



## **INSTRUCTIONS FOR THE DONATION APPROVAL FORM**

1. Prior to making a commitment, complete the Donation Approval Form and attach the appropriate support documentation. Obtain the signature of your dean or vice president.
2. Upon completion, forward a scan or paper copy of the request to the President's Office for final approval. You will be notified via e-mail when it is completed.
3. Use the fully approved form as your backup support when requesting payment via A/P Payment Request Form or submitting your receipt on Concur.
4. Proactively request tax receipts from the non-profit organization and forward to the Tax Department for proper reporting.



## DONATION APPROVAL FORM

Sponsorship or Financial Support to Non-Profit or Charitable Organizations

Recipient Organization: \_\_\_\_\_

Date of Event or Request: \_\_\_\_\_

Reason for Request: \_\_\_\_\_

\_\_\_\_\_

SMU Participants: \_\_\_\_\_

\_\_\_\_\_

Cost in U.S. Dollars: \$ \_\_\_\_\_ Charging to PCard: Yes  No

Check one: Sponsorship Only  Monetary Only

Percentage that is tax deductible? \_\_\_\_\_ %

Requesting Dept: \_\_\_\_\_ Org being Charged: \_\_\_\_\_

Name of Requestor: \_\_\_\_\_

Signature of Requestor: \_\_\_\_\_ Date: \_\_\_\_\_

Approval of Dean or VP: \_\_\_\_\_ Date: \_\_\_\_\_

Approval of President: \_\_\_\_\_ Date: \_\_\_\_\_



Attach appropriate documentation to this approval form and forward to the President's Office, Box 100, for consideration prior to event date.



Please obtain and forward a tax receipts to Ann Copeland in the Tax Department, Box 261 or AGCopeland@SMU.edu.

In accordance with SMU Board of Trustees resolution noted below, this form must be completed and approved prior to processing requests for donations from University funds.

*Resolved, that University funds, regardless of their source, shall not be utilized for donations of any kind, including to non-profit or charitable organizations or to other causes. However, on those occasions when, in the opinion of the President, participation by the University in an event will promote the relationship between the University and the community, the President may permit exceptions to this policy. Any exception permitted hereunder by the President shall be in writing and the President shall report annually to the Board the expense associated with permitted exceptions for the preceeding year.*