

IMPORTANT INFORMATION REGARDING YEAR END GIFTS/MAILINGS AND ONLINE GIFT FORMS:

Year End Mailings

If you or a department you work with is considering a mailing for year end gifts, now is the time for central development review, this process starts with Victoria Wing. Not only does UC Policy prohibit any solicitations going out that have not been approved, but, we can provide helpful input. One aspect of the review is to have Cindy Smith (x2112) in gift administration look at it. If her gift processing staff knows a solicitation is going out and is familiar with the form, the mailing can be assigned an "appeal code" in Advance, so that the results of the mailing can be easily tracked.

Online Gift Forms

Many departments and some development officers have put up online gift forms to assist donors from the web who wish to contribute. It is important that Victoria and Cindy review the forms so that the gifts received can be processed in an efficient manner. For example, we have found that sometimes these forms indicate that gifts should be payable to The Regents when the gift fund is on the Foundation side and vice-versa. Also, these forms cannot be used to make a pledge of more than one year term (you should make a notation that if the donor wishes to do so they should contact a DO directly). If you have launched, or are considering such a form, please forward it to Victoria to initiate review, ASAP. It will benefit you in the long run.

Required Disclaimers

Some of the online gift forms we have seen (but not yet approved) might be seen to imply that the donor could fax a credit card gift. UC Policy specifically prohibits our sending card information by fax or email or recommending it to donors. Therefore, we need to add the following disclaimer to such forms:

The payment card industry strongly advises all cardholders to avoid sending credit card information by fax or email. If you wish to make your gift by credit card, please telephone _____ or mail this form.

Every year, we have a few unhappy donors who mailed in their credit card information but didn't get the deduction they were expecting because it didn't get to gift processing to be charged before the calendar year end. We recommend including the following important information to avoid this unhappy circumstance:

In order to receive a charitable income tax deduction for your 2007 tax return your credit card gift must be charged to your account within the calendar year. Due to university holiday schedules, mailing your card information during the last two weeks of the year may not result in the charge occurring in 2007. To ensure that your 2007 deduction is valid, please mail a check (your gift will be dated by the postmark on the envelope) or telephone _____.

For more information, please contact: Victoria Wing (x5556), victoria.wing@ia.ucsb.edu