

SAP 21.05.01.T0.01 Gift Solicitation and Acceptance



New/Approved: July 24, 2018
Next Scheduled Review: July 24, 2023

Procedure Statement

This standard administrative procedure (SAP) supplements System Policy 21.05, *Gifts, Donations, Grants and Endowments*, and System Regulation 21.05.01, *Gifts, Donations, Grants and Endowments*, that provide members of The Texas A&M University System (System) with authority, guidance and restrictions for the acceptance of gifts, donations, grants, and endowments.

Reason for Procedure

This SAP outlines authority and guidelines for the acceptance of gifts, donations, grants, and endowments on behalf of Tarleton State University (Tarleton or university).

Procedures and Responsibilities

1. GENERAL

- 1.1 The president has delegated authority for soliciting, accepting, accounting for and acknowledging charitable contributions on behalf of the university to the vice president for institutional advancement and designees.
- 1.2 University employees are required to consult with the vice president for institutional advancement and the Office of Development (Development) before engaging current or prospective donors. These entities are responsible for the coordination of donor engagement and should be aware of contacts made across the university in order to avoid multiple contacts/solicitations.
- 1.3 The vice president for institutional advancement is responsible for advising the president and working collaboratively with the vice president for finance and administration to ensure that only gifts for acceptable university purposes are entertained for acceptance.

2. GIFT SOLICITATION

- 2.1 Standardized gift solicitation procedures shall be followed by Development to ensure fundraising programs and solicitation of funds benefitting the university protect the interests of the donor and avoid an excessive number of solicitations in the name of Tarleton State University.
- 2.2 University employees involved in development activities and donor relations are required to consult and strategize with the Office Advancement Services (Advancement Services) and Development before soliciting donors.

3. ACKNOWLEDGEMENT OF DONORS

The vice president for institutional advancement, the president and/or most appropriate university representative will sign correspondence to donors acknowledging gifts, donations or endowments. Advancement Services is responsible for facilitating and coordinating all donor acknowledgements and receipts, and promoting further stewardship with departments.

4. RECORDKEEPING AND REPORTING

- 4.1 With the exception of sponsored research contracts, Advancement Services will deposit, record and receipt all gifts, donations, and endowments to the university. These duties shall be segregated in compliance with standard audit procedures.
- 4.2 Record keeping and reporting of external funding in the form of grants are managed by the Office of Business Services, in collaboration with the Office of Research Grants and Sponsored Projects.
- 4.2 Gifts to the Tarleton State University Foundation, Inc. (Foundation) are managed by Foundation staff. Advancement Services coordinates with the Foundation to acknowledge gifts to the Foundation and reports them according to System policy.
- 4.3 Advancement Services will obtain appropriate documentation for non-cash items and provide the donor with a written acknowledgement.
- 4.3 Business Services will record all cash gifts, non-cash items, donation, grants or endowments in accordance with all relevant System policies, regulations and accounting standards, and prepare all required gift reports and disclosure requirements, including the required reporting to The Texas A&M University System Board of Regents.

5. COMPLIANCE WITH FEDERAL AND STATE LAWS AND SYSTEM POLICIES

- 5.1 The vice president for institutional advancement is responsible for maintaining internal controls and ensuring compliance with all Federal and State laws, System policies, regulations and industry standards pertaining to gifts, donations, and endowments to the university.

- 5.2 The Office of Business Services, in collaboration with the Office of Research Grants and Sponsored Projects, is responsible for ensuring the university will maintain internal controls to ensure compliance with all Federal and State laws and System policies and regulations pertaining to grants.
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Related Statutes, Policies, or Requirements

[System Policy 21.05, Gifts, Donations, Grants and Endowments](#)

[System Regulation 21.05.01, Gifts, Grants, Donations and Endowments](#)

Contact Office

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