**OFFICE OF UNIVERSITY DEVELOPMENT**

**MATCHING GIFT POLICY**

**Approved by:**

**History:** Issued – March 11, 2011

Revised –

Additional History

**Related Policies:** Development Services Policies; Corporate and Foundation Relations

**Additional References:** HEP Development Matching Gift Information; Gift Processing Procedures

**Responsible Official:** Vice President for University Development, x6911

I. Introduction

The Office of University Development seeks to further the mission of The Catholic University of America through the encouragement, acceptance, and administration of corporate matching gifts. The Office of University Development shall act to identify donors who may be eligible for matching gifts and encourage such donors to apply for corporate matches. The Office of University Development shall then promptly certify the individual donors’ gifts to their employers, process and receipt matching gifts as received, and follow up with corporations from which matches are overdue to ensure maximum support to the university from this revenue source.

II. General Policies

The Development Services office is responsible for maintaining all gift and biographic records for the university’s advancement efforts. There are several ways in which this function contributes to the success of the university’s efforts to maximize matching gift revenue. In order successfully to market the opportunity for donors to have their gifts to the university matched, the university needs information on which employers match their employees’ charitable gifts to the university, and which employees work for such employers. In order to accomplish this, the university needs to maintain current information on the matching policies of individual corporations, as well as obtaining most current employment information on its individual constituents, including alumni, parents, and other friends of the university.

The Annual Giving office can use this information to secure matching gifts in two ways. First, donors can be contacted before they have made a gift, using the leverage of the potential of having their gift matched to encourage them to give to the university. Second, if individuals work for an employer who matches their gifts and they fail to provide the documentation necessary for the university to certify receipt of the gift to their employer, the university can send them a reminder to provide the necessary documentation.

When matching gifts are received by the university from an employer or its corporate foundation, the Development Services office will enter the gift into the development database, paying off the matching pledge created at the time that the individual’s gift was certified to the entity matching the gift. The Development Services office will then produce and mail a receipt for the gift to such employer or corporate foundation. In addition, Annual Giving should mail an acknowledgement letter to the individual whose gift was matched informing the person that the match was received and thanking them for going to the effort of applying for the matching gift.

The Development Services office will regularly review outstanding matching gift pledges to determine if a payment from the entity matching a gift is overdue, based on the matching entity’s rules for matching employee gifts. When a matching gift pledge is found to be overdue, the Development Services office staff member designated as matching gift coordinator who certifies the receipt of matching gifts will follow up by phone or e-mail with the entity to ascertain the status of the payment.

At the close of the university’s fiscal year, the Development Services will contact any matching gift entities for which the development database reflects outstanding matching gift pledges more than a year old. If it becomes apparent that the matching gift entity is not going to make the payment, the matching gift pledge will be written off.