

## WESTERN OREGON UNIVERSITY DEVELOPMENT FOUNDATION

### ADMINISTRATION FEE POLICY

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*Adopted July 2000; Revised – June 2020, June 2023*

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#### I. **Gift Administration Fee**

##### Purpose

The gift administration fee is a one-time fee applied to all gifts to help sustain development activities in support of Western Oregon University. Beginning July 1, 2000, the gift administration fee will be applied to gifts processed by the WOU Foundation to help offset the operations related to soliciting, processing and stewarding contributions.

The gift administration fee helps to improve the capacity to grow donations for Western Oregon University and helps the foundation effectively offset direct operating expenses related to development operations. Revenue generated by this fee helps provide the necessary resources to reach more WOU alumni, friends and partners to encourage philanthropic support for WOU.

##### Policy

Effective July 1, 2000, all non-endowed gifts to all accounts maintained by the WOU Foundation will be assessed a one-time fee in the amount equal to three percent (3%) of all donations received. The fee will be deposited to the credit of the Fund for WOU to assist in the operations of the foundation.

The gift administration fee applies to all non-endowed cash-type contributions, including credit cards, direct debit donations and gifts made by transfer of stock or securities. To simplify these transactions, the WOU Foundation will absorb any processing fees assessed for online donations processed by the WOU Foundation, as well as any processing fees associated with the transfer of stock or securities.

Exceptions include non-auction related gifts-in-kind (non-cash) that will not or cannot be sold. If the non-cash or real estate asset is sold and the net proceeds benefit WOU, then the gift administration fee will be collected from the net proceeds received from the sale of the item.

The gift administration fee cannot be waived unless there are specific instances where the fee will not apply; for instance, for a grant that has a written policy stating it will not pay administrative fees.

#### II. **Campaign Reinvestment Fee Policy**

In the event that the WOU Foundation Board votes to implement a comprehensive or capital campaign, there will be an additional non-endowed gift administration fee. All qualifying non-endowed donations made to the WOU Foundation in support of a campaign will be assessed an additional one-time fee in the amount equal to two percent (2%) of all donations received. The fee will be deposited to the credit of the Fund for WOU to assist in the operations of the foundation.

This will result in total gift administrative fees in the amount equal to five percent (5%) of all donations received during an active comprehensive or capital campaign.

Exceptions to this additional campaign gift administrative fee include donations made before January 1, 2020, or any donation amount greater than \$2 million on a single gift. For donations larger than \$2 million, the campaign gift administrative fee will only apply to the first \$2 million. The same exceptions for non-campaign administrative gift fees also apply.

### III. **Non-Gift Administration Fee**

#### Purpose

The non-gift administration fee is a one-time fee applied to all non-gift revenue, such as event tickets, merchandise sales and raffle ticket income. The non-gift administration fee will be applied to all non-gift income processed by the WOU Foundation to help offset operations and processing costs, such as those related to creating online credit card payment pages for campus groups. These online pages provide campus groups with the ability to accept payments for non-gift fundraising activities.

#### Policy

Effective July 1, 2020, all non-gift revenue to all accounts maintained by the WOU Foundation will be assessed a one-time fee in the amount equal to three percent (3%) of all non-gift revenue received. The fee will be deposited to the credit of the WOU Foundation Operating Fund to assist in the operations of the foundation.

The non-gift administration fee applies to all cash-type non-gift fundraising payments, including credit card and direct debit payments. To simplify these transactions, the WOU Foundation will absorb any processing fees assessed for online payments processed by the WOU Foundation.

**Credit Card Readers:** The WOU Foundation provides WOU staff credit card readers and tablets for use at university sponsored events. These card readers can be used to accept credit card donations and non-gift payments. Bank Merchant accounts charge a nominal fee, which will be deducted from the total proceeds before depositing into foundation accounts. Donations and non-gift income accepted using the credit card readers will also be charged the gift and non-gift administration fee.