



SUGGESTED GUIDELINES FOR U.S. REPRESENTATIVES OF BRITISH COMMONWEALTH INSTITUTIONS

We suggest that the Institution's Representative in the United States should have the following characteristics:

- (1.) a direct affiliation with the Institution, *e.g.*, alumnus/alumna, graduate, benefactor, former teacher or professor.
- (2.) should be willing to give a certain amount of effort to communicating intellectually and physically with their colleagues here, such as by writing, telephoning or arranging social gatherings.
- (3.) should be able to draw on an updated list of addresses provided by the Institution for its alumni/ae in the United States.
- (4.) should collaborate with the Directors of the Foundation to ensure that the Code of the U.S. Internal Revenue Service is observed. For example: "U.S. donors may make gifts to the Foundation and claim a charitable deduction for U.S. Income Tax purposes. They may express a preference for [name of their "old" institution]. Such preferences will be respected by the foundation, but all grants are made at its sole discretion."
- (5.) may have colleagues send their responses to an Appeal directly to the Foundation, or to the U.S. Representative, who will then bundle the checks (drawn to the Foundation) and forward them to our address above.
- (6.) (if the Representative follows the latter approach) should time such Appeals, with sufficient advance notice in the Fall, so that donors who give at the end of a Tax Year will have their gifts cleared before December 31st.
- (7.) may draw upon consultation with the Foundation regarding drafts of Appeal literature, letters, or special gifts (such as donations of securities).
- (8.) are encouraged to become an Associate, Fellow or Life Member of the Foundation and receive its reports and notices.
- (9.) Should anticipate that for successful support of an "old" school, college or other institution, a base of 25 or more alumni/ae in the United States is characteristically needed.

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