



## Property Management Office

### Donation Checklist

Checklist to ensure proper documentation for incoming donations of equipment.

1. Section one and two to be completed by Department and/or Department Property Administrator (DPA) within 30 days of receipt of donated equipment. (Note: Vehicle donations must be reported to PMO within 5 business days)
2. Section three to be completed by the Property Management Office.

#### Section One – Donor/Department Information

Department Receiving Donation \_\_\_\_\_ Date Received \_\_\_\_\_  
DPA Name \_\_\_\_\_ PI Name \_\_\_\_\_  
Dept. Gift PTA (Note 3c) \_\_\_\_\_ Capital Equipment (See note 1 & 2) \_\_\_\_\_  
Donor Name \_\_\_\_\_ Donor Tax ID# \_\_\_\_\_

Documents Attached: (Check all that apply) (See note 2, 3, 4, 5)

_____ Letter of Intent (from Donor)	_____ Photo of donated equipment
_____ Donation Agreement (if any)	_____ Packing List/Shipping Documents
_____ Itemized List of All Equipment Being Donated	_____ IRS 8283 Form (Applicable upon donor request)
_____ Proof of Value (i.e. Appraisal, Invoice, Receipt)	_____ Other (Please specify)

#### Section Two – Department & DPA Accounting Process

1. Scan all documentation (checked off in section one) into a single pdf file.
2. Identify capital equipment items, and tag with Stanford Barcode tag and Donation overlay.
3. Create a one dollar (\$1.00) Standard Capital Purchase Requisition in iProcurement with the following requirements:
  - a. **Select:** Non-Catalog Request- **Category:** Standard.Capital Equipment
  - b. Use Donor's name for vendor name
  - c. Must use a Gift account within range **GAAAA-JXZZZ**
  - d. Only use Expenditure type (ET) 53125
4. Create an on-line receiving event in Oracle iProcurement once PO is generated.
5. Create record(s) in Sunflower (SFA) property management database.
  - a. Use *Receiving date* for *Acquisition date*
  - b. Acquisition method must be Donation
  - c. Attach photo(s) of equipment, and list other associated tag numbers (if any) in the comments section of record.
6. Forward completed form with all documentation to your designated Property Programs Manager (PPM) in the Property Management Office.

#### Section Three – PMO Accounting Processing

1. Review packet received from Department, assign donation number.
2. Reconcile with department any missing documentation/data (i.e. Paperwork, SFA records, forms etc.)
3. Establish acquisition cost/Fair market value (FMV) for each item of capital equipment (if applicable).
4. Identify and annotate value of non-capital equipment from itemized list.
5. Generate "DONATIONS-CAPITAL FMV TEMPLATE" and send to Accounts Payable.
6. Notify Office of Development (OOD) via copy of completed documentation packet.
7. Notify PMO accounting to generate records in Oracle Fixed Assets.
8. Verify photo(s) of donated equipment attached to record(s).
9. Update internal Donation tracking spreadsheet, AND verify backup files saved to folder.

#### Section Four – Notes and References

Notes:

1. Capital Equipment: Defined as value greater than or equal to \$5000; Useful life greater than 1 year.
2. Itemized list of equipment should include BOTH capital and non-capital equipment being donated.
3. Departments may not sign IRS or Donor acknowledgment forms. Please forward to PMO for signature.
4. OOD sends gift receipt and acknowledgment letter to the donor.
5. Departments should avoid any statements to donor regarding value of donated equipment.
6. PMO reserves the right to accept or decline donated assets on a case by case basis.

References:

1. Administrative Guide Memo Chapter 4-Gifts
2. Property Manual Chapter 2-Acquisitions