

## **California Educational Research Association (CERA)**

### **Fundraising Disclosures, Individual Solicitations, and Gift Receipt Policies**

CERA uses the following statements as part of its disclosures, solicitations, and gift receipt policies.

#### **1. Tax Deductibility Statements for Use in Solicitations and Acknowledgement Letters:**

*“CERA is a 501(c)3 organization. Your donation is tax deductible to the fullest extent allowed by law.”*

If there was a good or service exchanged as part of the donation, CERA uses the following language with participants:

*“The amount of your contribution that is eligible for federal tax deduction is <your contribution amount> minus \$X, the value of the goods or services received in exchange for this donation.”*

#### **2. Solicitation Letter Checklist**

- Name, address, and phone number of the organization.
- Statement attesting to the tax deductibility of contributions.
- A description of the program for which the organization is seeking support and a general description of the organization’s purpose.
- The letter has been examined to ensure that it does not have inaccurate or misleading information.

#### **3. Donor Gift Receipt Checklist**

- The amount of the contribution that is tax deductible.
- The date the contribution was received.
- Name, address, and phone number of the organization.