



Policy Number: I.36
Policy Level: Operating Policy
Originally Issued: August 15, 2023
Revised: September 26, 2023
Policy Owner: President
Policy Implementation: VP for University Advancement

Non-Cash Donation/Gift Stewardship and Management

I. Policy Statement and Purpose

Pursuant to the University's *Accepting Gifts or Donations to the University Policy*, the University recognizes a gift as any funds, property, or service voluntarily bestowed upon the University without expectation of return or compensation on the part of the donor.

All gifts/contributions to the University are channeled through the Office of University Advancement for formal acceptance by the President of the University. No gifts or donations will be accepted which are in violation of the University's Non-Discrimination/Equal Opportunity policy or which are prohibited by any federal, state, and local laws and regulations. Gifts or donations which do not support or are otherwise contrary to the University's vision, mission, and goals will not be accepted. All accepted gifts will be acknowledged through the Office of University Advancement.

This policy establishes the criteria for the acceptance/management of non-cash donation/gifts, specifically property, offered to Athens State University.

II. Definitions

For the purposes of this policy, the following definitions are provided.

Non-Cash Gifts – intangible gifts or tangible personal property. The following Non-Cash gifts shall be excluded:

- Gifts which have a cash value or are designated to be converted to cash including but not limited to the following: stock or other securities, mutual fund shares, real estate, retained life estate, oil, gas, and mineral interests, bargain sales, planned gifts, life insurance, charitable gift annuities, charitable remainder trusts, retirement plan beneficiary designations, bequests, or other similar instruments.

University Archives Office – The centralized unit of the University with the task of identifying, collecting, organizing, preserving, and making accessible materials of enduring value that relate to the history, people, mission, and legacy of the University.

University Archivist – the official custodian of records housed in the University Archives. The Archivist is tasked with day-to-day operations of the Archives and identifying, collecting, organizing, preserving, and making accessible materials of enduring value that relate to the history, people, mission, and legacy of the University.



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Enduring Value – the usefulness or significance of material based on the information they contain that justifies the University’s commitment to permanent or ongoing preservation.

Archival Material/Record – material/record with enduring value to the University that relate to the history, people, mission, and legacy of the University. These items serve as evidence of the past activities of the University and chronicle the development of the institution.

Museum and Special Collections – either a single item deemed to have some historical or monetary value or a collection of items held together by provenance or by a thematic focus. Special Collections and museum items may or may not be considered Archival.

III. Gift Stewardship Committee

Any gift presented that may bring into question where the gift should be housed will be referred to the gift stewardship committee. This committee will be convened by the Vice President for University Advancement to determine how/where the gift will reside at the University.

Committee membership will include the Vice President for University Advancement who will serve as Chair of the committee, the University Archivist, the University Records Manager, a University of Advancement Representative, an Academic Affairs Representative, and a Financial Affairs Representative and a Physical Plant Representative.

The Committee will review the gift/donation and make recommendations that include, but are not limited to, where the gift should be physically located unless specified by the donor, minimum requirements for care and upkeep and what area is responsible for upkeep. These recommendations will be reviewed and approved by the President of the University.

IV. Responsibility for this Operating Policy

Policy Owner

As part of the initial approval of this policy the President will serve as the policy owner for the ongoing evaluation, review, and approval of this policy. Subsequent reviews and revisions to this policy must be in accordance with approved operating policy procedures and processes.

This policy will be reviewed every year or more frequently as needed by the Policy Owner. Revisions will be reviewed/affirmed by the Cabinet and approved by the University President. This policy will be updated/published in the University’s Policy Library.

Responsibility for Policy Implementation

The President has assigned the responsibility of implementing this policy to the Vice President for University Advancement.