



**UC SAN DIEGO FOUNDATION  
POLICY ON SOLICITATION AND ACCEPTANCE OF GIFTS**

Gifts to the UC San Diego Foundation that do not require a commitment of resources by the Foundation, will be solicited and/or accepted in accordance with University delegations of authority (Exhibit A). Solicitation and/or acceptance of gifts that require a commitment of resources by the Foundation, as well as gifts of real property, planned gifts, fine art and securities, must be reviewed and approved for acceptance in accordance with Foundation policy.

Exhibit A

**DELEGATIONS OF AUTHORITY TO SOLICIT AND ACCEPT GIFTS  
UNIVERSITY OF CALIFORNIA, SAN DIEGO**

Chancellor	Solicit and accept gifts not to exceed \$1,000,000
Vice Chancellor – External & Business Affairs	Solicit and accept gifts not to exceed \$1,000,000
Associate Vice Chancellor – External & Business Affairs, Director of Campus Development	Solicit gifts and accept gifts not to exceed \$500,000
Associate Vice Chancellor – External & Business Affairs, Director of Development, Health Sciences	Solicit gifts and accept gifts not to exceed \$500,000
Assistant Vice Chancellor – External & Business Affairs and Chief Financial Officer	Solicit and accept gifts not to exceed \$250,000
Deputy Director – Advancement Services	Accept gifts not to exceed \$100,000
Gifts Administration Coordinator and Foundation Gift Processor	Accept gifts not to exceed \$25,000

**UNIVERSITY OF CALIFORNIA, SAN DIEGO  
GUIDELINES FOR SOLICITATION, ACCEPTANCE, AND  
ADMINISTRATION OF GIFTS**

**BACKGROUND**

**I. INTRODUCTION**

These Guidelines are presented as a compliment to the Policy on Solicitation and Acceptance of Gifts (Reference F) to provide additional explanation of gift solicitation, acceptance, and administration. University staff are encouraged to contact Administrative & Financial Services or the Development Office for further information.

**II. TYPES OF GIFTS**

The University of California, San Diego, and the UC San Diego Foundation receive gifts from individuals, foundations, and corporations. Responsibility for solicitation and acceptance of gifts rests with the offices of Development and Administrative and Financial Service, University Relations. The most common types of gifts are as follows:

TYPE OF GIFT	DESCRIPTION
CASH	Gifts take the form of currency, coin, checks, money orders, and bank drafts. Special precautions should be taken to safeguard cash.
SECURITIES	This type of gift includes primarily stocks and bonds, but may include promissory notes and life insurance policies.
REAL PROPERTY	Gifts of real property must be solicited in accordance with University of California policies, including the Procedure for Reviewing Gifts of Real Property for Hazardous Substances (Reference L).
INTANGIBLE PROPERTY	Gifts of intangible property include copyrights, patents, contract rights, royalties, etc.
FINE ART	Gifts of fine art must be solicited and accepted in accordance with the stipulations of the Interim Guidelines for Administration of Fine art (Reference K). Note that fine art as defined by the Guidelines includes works of art valued over \$5,000 (the current limit for which IRS requires a qualified appraisal); all other works of art are considered decorative art and are handled as tangible property.

TANGIBLE PROPERTY	Gifts of tangible property include decorative art, computers, laboratory equipment, etc. The Director of Development for the Vice Chancellor area in which the property is to be held should be contacted for handling instructions.
BEQUESTS & DEFERRED GIFTS	Gifts include bequests, testamentary trusts, charitable remainder annuity trusts, charitable remainder unitrusts, pooled income funds, charitable lead trusts, etc., and are referred to the Office of Planned Giving for handling. Planned gifts to the Foundation must be in accordance with the Foundation's Planned Gift Guidelines (Reference M).
OTHER TYPES	Other gifts may include un-reimbursed out-of-pocket expenses incurred in performing service for the University, bargain sales of property, etc. Coordinate all other types of gifts with the Director of Development for the appropriate Vice Chancellor area.

## **GUIDELINES**

### **I. AUTHORITY TO SOLICIT AND ACCEPT GIFTS**

The President may solicit and accept all gifts to the University of California that do not require Regental approval (Reference A) and has delegated this authority to Chancellors (Reference D). The Chancellor of UCSD has re-delegated this authority, and the UC San Diego Foundation has adopted the same re-delegations, to solicit and accept gifts directed to The Regents and the UC San Diego Foundation as outlined in the Policy on Solicitation and Acceptance of Gifts (Reference F).

### **II. GIFT SOLICITATION**

Individuals not expressly authorized by the President of the University of California to solicit gifts must coordinate gift solicitation with the Director of Development assigned to the appropriate Vice Chancellor area.

It is recommended that gift solicitations be coordinated with Administrative & Financial Services for preliminary gift evaluation, including an analysis of economic feasibility and tax and legal requirements.

According to General Counsel, disclosure of the following information should be made in all solicitation materials, on all gift receipts, and on pledge reminders. (Asterisks mark the sections required only for Foundation solicitation.)

1. The UC San Diego Foundation is a California nonprofit, public