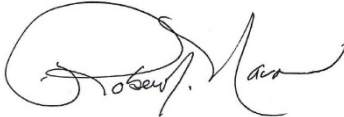


SUBJECT: MATCHING GIFT	Reference: GP-010
Section: GIFT PROCESSING PROCEDURES	PAGE: 1
DEPARTMENT: ADVANCEMENT SERVICES AND OPERATIONS	OF: 2
APPROVED BY: Monica Alejandre, Associate Vice President, Advancement Operations 	EFFECTIVE: 3/1/2020
APPROVED BY: Robert J. Nava, Vice President, University Advancement 	REVISED: 3/1/2020

PURPOSE

The purpose of the Matching Gift Procedure is to establish proper internal controls for the acceptance and receipt of matching gifts and meet the set requirements established by the University.

GUIDELINES

A matching gift is a gift received from a corporation or foundation which matches an eligible gift to the Foundation from an individual employed, retired or volunteering with the corporation or foundation.

- 1) All matching forms provided by the donor must be sent along with the gift, or at the time provided by the donor, to the Foundation.
 - a. Advancement Services will fill out matching gift forms and send it to the matching gift company
- 2) Matching gifts may not be used to fulfill a donor's pledge commitment.
- 3) Matching gifts received from Donor Advised Funds (DAF) will follow the policies set by the DAF on how the gift can be credited to the donor.

PROCESSING

DAF and companies often send checks that require the Gift Processor to retrieve donor information through the matching gift portal setup by the company.

- 1) Matching gifts are processed as normal gifts (*see reference B-3 (g) Gift Entry*)

RECEIPTING

Unless otherwise noted, receipts are sent to the matching gift company. Donors will receive a thank you note referencing the matching gift with no amount listed.