

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:

Address & Contact Details

Constituent Codes

(Donor must have at least one of Student, Alumni, Staff, Parent, Friend, Organisation, Company, Foundation – Gift Services to apply Donor codes)

Relationships

Proposal has been added / updated

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

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Gift Information

Gift Amount AU\$

Date:

(of donor confirmation)

Anonymous Gift

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													

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