedure Number:	CS 502
Procedure Title:	External Gifts Procedure
Relevant Board Policy:	C.1.3 Appropriations and Revenue Sources Relevant
SACSCOC Principle:	5.2.c Control of fund-raising activities
Originating Unit:	Office of Resource Development
Maintenance Unit:	Office of Resource Development
Contact for Interpretation:	Director of College Grant Development

- I. Purpose/Definition(s): Northeast Lakeview College receives cash, in-kind, and other types of gifts from external sources for development, maintenance, and initiation of college events and programs. This policy does not apply to pass-through gifts—gifts that are intended for distribution to students, faculty, or staff. The following steps should be followed for receiving and processing non-pass-through gifts.

- II. Procedure Statement: Gifts may be initially received by various departments, but in all cases will be given to and processed by Resource Development for submission to the Alamo Colleges Foundation. As the district's only 501C (3) tax entity, the Alamo Colleges Foundation receives donated gifts and provides donors with the relevant charitable donation tax documentation required by the Internal Revenue Service.
 - A. Check/Cash donations received from external sources:
 1. Resource Development must record any check or cash donation and deliver it, with the Donation Transmittal Form, to the Alamo Colleges Foundation's Resource Development Office within three days following receipt of the check or cash donation from the President's office. The Alamo Colleges Foundation staff provides a copy of the donor form and check/cash stamped with a date the Foundation received the check /cash to the Resource Development employee who then files the copy.
 2. Resource Development updates donor records and issues an official gift receipt/acknowledgement to the donor. The Alamo Colleges Foundation also issues a letter to the donor with the IRS charitable tax contribution information.
 - a) All checks should be made payable to Northeast Lakeview College and mailed to Resource Development, Northeast Lakeview College 1201 Kitty Hawk Rd., Universal City, TX 78148.
 - b) All checks mailed to any department in the College must be forwarded to the Office of Resource Development within three business days. Original documentation, including envelopes and gift forms that accompany the check, must be forwarded with the check.
 3. The Office of Resource Development updates relevant departments of gifts via email.

B. In-kind donations received from external sources:

1. The department soliciting/receiving the gift should contact The Office of ORD in order to request an In-Kind Donation Form or can access the form from the Alamo Colleges Foundation sharepoint site

III. The Office of Resource Development determines department responsibilities and proper internal handling of the gift. The department provides the estimated value of the gift and/or any donor contact information available that would help determine the value on the In-Kind Donation Form.

- A. The relevant department completes the In-Kind Donation Form and delivers the form and gift to the Office of Resource Development for review.
- B. The In-Kind Donation Form and gift is delivered to the Alamo Colleges Foundation for deposit/disposition.
- C. The Office of Resource Development updates relevant departments of the status of the gift and its availability for use via email.

