
UCLA Policy 347: Recovery Of Operating Costs From Private Gifts

Issuing Officer: Associate Vice Chancellor, Academic Planning & Budget
Responsible Dept: Academic Planning & Budget
Effective Date: July 30, 2010
Supersedes: UCLA Policy 347, dated 7/1/1998

I. REFERENCES

II. STATEMENT

III. DISCLOSURE OF POLICY TO DONORS

I. REFERENCES

1. Letter to Deans, University Librarian and Others from Chancellor Block and Executive Vice Chancellor & Provost Waugh (Administrative Fee on New Gifts), dated 3/3/2009;
2. UCLA Deans, Directors, Department Chairs and Administrative Officers Memo from Vice Chancellor Olsen (Administrative Fee Calculation for Gifts to Current Operating Funds), dated 6/8/2009.

II. STATEMENT

All gifts to UCLA, except as noted below, are required to provide an amount equivalent to six and one-half percent (6.5%) of the total gift principal for the purpose of partially defraying development and related program costs. This amount will be assessed at the receipt of the cash value of the gift or pledge and set aside in a Development Program Fund subject to allocation by the Chancellor. Gifts pledged prior to the effective date of the implementation of the 6.5% rate (i.e., July 1, 2009) will be charged at the five percent (5.0%) rate.

Gifts Not Subject to This Policy

1. Payments on pledges made prior to July 1, 1982;
2. Non-convertible gifts-in-kind;
3. Private agency grants;
4. Transfers of gift funds from The UCLA Foundation to the University for expenditure purposes which were subject to the Foundation's policy on the recovery of operating costs from private gifts; and
5. Reclassification of gift funds.

III. DISCLOSURE OF POLICY TO DONORS

Disclosure of this policy to donors may be made in a variety of ways through publications and materials of the development program and generally will appear on gift receipts as follows:

The UCLA Foundation and the University of California, Los Angeles apply a one-time administrative fee to all gifts and pledge payments to provide essential support necessary to UCLA's overall operation. The fee is currently 6.5%.

Issuing Officer

/s/ Glyn Davies

**Associate Vice Chancellor, Academic Planning
& Budget**

**Questions concerning this policy or procedure should be referred to
the Responsible Department listed at the top of this document.**
