

PPM 206: Appendix II – Acceptance of Cash Gifts

UC ANR Policy and Procedure Manual Section 206 Gifts to UC ANR	
Responsible Officer:	Development Services Director of Advancement
Responsible Office:	Development Services
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I. UC ANR GIFT THANK YOU TEMPLATE

- A. This letter may be used by any recipient of a gift to thank the donor, without officially accepting the gift on behalf of The Regents. All such recipients that receive gifts for the benefit of their own programs are strongly encouraged to issue a personal thank you letter, note, or email to the donor. Any recipient of a gift may issue a thank you letter; no special delegated authority is required. However, the recipient's letter may NOT contain the word "accept" or include any tax language – this will be stated in the subsequent, separate acceptance letter.
- B. Directors that receive gifts for the benefit of their own programs should issue a personal thank you note, letter, or email like this template, but should note the following:
1. If the Director has been redelegated authority to accept a gift up to \$20K, they nonetheless may not accept a gift benefiting their own research project.
 2. Directors may not accept any gift exceeding \$20K.
 3. In situations B1 and B2 above, a separate acceptance letter issued by Development Services is required.

(Template on Following Page)

Thank You/Acknowledgement Template
(Use Appropriate UC ANR Letterhead)

Date

<Name>
<Address>
<City, State, Zip>

Dear <Name>:

Thank you so much for your gift to support the fund/program. (e.g., the Orange County Master Gardener Program). Your gift will allow us provide educational programs for our XXXX# Master Gardener volunteers that will enhance their knowledge of XXXXX and will strengthen their ability to deliver community outreach programs for the citizens of Orange County.

We are grateful for your commitment to the Orange County Master Gardener Program and invite you to enjoy one of our many public programs including XXXXXX on XXXX date/time at location XXXXX. You can also visit our website to learn about additional offerings www.XXXXXX.ucanr.edu.

You will shortly receive your official gift acceptance letter with our tax identification information for your records.

Sincerely,

<Name>
<Title (County, REC or Statewide Program/Institute Director)>
<E-mail>

There should be NO tax language in this simple “thank you” communication.

~~The University of California Agriculture and Natural Resources is pleased to confirm that you received no goods or services for your contribution and that your gift is fully tax deductible. Please retain for your tax records. Our Federal Tax ID# is 94-6036494.~~

Thank you for considering UC ANR in your will or trust.

II. UC ANR CASH GIFT COMBINED THANK YOU AND ACCEPTANCE TEMPLATE

- A. This letter may be used by Directors with written redelegation of authority to thank donors and accept gifts up to \$20K, provided the gift does not benefit the Director's own research project. (Any recipient of a gift may issue a thank you letter; no special delegated authority is required. However, no one may accept a gift benefiting their own research project.)
- B. For gifts in excess of \$20K, or for gifts for a Director's own research project, the Director should issue a thank you letter (see above Thank You Template) and simply note in their gift paperwork that they need Development Services to send the gift acceptance letter.
- C. We encourage offices to provide combined thank you and acceptance letters whenever possible. They save staff time and demonstrate efficiency to donors.

(Template on Following Page)

COMBINED Thank You and Acceptance Template
(Use Appropriate UC ANR Letterhead)

Date

<Name>
<Address>
<City, State, Zip>

Dear <Name>:

Thank you so much for your gift to support the fund/program. (e.g., Farm Smart Program with Desert Research and Extension Center). Your gift will allow us provide hands-on experiences for youth and adults cultivating and harvesting vegetables, creating an understanding of how food gets from the field to market.

This letter is your official gift acceptance and tax receipt for your donation of \$ _____ received on <date>.

We are grateful for your commitment to UC ANR and the program name/location. (e.g., Farm Smart Program with Desert Research and Extension Center).

Sincerely,

<Name>
<Title (County, REC or Statewide Program/Institute Director)>
<E-mail>

Remove this language if this is not the official acceptance letter.

The University of California Agriculture and Natural Resources is pleased to confirm that you received no goods or services for your contribution and that your gift is fully tax-deductible. Please retain for your tax records. Our Federal Tax ID# is 32-0633073.

Thank you for considering UC ANR in your will or trust.