

ATTACHMENT A**Initial and Annual Renewal of Recognition Documentation and Recognition Privileges****A. Initial Recognition Documentation**

1. A current list of officers, Board of Directors (if any) and principal contact person for the organization.
2. A statement of the organization's purpose and goals and/or enabling documents (i.e., bylaws, constitution, articles of incorporation or other governing documents).
3. A current roster of names and addresses of donors and members must be provided upon request by the Chancellor (or designee).
4. A statement signed by the officers/representatives of the organization stating that the Board of Directors (or the governing body) has read and formally voted that it will comply with campus and University policies and guidelines.
5. For a tax-exempt organization, a copy of the organization's most recent IRS Form 990 and annual financial statements.
6. A list of the types of activities, including fund-raising and membership drives, the organization intends to undertake and how the organization intends to financially support these activities.
7. A list identifying any accounts with financial institutions, including the institution's name and address, account numbers, and a statement signed by an appropriate officer or representative of the organization authorizing representatives of the University to receive from the financial institution any information, records, or photocopies of transactions relating to the account(s) as the University may at any time request from the financial institution.

Note: Accounts with any financial institution are subject to approval requirements as set forth in the UCLA Support Group Guidelines.

B. Annual Renewal of Recognition Documentation

1. An updated list of officers, Board of Directors (if any) and the principal contact person for the organization.
2. Any changes to the organization's structure, purpose and goals, and/or enabling documents (i.e., bylaws, constitution, articles of incorporation or other governing documents).
3. An updated roster of names and addresses of donors and members must be provided upon request by the Chancellor (or designee).
4. A statement signed by the officers/representatives of the organization stating that the Board of Directors (or the governing body) has read and formally voted that it will continue to comply with campus and University policies and guidelines.
5. For a tax-exempt organization, a statement of revenues, expenses and net income for the last fiscal year and a copy of the organization's annual IRS Form 990 and financial statements.
6. An annual plan of fund-raising, membership drives and other activities for the ensuing fiscal year and how the organization intends to financially support these activities.
7. A list identifying any accounts with financial institutions, including the institution's name and address, account numbers, and a statement signed by an appropriate officer or representative of the organization authorizing representatives of the University to receive

from the financial institution any information, records, or photocopies of transactions relating to the account(s) as the University may at any time request from the financial institution.

Note: Accounts with any financial institution are subject to approval requirements set forth in the UCLA Support Group Guidelines.

C. Privileges That May Be Offered upon Recognition

1. Use of the name of the University of California, UCLA or the name of one of UCLA's schools, departments or units, as part of its own name.
2. Use of UCLA space, equipment, and personnel as may be provided through the sponsoring department for relevant support activities.
3. Mailing labels for event invitations, fund-raising solicitations and newsletters.
4. As appropriate, assistance to identify prospective Support Group members and donors.
5. Liability insurance for approved Support Group activities.
6. Investment of endowed funds through The UCLA Foundation, including participation in its \$220 million pooled endowment fund.
7. Financial administration of gifts through The UCLA Foundation and/or the Regents, including official tax receipts to all donors, gift reports by fund and donor gift credit toward the UCLA Campaign.
8. Annual audit of funds on deposit with The UCLA Foundation.
9. If appropriate, the services of a program director, through the Alumni Association's Council of Support Groups, to advise on Support Group events, programs and fund-raising activities.
10. Assistance from University Communications to publicize Support Group activities through campus publications and the media.