
**California State University Maritime Academy
California Maritime Academy Foundation, Inc.**

VOLUME: Policy
NUMBER: FD-02-005

TITLE: Matching Gift Pledges
DIVISION: University Advancement
DEPARTMENT: University Wide

- I. The following steps will apply to the processing of matching gifts.
 - A. University donor gifts are processed as outlined in the Gift Processing Procedure document.
 - B. On receipt of a donor signed company matching gift form, the following will occur:
 1. The university data entry person will check the Raisers Edge data base for entry of the donor's gift and will verify on the company guidelines that the gift is eligible for a match.
 2. Once the original gift has been authenticated, the Vice President of University Advancement (VPUA) will be the only acceptable California State University, Maritime Academy, or California Maritime Academy Foundation (CSUM/CMAF) signature on the matching gift form. The form will be returned to the company to generate the companies match gift.
 3. If the form must be completed on-line, the Director for Advancement Services (DAS) is authorized to submit to the company.
 4. If an original donor gift cannot be found, the DAS will notify the VPUA and follow the next steps.
 - a. Review of the Cal Maritime/CMAF fund accounts to determine if the gift may have been processed in a non-CMAF account.
 - b. In the event no record of a gift is found, the data entry person will contact the donor to discuss the original gift.
 - c. The matching gift company shall be notified and the form returned unsigned if there was no contribution to CMAF.
 - C. A signed hard copy of the corporate matching gift form will remain in the university advancement central files.
 - D. In all cases of matching gifts, the C.A.S.E. matching gift data base will be referred to for individual company policy on matching gift.

HISTORY: MARCH 2012
REVISION: