

Sample Letter to the Chancellor from a Support Group

To: _____

From: _____

This letter and the attached exhibits constitute the annual report to the Chancellor (*or designee*) for fiscal year 20XX-XX (*or calendar year 20XX*) from the _____ to confirm compliance with the University of California Policy on Support Groups, Campus Foundations and Alumni Associations approved by The Regents on September 15, 1995 (hereafter “the Policy”) and the Administrative Guidelines for Support Groups issued December 18, 2003.

Attached as ***Exhibit 1*** is a current list of the organization’s officers, members of the Board of Directors (or other governing board), and the principal contact person for the organization.

Attached as ***Exhibit 2*** is a statement of the organization’s purpose and goals and/or enabling documents. (*The first year, the filing must contain a complete copy of bylaws, constitution, articles of incorporation and/or other governing documentation. In subsequent years, refer to the first year’s submission BUT attach copies of any changes or revisions to the enabling documents.*)

Attached as ***Exhibit 3*** is a current roster of names and addresses of donors to and members of the organization. (If such records are otherwise maintained by the University, a separate statement verifying that fact should be attached).

Attached as ***Exhibit 4*** is a statement which lists the specific types of activities, including fundraising drives, the organization intends to undertake in the coming year, including the proposed budget for these activities and how the organization intends financially to support these activities.

Attached as ***Exhibit 5*** is a list of all accounts held at any financial institution in the name of the organization, including the institution’s name and address and the account numbers.

Attached as ***Exhibit 6*** is a statement signed by an appropriate officer or representative authorizing the University to obtain upon request from the financial institution all information, records, or photocopies of transactions relating to all account(s) held in the name of the organization. (See Appendix II-B)

For a separately incorporated tax-exempt organization:

Attached as ***Exhibit 7*** is a copy of the organization’s most recent Internal Revenue Service Form 990 and annual financial statements.

The current members of the Board of Directors (or governing body) for the _____ have been provided with a copy of the Policy and Guidelines.

The Board of Directors (or governing body) has formally voted that it will comply with the Policy and Guidelines set forth by The Regents of the University of California and the Office of the President.

The _____ is in full compliance with said Policy and Guidelines and this letter and the attached exhibits contain true and correct information.

The _____ understands that compliance with the University's Policy and Guidelines is a condition of continued acceptance and that any changes to the organization's structure, purpose, and goals and/or enabling documents must be reported in a timely manner to the Chancellor (*or designee*).

Dated this _____ day of _____ 20____.

By: _____

By: _____

Title: _____

Title: _____

Exhibits are to be attached to this letter.

Exhibit 6

*Statement Authorizing
The Regents of the University of California
to Obtain Confidential Bank Account Information*

We, _____ and _____, as _____ (title) and
(title), respectively (the principals), of the _____, authorize agents of The Regents
of the University of California to receive, upon written request, records and photocopies of
confidential bank information from financial institutions for any and all accounts held under the
name of the _____.

By: _____

By: _____

Title: _____

Title: _____