



## Standard Administrative Procedure (SAP)

### 21.05.01.L1.01 Gifts, Donations, Grants and Endowments

*First Approved:* September 5, 2012

*Last Revised:* N/A

#### ***Standard Administrative Procedure Statement***

This SAP provides Texas A&M International University departments with the proper procedures for the acceptance of gifts, donations, grants, and endowments.

#### ***Definitions***

This SAP outlines procedures for obtaining approval for gifts, donations, grants, and endowments and describes a process of notification to appropriate parties.

#### ***Procedures and Responsibilities***

##### 1. General

University departments and individuals are responsible for notifying the VP for Institutional Advancement of all cash and non-cash gifts.

##### 2. Approval Process

- 2.1 The System Office of General Counsel must approve all new trusts/bequests and gifts of intellectual property before routing of the appropriate acceptance forms described in 2.2.
- 2.2 The VP for Institutional Advancement will initiate a "Request for Authority to Accept Non-Cash Gift or Restricted Gift of \$50,000 to \$1,000,000, other than Real Property" when the property value is in excess of \$250,000 or when the gift involves a partial sale/partial gift transaction greater than \$50,000 but less than \$250,000, and a "Request for Authority to Accept Gifts \$1,000,000 or Greater other than Real Property," when appropriate. The System Real Estate Office must approve all gifts of real estate, and will initiate the "Land/Mineral Gift/Bequest Form." All cash gifts will be immediately receipted by the Office of Institutional Advancement. All non-cash gifts that require preliminary acceptance will not be receipted until the Office of Institutional Advancement has a copy of the approval request form signed by all parties.
- 2.3 The VP for Institutional Advancement will follow-up with the System Office of Budgets and Accounting to ensure that the appropriate signatures are obtained by the reporting deadline.

### 3. Records Retention

- 3.1 The VP for Institutional Advancement will retain a copy of the request form and forward the original to the President for signature. Upon approval by the President, the request form will be forwarded to the System Office of Budgets and Accounting for routing to System Office of General Counsel, System Chief Business Officer, and in the case of gifts over \$1,000,000, the Chancellor.
- 3.2 The System Office of Budgets and Accounting will retain the signed original approval request form as back-up for the agenda item. Copies will be faxed or emailed to the Advancement Information Services Specialist and VP for Institutional Advancement.
- 3.3 For non-cash gifts, the Advancement Information Services Specialist will also forward a copy of the signed approval request form and the supporting documentation to the VP for Institutional Advancement.

<b><i>Related Statutes, Policies, Regulations, Rules or Requirements</i></b>
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System Regulation 21.05.01 Gifts, Donations, Grants and Endowments

<b><i>Contact Office</i></b>
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