



## MEMORANDUM

DATE: September 5, 2024

TO: All UAA contacts for UA Foundation funds

FROM: Amber Gichard, UA Foundation Senior Director of Fund & Gift Services

RE: Solicitations and Fundraising at UA

The UA Foundation's Fund & Gift Services Team wants to take this opportunity to remind you of the services and resources available to you through the UA Foundation.

**Solicitation and Fundraising:** Before initiating any solicitation or fundraising event, please collaborate with your university Development Office. All solicitations must be reviewed and approved by the UA Foundation due to evolving IRS regulations. For assistance, contact the Fund & Gift Services team at [ua-foundationfundgift@alaska.edu](mailto:ua-foundationfundgift@alaska.edu). This review also applies to reprinted forms and email solicitations by volunteers.

The UA Foundation offers customizable fundraising tools, including online donation forms, crowdfunding, text-to-give, and silent auction software. Consult your Development Office and the Fund & Gift Services team to select the best platform. For events (virtual or in-person), please notify us at least 30 days in advance of requesting any donations, purchases, or sponsorships for approval and paperwork initiation. (To maximize the impact of UA's annual Giving Day (a systemwide fundraiser for UA programs held the last Tuesday-Wednesday of March), coordinate any spring fundraisers with your Development Office.)

**Gift Acceptance:** Per the Board of Regents Policy ([05.14](#)), all donations to the UA system are to be deposited by the UA Foundation. Therefore, donations received on campus or by a university representative must be sent\* to the UA Foundation within one business day. Please ensure:

- Checks are made out to the University of Alaska Foundation (or UA Foundation)
- Fund designations are noted via a cover letter or check memo.
- Accompanying documents, including original envelopes, are included.
- Do not sign or complete any accompanying paperwork. This is handled by the Foundation, as the legal recipient of donations.

*To expedite processing, direct donors to donate online at [engage.alaska.edu/uaa](http://engage.alaska.edu/uaa) or have them mail their donations directly to the Foundation's office: 1815 Bragaw St, Ste 206 Anchorage, AK 99508.*

**Spending from a UA Foundation Fund:** The [UA Foundation Fund Distribution Process](#), simplifies spending by transferring funds directly to universities, eliminating the need for reimbursements or new grant requests. The UA Foundation transfers funds directly to benefiting universities using permanent expense accounts. For details, visit the [FFEA website](#) or contact UA Foundation Director of Fund Stewardship, Nicole Goff, at [nrgoff@alaska.edu](mailto:nrgoff@alaska.edu).

### **Fund Reporting**

Internal UA fund contacts (defined on our [Fund Contacts TESTnet page](#)), receive Quarterly Fund Reports for their assigned Foundation funds. *Please notify Fund & Gift Services of position changes or unit restructuring at [ua-foundationfundgift@alaska.edu](mailto:ua-foundationfundgift@alaska.edu).*

All UA employees can access daily updated fund reports, including fund balances and Fund Agreement Reports (FARs), via Google. To gain access, employees must complete the [Financial Data Confidentiality form](#). This self-service platform does not replace emailed Quarterly Fund Reports.

### **Impact Communication**

For assistance with communicating the impact of philanthropic investments in your area, please contact Nicole Goff, Director of Fund Stewardship, at [nrgoff@alaska.edu](mailto:nrgoff@alaska.edu).

### **Donor Engagement**

As departments plan fundraising events in coordination with the applicable Development Office, please be aware of an important topic – [how to handle invitations to donors](#). We love that programs want to engage donors and invite them to events. But we must ensure their contributions maintain their charitable essence.

If you have questions or need further assistance, please reach out to the Fund & Gift Services team at [ua-foundationfundgift@alaska.edu](mailto:ua-foundationfundgift@alaska.edu). Additionally, if you know of others not on this email who would benefit from this information, please share this with them.

Thank you.

*\*It is preferred that donors mail their donations directly to the UA Foundation for a timelier deposit and receipt. If received in your office, donations should be hand-carried to the UA Foundation's Anchorage office. At UAA, donations may not be transported via inter-campus mail. Our Anchorage office is in a secured building, so please call (907) 786-1111 when you arrive for our staff to meet you at the door.*

*\*\*To access this site, you need to be logged into your UA Google account.*