EDINBORO UNIVERSITY OF PENNSYLVANIA

Policy: **GIFTS TO THE UNIVERSITY**

Recommended for Approval by: Tina Mengine, Vice President for University Advancement

Approved by: [Signature] on **8/25/14**

Julie E. Wollman, President

Effective Date

Review Date: August 25, 2015

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**INTENT**

Edinboro University expends operating funds in order to conduct advancement activities, including fund-raising for the benefit of the University’s students. In order to defray those costs, the University will assess an administrative fee on cash gifts received by the University or its affiliates.

**POLICY**

1. As of August 25, 2014, a 5% administrative fee will be collected on all gifts of $100 or more.
   a. This fee applies to all cash and unrestricted gifts.
   b. Non cash gifts (property and real property) will not be subject to the fee.

2. The fee will apply to gifts received after the above date by Edinboro University, Edinboro University Foundation, or Edinboro Alumni Association.

3. Pledges made before the effective date of the policy and subsequent payments on such pledges will not be subject to this fee.

4. Grants will not be subject to the fee.

**PROCEDURE**

1. There will be complete transparency concerning assessment of the gift fee. In particular:
a. All fundraising communications and solicitations (both in writing and orally), all written fundraising materials, and University and affiliate websites will state:

   Edinboro University applies a 5% administrative fee to new monetary gifts of $100 or more. This fee supports the work and efforts of the University to support student success.

b. Gift receipts and stewardship reports will inform the donor that a portion of the gift received has been allocated to cover the cost of fundraising and University advancement.

2. Donors will receive written acknowledgment for the full amount of their gifts.

3. Charitable trusts and bequests will be assessed at the time they are realized.

4. Objections to the Fee will be addressed on a case by case basis.

   a. In cases where the donor (individual, corporate, or foundation) refuses to permit assessment of the fee, a waiver may be permitted at the discretion of the University President or designee.

   b. In cases of donor objection to a gift made to an affiliate (the University Foundation or Alumni Association), a waiver of the fee can only be permitted by action of the Board of the affiliate.

**RELATED POLICIES**

**CONTACT INFORMATION:**

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