

Gift Cover Form

FOR INTERNAL USE ONLY

This form is to be used to notify Gift Services of a new gift or pledge, **ONE FORM PER FINANCE TRANSACTION.**

Email completed form to Gifts Services donations@uq.edu.au

Completed by

Staff Name: _____ **Date Form Completed:** _____

Donor Information

Name: _____ **Raiser's Edge ID:** _____

- | | |
|---|--|
| <input type="checkbox"/> Address & Contact Details | <input type="checkbox"/> Relationships |
| <input type="checkbox"/> Constituent Codes | <input type="checkbox"/> Proposal has been added / updated |
| <i>(Donor must have at least one of Student, Alumni, Staff, Parent, Friend, Organisation, Company, Foundation – Gift Services to apply Donor codes)</i> | |
| <input type="checkbox"/> Anonymous Donor | |

Donor Information has been added/updated on Raiser's Edge **Sign:** _____
It is the Fundraiser's responsibility to update this information on RE

Gift Information

Gift Amount AU\$ _____ **Date:** _____ Anonymous Gift
(of donor confirmation)

Gift Type
 Cash/Cheque/Credit Card Pledge Stock/Property Gift in Kind Recurring Gift Other

| <input type="checkbox"/> CASH Payment Method: <input type="checkbox"/> Cash <input type="checkbox"/> Cheque <input type="checkbox"/> Bank Transfer <input type="checkbox"/> Online <input type="checkbox"/> Credit Card <input type="checkbox"/> Other Date of Tender: _____ | <input type="checkbox"/> PLEDGE Specified Schedule: <i>including first payment date</i> <table border="1" style="width: 100%;"> <tr> <th style="width: 50%;">Instalment Date <small>(or start date & frequency)</small></th> <th style="width: 50%;">Instalment Amount \$AUD</th> </tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table> Payment Notification Method <input type="checkbox"/> Invoice <input type="checkbox"/> Pledge Reminder <input type="checkbox"/> Verbal Reminder Notification By: <input type="checkbox"/> Gift Services <input type="checkbox"/> PPM <input type="checkbox"/> Contract & Grants | Instalment Date <small>(or start date & frequency)</small> | Instalment Amount \$AUD | | | | | | | | | | | <input type="checkbox"/> RECURRING GIFT Frequency: <input type="checkbox"/> Fortnightly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually First Instalment: <i>Payment processing normally occurs on 10th business day of each month</i> |
|---|--|---|----------------------------|--|--|--|--|--|--|--|--|--|--|---|
| Instalment Date <small>(or start date & frequency)</small> | Instalment Amount \$AUD | | | | | | | | | | | | | |
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Documentation Donor Letter Expression Of Intent Sponsorship Agreement Valuation Will Report
Please attach all gift documentation in line with Gift Acceptance Procedure (to be developed)

Campaign: _____
Details overleaf

Donor Intent: _____

Existing RE Fund (if known): _____

Proposal Name: _____
What proposal should this gift be linked to on RE?

Name of Solicitor(s): *The solicitor(s) that were involved in raising the gift.* _____

Solicitation Method
 Personal Approach
 External Approach
 Unsolicited

Soft Credit Name: _____ **RE ID:** _____

Soft Credit Name: _____ **RE ID:** _____

Gift Acceptance

I Print Name: _____ certify that:
 The gift meets the requirements to be outlined in the Gift Acceptance Procedure
 I am authorised to accept this gift on behalf of The University of Queensland

Signature: _____ **Dated:** _____

How to assign a Campaign: A gift should be assigned to the campaign it is to be counted against.

| <u>Description</u> | <u>Start Date</u> | <u>Goal</u> | <u>Must be recorded on RE</u> | <u>Rules for allocating income</u> |
|---|-------------------|-------------|-------------------------------|--|
| UQ Philanthropic Income | | | | |
| Principal Giving | 01/01/YEAR | Yes | Yes | Gifts raised by Principal Giving Team (gift aim \$1,000,000+) |
| Major Giving | 01/01/YEAR | Yes | Yes | Gifts raised by Major Giving Team (gift aim \$50,000 – \$999,999) |
| Leadership AG Program | 01/01/YEAR | Yes | Yes | Gifts raised by Leadership AG Appeal Giving or Leadership AG Team or donor is a Leadership Programme Prospect (gift aim \$1,000 – \$49,999) |
| AG Program | 01/01/YEAR | Yes | Yes | Gifts raised by Appeals that are included towards Annual Giving Program, Online Giving, Workplace Giving, Staff Giving. Gifts over \$1,000 and/or solicited by another team to be checked and may be moved to Other Giving, Leadership AG Programme or Principal Giving (gift aim up to \$1,000) |
| Bequests | 01/01/YEAR | Yes | Yes | Bequest Giving |
| Other Giving | 01/01/YEAR | No | Yes | Gifts that are not a result of Annual Giving Programs. This may include In Memoriam Giving, In Honour Giving, unsolicited non-staff gifts, gifts solicited by Spokes or gifts solicited by academics |
| UQ Fundraised Income | | | | |
| Principal Sponsorships | 01/01/YEAR | Yes | Yes | Sponsorships raised by Principal Giving Team |
| Principal Research Contracts (Phil element) | 01/01/YEAR | Yes | Yes | Research Contracts raised by Principal Giving Team |
| Major Sponsorships | 01/01/YEAR | Yes | Yes | Sponsorships raised by Major Giving Team |
| Major Research Contracts (Philan element) | 01/01/YEAR | Yes | Yes | Research Contracts raised by Major Giving Team |
| Event Sponsorship | 01/01/YEAR | Yes | Yes | |
| UQ Commercial Income | | | | |
| Research Contracts (Commercial) | 01/01/YEAR | No | No | |
| Other Commercial Income | 01/01/YEAR | No | No | |
| UQ Related Organisations Income | | | | |
| Residential Colleges | 01/01/YEAR | No | | |
| Clubs | 01/01/YEAR | No | | |
| Friend Societies | 01/01/YEAR | No | | |
| Not UQ Income | | | | |
| GST | | No | n/a | |
| TUQIA – Currency in transit | | No | Yes | |

OFFICE USE ONLY

Confirmation Finance Reference:

Date Received:

Approved to record Gift Services Manager:

Further Information Required

Date:

Payment Notification:

- Invoice - Advancement Office: Central Advised
- Invoice - Advancement Office: Faculty Advised
- Invoice - Advancement Office: Scholarships & Prizes Advised
- Invoice - Contracts & Grants
- Pledge Reminder: Advancement Office
- Verbal Reminder: Relationship Manager

HERDC:

Actions / Follow up