Attachment: Donation Transmittal Form

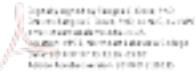
Originator: Patrick Murray

Date Approved: 4/23/19

Last Updated: 5/21/19

Approved: Tangila C. Dove, PhD

Title: Vice President of College Services



 ALAMO COLLEGES FOUNDATION	DONATION TRANSMITTAL FORM / DEPOSIT LOG				<input type="checkbox"/> Cash <input type="checkbox"/> Check ANONMYOUS <input type="checkbox"/> Credit Card <input type="checkbox"/> <input type="checkbox"/> In-Kind <input type="checkbox"/> Stock
	Please refer to the Instruction Sheet for information about how to complete this form				
	Questions? Please call 210.485.0044				
Donor Information	Total Transaction	Fund/Account No.	Donation Amt.	Non-Gift Amt.	Please have tribute set up
Const ID:					<input type="checkbox"/> In Honor of <input type="checkbox"/> In Memory of
Donor:					Name:
Preferred Salutation:	Letter Code:		FMV Benefit: \$		<i>check one and add designated name or Fund/Project # on right:</i>
Address:	Proposal Name:				
City, State Zip:	Campaign ID:		<input type="checkbox"/> Scholarships		ID #:
Phone:	Event ID:		<input type="checkbox"/> Programs		<input type="checkbox"/> Matching gift form attached
Email:	Appeal:		<input type="checkbox"/> Other		
Soft Credit:	Package:		In-Kind Description:		<input type="checkbox"/> Pledge payment (if 1st add frequency, start & end dates)
Org Contact:	Org Contact Title:		Const. Code(s):		
Primary Solicitor:	Secondary Solicitor:		Foundation Staff Contact:		Initials/Date:
Notes (alumni, soft credit address, etc.):					
 ALAMO COLLEGES FOUNDATION	DONATION TRANSMITTAL FORM / DEPOSIT LOG				<input type="checkbox"/> Cash <input type="checkbox"/> Check ANONMYOUS <input type="checkbox"/> Credit Card <input type="checkbox"/> <input type="checkbox"/> In-Kind <input type="checkbox"/> Stock
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Donor Information	Total Transaction	Fund/Account No.	Donation Amt.	Non-Gift Amt.	Please have tribute set up
Const ID:					<input type="checkbox"/> In Honor of <input type="checkbox"/> In Memory of
Donor:					Name:
Preferred Salutation:	Letter Code:		FMV Benefit: \$		<i>check one and add designated name or Fund/Project # on right:</i>
Address:	Proposal Name:				
City, State Zip:	Campaign ID:		<input type="checkbox"/> Scholarships		ID #:
Phone:	Event ID:		<input type="checkbox"/> Programs		<input type="checkbox"/> Matching gift form attached
Email:	Appeal:		<input type="checkbox"/> Other		
Soft Credit:	Package:		In-Kind Description:		<input type="checkbox"/> Pledge payment (if 1st add frequency, start & end dates)
Org Contact:	Org Contact Title:		Const. Code(s):		
Primary Solicitor:	Secondary Solicitor:		Foundation Staff Contact:		Initials/Date:
Notes (alumni, soft credit address, etc.):					

Advancement Services

Questions? Please call 210.485.0044

General Procedures

Please print legibly or complete form electronically

Use separate forms to transmit cash, checks and credit cards

DO NOT HOLD DONATIONS. THEY MUST BE DEPOSITED DAILY AT YOUR RESPECTIVE LOCATION

Form

Donor Information

Please provide the donor's identification number in Advancement's Raiser's Edge system, if available.

Provide donor biographical information, if not on check or correspondence.

Spouses will automatically be soft credited. Please provide any additional soft credits that should be entered adhering to Advancement Policy

Total Transaction

The total amount of the check or the full amount to be charged on a credit card

Fund/Account No.

The appropriate RE Fund /FE Project account number should be provided in which the funds should be posted to. All donations must have campaign and appeal codes.

The RE Fund / FE Project account name should correspond to the purpose of deposit.

If an account is not yet open for the specific purpose of the transaction, please write INTERIM PROGRAM 300044 OR INTERIM SCHOLARSHIP 600079 in this field. These are temporary holding accounts until the appropriate account is established. No expenses may go against this fund.

Proposal Name or Constituent ID: Please provide if the proposal does not reside on the donor in order to link the transaction to the proposal.

Event ID: Please provide the fundraising event id to have the transaction linked to a Raiser's Edge Event.

Appeal and Package: Please provide if the solicitation appeal is not listed on the correspondence.

Donation Amount

On Fundraising transactions, please provide the amount of the donation (including benefit amount).

Per Advancement Policy, please disclose in the benefit field the amount of goods or services extended to the donor in connection with the donation; as well as its description. The benefit amount will be applied to the first donation amount listed. This information will be stated on the tax receipt.

If the benefit amount is equal or greater than the donation amount, the transaction should be placed in the non-gift amount column.

Non-Gift Amount

Non-gift transactions currently cannot be processed through Raiser's Edge. They will be manually journaled into the funds/accounts.

No tax receipts will be issued and no donor recognition credit will be provided.

Additional Information

Please check if the donation is in honor or in memory of someone.

If the donation should be linked to the honoree or person being memorialized, that person should have a constituent record established with the appropriate tribute set up.

Please provide their record id number or name.

If the donor wishes to remain anonymous, please check. This will prevent donations from generating on gift logs and honor roll.

If a matching gift form has been provided by the employee, please check and attach it to the transmittal form. The Matching Gift Coordinator will properly complete and submit all MG forms on behalf of the district. Matching gifts are placed in the same account as the original gift unless restricted by company or district policy.

If donation is a payment on a pledge, please check/make that notation.

Notes

Please provide any special handling of the transaction

Please complete the prepared by section, as this will be the person contacted should any questions arise during processing.