

## UC Davis Policy and Procedure Manual

### Chapter 260, Gifts and Endowments

#### Section 40, Memorial / Commemorative Gifts and Funds

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Responsible Department: Development and Alumni Relations

Source Document: Development Reference Guide

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#### I. Purpose

This section outlines policy and procedure for establishing memorial/commemorative funds and accepting gifts donated to those funds.

#### II. Definitions

- A. Commemorative gift—a gift given to honor or recognize an individual, group, or event for a particular reason (e.g., birthday, marriage, graduation, retirement, special achievement).
- B. Current use—a fund expended over a short period with immediate impact on the purpose specified by the donor and potentially providing a long-term legacy.
- C. Endowment—a fund derived from a gift or bequest, the terms of which stipulate that the fund principal must remain inviolate in perpetuity and is to be invested for the purpose of producing present and future income that may be expended or added to principal according to the donor's wishes.
- D. Fund functioning as endowment—a fund in which the principal is held inviolate and is invested in the manner of an endowment fund, but the decision to do so may be reversed by appropriate administrative action.
- E. Memorial gift—a gift given to honor or recognize someone who is deceased.

#### III. Policy

- A. The establishment of a memorial/commemorative fund must be reviewed and approved by the Assistant Vice Chancellor—Advancement Services.
- B. Announcements regarding the establishment of a memorial/commemorative fund must be approved in advance by the Assistant Vice Chancellor—Advancement Services.
- C. Commemorative items (e.g., benches, trees, plaques) placed on campus property must be pre-approved by Grounds and Landscape Services before gift funds are accepted for that purpose.
- D. Commemorative items must be coordinated through, provided to, and installed by Grounds and Landscape Services.

#### IV. Types of Memorial Funds

- A. Campus Unit Memorial Funds
  - 1. Colleges, schools, and departments may establish a general-purpose memorial fund (e.g., Animal Science Memorial Fund, College of Engineering Memorial Fund).
    - a. The fund must be the recipient of memorial and commemorative gifts given to the unit.
    - b. The fund may be used to accumulate gifts honoring a particular person(s) which may subsequently, upon qualification, be separately endowed. The newly established memorial endowment fund must be classified as a fund functioning as an endowment.

- c. The dean or department chair is responsible for administration of the fund.
  2. A campus unit memorial fund may be used for purposes determined by the unit, including but not limited to scholarships, awards, prizes, grants in aid, lectureships, official entertainment, or recognition.
- B. Individual Memorial Funds
1. Colleges, schools, and departments may establish an individual memorial fund at their discretion and in compliance with the donor's wishes.
  2. The fund will typically be established as a current-use fund.

## V. Procedures

- A. Proposals to establish a memorial fund functioning as an endowment or as an endowed memorial fund must be submitted to the Assistant Vice Chancellor--Advancement Services for review and approval.

The proposal for the memorial fund must include the following:

1. Fund name.
  2. Purpose of fund.
- B. The following wording may be suggested to individuals or families requesting assistance in preparation of wording for memorial fund notices:
- The family prefers that remembrances and memorial gifts in memory of [name of individuals(s)] be made to the [approved name] Memorial Fund at the University of California, Davis.
- Gifts should be made online at [insert print link to <http://give.ucdavis.edu>] or checks made payable to the UC Davis Foundation (or UC Regents) and sent to UC Davis, Development and Alumni Relations--Advancement Services at the mailing address at [ais.ucdavis.edu](mailto:ais.ucdavis.edu).
- C. The dean, director, or department chair is responsible for the following:
1. Acknowledgment of all memorial or commemorative gifts.
  2. Properly reporting the gift (see [Section 260-25](#)).
  3. Notifying the family of the individual in whose name memorial or commemorative gifts have been made of each donor's name and address. The amount of the gift must not be included in this notice.

## VI. Further Information

- A. For further information regarding memorial funds, call Advancement Services, (530) 754-1106.
- B. Additional information regarding commemorative benches or trees is available from [Grounds and Landscape Services](#), (530) 752-6741.

## VII. References and Related Policies

- A. [Office of the President: Development Reference Guide](#).
- B. [UC Davis Policy and Procedure Manual](#):
1. [Section 260-15, Solicitation and Acceptance of Private Support](#).
  2. [Section 260-25, Gift Processing and Acknowledgement Procedures](#).