

NAMED DONATIONS - ROUTING SHEET

AGREEMENT NAME:

1. LDSP DONOR LIAISON/GIFT PLANNING SPECIALIST:

- Gift letter reflects intent of donor(s)
- Gift purpose meets university unit's needs and priorities
- Gift complies with LDSP policies and guidelines
- Letter is in approved form (or exceptions approved)
- Comments are solicited from university units/officers:
 - *Dean or Director*
 - *Responsible Vice President*
 - *Financial Aid & Scholarships*
 - *Regulatory Accounting – Reporting*
 - *Office of the General Counsel*

Name and contact information

2. LEGAL REVIEW:

- Gift restrictions do not unlawfully discriminate
- Process complies with [University Fund Raising Policy](#)
- Changes to form letter (if any) still protect BYU interests

Signature and Date

3. DEAN OR DIRECTOR APPROVAL:

- Gift purpose meets university unit's needs and priorities
- Restrictions on use of gift are practicable over long term
- University unit can fulfill any gift administration duties

Signature and Date

4. VICE PRESIDENT APPROVAL:

- Purpose is consistent with [The Aims of a BYU Education](#)
- Restrictions on use of gift are practicable over long term
- University/unit can fulfill any gift administration duties
- Name reflects university values

Signature and Date

5. PRESIDENT'S COUNCIL:

- No conflict or inconsistency with other university units
- Purpose is consistent with [The Aims of a BYU Education](#)
- Name reflects university values

Date

Additional approvals for specific types of gifts:

6. COMMISSIONER'S OFFICE:

Required for:

- *Plaques erected in university rooms, laboratories, etc.*

Date (if applicable)

7. BOARD OF TRUSTEES:

Required for:

- *Professorships funded at \$300,000 or more*
- *Endowed faculty chairs funded at \$2,500,000 or more*
- *Buildings or major portions of a building*
- *Schools, colleges, centers, institutes, and programs*
- *Other requirements of CES Fundraising Guidelines*

Date (if applicable)

8. AGREEMENT SIGNED (BYU OFFICER):

- All required approvals obtained

BYU Signature and Date

Signed original gift agreements should be sent to the Office of the General Counsel, with copies to (i) the Office of Regulatory Accounting – Reporting and (ii) LDS Philanthropies. A second signed original can be provided to donor if requested through LDSP.