**OFFICE OF UNIVERSITY DEVELOPMENT**

**MATCHING GIFT PROCEDURE**

1. In accordance with the Matching Gift Policy, Development Services, in conjunction with Annual Giving, will work to maximize matching gift revenue. In order to market matching gifts successfully, data maintenance will be required in a number of areas:
   1. Development Services will work to obtain employment records on individuals on the development database. Methods employed to acquire employment information will include, among others, alumni directories, outside search firms, obtaining business cards at events, and fundraising telemarketing. Individuals will then be linked in the alumni database via Relationship to the company for which they work.
   2. Development Services will maintain current matching gift rules on the entities matching gifts, be they corporations or corporate foundations, including such information as match ratios, minimums, maximums, and spousal and retiree matching rules. Corporate foundations will be linked to their associated corporations.
   3. The above two steps will enable Annual Giving to market matching gifts more effectively, proactively in using the potential of matching gifts to encourage donors to contribute to the university, and reactively to remind donors working for matching gift corporations who fail to submit the documentation to certify their gifts to do so.
2. The Development Services Donor Records Specialist designated to be Matching Gift Coordinator will perform the following duties to support the matching gift effort of the university:
   1. When a request for certification of receipt of an individual’s gift is received by the university (on line or by paper), the Matching Gift Coordinator will confirm that the university has received the gift, that it meets the matching gift guidelines of the corporation, and will submit the certification to the matching entity. The Matching Gift Coordinator will then create a matching pledge on the development database for that amount from the corporation.
   2. When matching gifts are received, the Matching Gift Coordinator will pay off the matching pledge in the development database and create a receipt for the gift for the corporation or corporate foundation.
   3. Upon receipt of the matching gift, Annual Giving may send a further acknowledgment to the individual who caused the match to be given, informing him/her of the receipt of the match and again thanking him/her for going to the effort to secure the match.
3. The Development Services Matching Gift Coordinator will also monitor unpaid matching gift pledges to ensure fulfillment, according to the following:
   1. The Matching Gift Coordinator will regularly review unpaid matching pledges to determine whether they are beyond the corporation’s ordinary payment schedule for matching gifts. If this is determined to be the case, the Matching Gift Coordinator will contact the corporation to ascertain if and when payment can be anticipated.
   2. Each year after the close of the fiscal year, the Matching Gift Coordinator will review all matching pledges over a year old to confirm non-collectability. Once this has been confirmed, the Matching Gift Coordinator will request the Associate Director for Development Data Management to execute the pledge write-off utility on the development database, writing off the pledges.