



CONTRIBUTION ADMINISTRATION FEE POLICY

Approved at the March 20, 2026 Board of Directors Meeting,
superseding the October 18, 2019 approval

PURPOSE

To provide authority for assessment of a fee to defray the administrative costs associated with new charitable contributions to the Cal Poly Humboldt Foundation.

POLICY

The Foundation will assess a fee on charitable contributions in order to defray the costs of accepting, processing, recording, accounting for, and disbursing charitable funds.

- A. The fee will be a percentage of expected contributions with a target rate of 5%. The percentage will be set at the rate estimated to be adequate to defray a significant portion of anticipated costs.
- B. When a donor increases a gift, or makes an additional gift, to cover the Contribution Administration Fee, the amount increased will not be subject to the Contribution Administration Fee.
- C. The percentage will be reviewed annually by the Vice President of University Advancement and the Vice President of Administration & Finance, who will bring a recommendation to the Finance Committee for consideration as a part of the Foundation operating budget.
- D. Philanthropy staff will ensure that the amount and purpose of the fee is readily available to and understood by donors.
- E. Exceptions to the Fee established by this policy may be considered under the following circumstances:
 - 1. When a non-individual donor entity (corporate, foundation, etc.) has a published policy that limits the Fee to a percentage below the amount in this policy.
 - a. If so, the donor entity would submit the written guidelines that detail the maximum donation fee allowed by their entity with a request to the Foundation to have a lower fee applied to their donation.
 - 2. When an individual donor has requested a fee lower than the one established by this policy
 - a. If so, the individual donor would submit a written request to the Foundation for consideration.
 - 3. Any request for a Fee reduction may be approved based on donation level as follows:
 - a. For donations of less than \$1 million dollars can be approved by affirmative vote of both the Foundation Board Chair and Foundation Executive Director.
 - b. For donations \$1 million dollars or more must be brought to the Executive Committee for review and approval.
- F. The Foundation reserves the right to modify this policy at any time.