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[USD, Foundations' Pact Aids Mexican Donors](#)

Tuesday, July 26, 2011

A unique partnership agreement between the University of San Diego and community foundations on both sides of the U.S.-Mexico border has been reached, effectively allowing Mexican donors to USD to make a financial contribution in a secure and advantageous manner.

Officials from the Tijuana-based Fundación Internacional de la Comunidad (FIC) and its U.S. sister foundation, the International Community Foundation (ICF) in National City, Calif., will aid USD in the transfer of the donation and it will be processed as a tax-deductible gift in Mexico.

"To our knowledge this is the first such cross-border agreement between a U.S. and Mexican community foundation with a U.S. academic institution to enable charitable giving by Mexican donors in the United States," ICF President and CEO Richard Kiy said.

Contributions from Mexican donors have always been accepted by USD, but regulations in Mexico have prevented donations from being a tax-deductible opportunity there, thus resulting in very limited participation with USD.

"Every country has its own rules and regulations, but this allows Mexican donors to contribute to USD and enjoy the same tax advantages they'd get if they were contributing to a Mexican nonprofit," University Relations Vice President Tim O'Malley said.

Yolanda Ingle, USD's Assistant Vice President of International Constituent Relations and Advancement Services; former USD trustee Yolanda Walther-Meade and FIC Director Antonieta Beguerisse Ramos had examined ways to make the process more fluid between Mexico donors and USD dating back four years. The inquiry stemmed from the work of Ingle and Walther-Meade's concerted effort to re-engage USD Mexican alumni with the university.

"It is very rewarding to have reached an agreement between these three entities committed in supporting the educational goals of our students," Ingle said.

Added Walther-Meade: "I feel very happy. To conclude a project that's been in the works for some time, and finish it, is great. I'm sure that once more people know (about the agreement) more people will want to donate to USD."

The FIC found a suitable solution after speaking with government officials and lawyers through rules enforced in the U.S. Patriot Act. Ingle and Ramos praised José Larroque from Baker & McKenzie for his guidance and confirmation of the feasibility of transferring funds between the bi-national foundations.

Here's a closer look at the process: The FIC accepts the donation from the Mexican donor and ensures the legitimacy of the transaction. The FIC then issues the donor a Mexican tax-deductible receipt for 100 percent of the amount and notifies the ICF and USD of the donation. Once the donation is sent to the ICF, minus an FIC administrative fee, the ICF works with USD for approval. Eventually, USD signs a grant agreement with the ICF and the latter receives a small percentage. Officials at USD then provide a confirmation letter with the receipt of funds from ICF and, later, present a final report to both the ICF and FIC. The original donor's name will be recognized in USD donor publications, as will the FIC and ICF.

"I applaud the efforts of Yolanda Ingle and I thank our partners for staying with us through the process," O'Malley said. "I think this is a significant milestone for them in international advancement operations."

Having the agreement strengthens USD's overall relationship with Mexico, whose border is less than 25 miles from campus. All six USD schools, Continuing Education, University Ministry, Community Service-Learning, Alumni Relations and the Trans-Border Institute are among entities on campus that engage with people, organizations and cities in Mexico.

"This agreement signals that we're interested in having Mexican alumni, donors and friends engage with the university at any number of levels, not the least of which is through philanthropy. This is just one more way to cultivate our relationships with prospects and donors in Mexico," O'Malley said.

— **Ryan T. Blystone**

Photo caption (left to right): Antonieta Beguerisse Ramos, Tim O'Malley, Yolanda Walther-Meade, Richard Kiy and Yolanda Ingle. Photo courtesy of Arón Martínez



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