



PSU Gift Policy Application for Exception

Effective July 1, 2009, it is the policy of Portland State University to direct all private gifts to the PSU Foundation. If in a rare and unusual circumstance, the University needs to provide an exception to this policy, the Portland State administrative department or unit requesting the exception will submit a *PSU Gift Policy Application for Exception* to the Vice President for University Relations for approval prior to the acceptance of the gift.

Step 1: Approval of Dean or Vice President to submit application for exception to policy

Dean or VP <i>(Name Printed and Signature)</i>
<hr style="border: 0; border-top: 1px solid black;"/> <i>Printed</i>
<hr style="border: 0; border-top: 1px solid black;"/> <i>Signature</i>

Date

Step 2: Complete this form and send to: Vice President for University Relations
 Mail Code: UR
 Market Center Building #730
 (503.725.4478)

Department	Staff Contact (Name & Title)	Staff Phone	Staff Email

Donor Name and Complete Address	Donor Phone Number	ONE Constituent Database I.D.# <i>(if exists)</i>
	Donor Email	

Type of Gift	Amount of Gift	Designation of Gift (Include proposed account name AND the gift purpose)
<input type="checkbox"/> Check <input type="checkbox"/> Stock <input type="checkbox"/> Pledge <input type="checkbox"/> Gift in kind*		

Reason for requesting exception to policy

**Gifts in kind to be retained for less than three years are gifted to the PSU Foundation.*

**Gifts in kind to be retained for more than three years are gifted to PSU and a gift policy exception is not required.*

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Step 3: Review of Gift Acceptance by Vice President for University Relations or Designee

Gift Policy Exception:

Granted

Denied

Comments: _____

Step 4: Gift Processing

If policy exception is denied, submit check written to Portland State University Foundation along with a *Gift Transmittal Form* and any original paperwork to the PSU Foundation.

The 5 percent gift fee will be deducted from the gift amount at the Foundation.

If policy exception is granted, submit this form with donor's check written to Portland State University to PSU's Business Affairs Office Cashier AND submit a *Report of Gift or Grant* form to the PSU Foundation.

The 5 percent gift fee must be transferred by the receiving unit to PSU Foundation fund #1000001 OR to PSU Index UNR001.