**Sage Fundraising Online Policy UA PPS No. 01.06**

**Issue No. 1**

**Effective Date: 9/1/10**

**Review: 9/1/EY**

**[Attachment I](http://gato-docs.its.txstate.edu/vp-university-advancement/documents/Sage-Fundraising-Online-Attachment-I/Sage%20Fundraising%20Online%20Attachment%20I.docx)**

1. University Advancement - Sage Fundraising Online

01.01 University Advancement has partnered with Sage Fundraising Online (SFO) to provide a flexible and powerful fundraising tool. This tool will make it possible to enable contextual online giving throughout the Texas State University-San Marcos website. Sage Fundraising Online allows for customization of web forms with flexible giving options which will allow for a quick launch of new events.

01.02 Electronic Payments. The SFO allows donations via credit card and electronic check transactions. Only those credit cards accepted by the university will be utilized on the SFO.

01.03 Security. SFO transactions will be protected via a secured SSL (secure sockets layer) webpage which captures information required to process the donation transaction. Donors’ payment information will be passed to and from on-line processing gateways via a secure SSL connection. Credit card or electronic information will not reside on university-maintained software or hardware.

01.04 Recipient Accounts. All gifts made through the SFO will be credited only to university endowments, designated-fund scholarships, or approved operating accounts.

01.05 Convenience Fee. Donors will not be charged an e-payment convenience fee for the use of their credit card in making donations via the SFO. However, the university account receiving the donation via the SFO will incur a 4.95% fee on the amount received. Fees will be deducted from the donation at time of deposit. Completion of Form will indicate approval of this fee at time of web form completion.

01.06 Credit Card Processing Fees. The cost of credit card processing fees will be charged to the university account that is receiving the donation via the SFO.

01.07 Card Returns and Refunds. Charges disputed by the donor or rejected by the credit card processing vendor will be deducted from the university account that was the recipient of the original donation. The General Accounting Office has the responsibility to enter correcting transactions into the university’s financial system for returns or refunds.

01.08 Donor Data Base. The UA Division has responsibility for data entry and reconciliation of gifts made via the SFO into the donor data base.

01.09 Financial System Entry and Reconciliations. The Cashiers’ Office has responsibility for data entry into the financial system and reconciliation of gifts made via the SFO with the financial system.

01.10 Affiliated Support Organizations. Donors wishing to give to university-affiliated support organizations (such as the Alumni Association, Development Foundation, and others) should contact those organizations directly or visit their respective websites. Refer to [UPPS No. 03.06.01](http://www.txstate.edu/effective/upps/upps-03-06-01.html)

1. Reviews of this PPS

Reviewers of this PPS include the following:

Director of Donor Relations – Senior Reviewer

Assistant Vice President, University Advancement for Development

Vice President for University Advancement

1. Certification Statement

This statement has been approved by the following individuals in their official capacities, and represents Texas State policy and procedure from the date of this document until superseded.

Assistant Vice President, University Advancement for Development

Vice President for University Advancement