



**Gift Acceptance - Policy Utah Historical Society**

**Status: APPROVED**

**Date: April 16, 2026**

**Authority: [Utah Code 9-8-207](#); Utah Historical Society R455-3. Memberships, Sales, Gifts, Bequests, Endowments**

**Purpose:**

This policy addresses the acceptance of financial gifts received by the Utah Historical Society in compliance with [Utah Code 9-8-207](#) and R455-3. The purpose of this policy is to ensure transparency, accountability, and ethical conduct in all fundraising activities undertaken by the organization. By adopting and adhering to this policy, the UHS aims to maintain the highest standards of integrity, accountability, and transparency in all interactions with donors.

**Policy**

**1. Types of Acceptable Gifts:**

The UHS accepts gifts that align with the [UHS mission and values](#). Acceptable gifts may include, but are not limited to:

- Cash donations
- Gifts of stock
- Planned gifts (bequests, life insurance policies, etc.)

**2. Unacceptable Gifts:**

The UHS may decline gifts that in UHS's sole discretion:

- Pose a conflict of interest with the values of the UHS, CCE, or the state of Utah, or with any of other participating parties.
- Carry restrictions that are inconsistent with UHS mission, values, and goals.
- Violate state laws or policy
- Carry potential financial and legal liability.

**3. Gift Review Process:**

Before accepting a gift, the UHS may conduct due diligence to ensure that the donor's intentions align with the UHS values and mission. This may include researching the source of the gift, assessing any potential conflicts of interest, and reviewing the legal and ethical implications of the donation.

The UHS is a division of the Utah Department of Cultural and Community Engagement and must abide by executive directives and current law. Accordingly, the UHS reserves the right to refuse any gift at any time.

**4. Historical Object Donations**

Historical object donations may be made to the UHS collection of historical objects in accordance with the Collection Development Policy and subject to the Acquisition Committee's review. This policy does not apply to Historical object donations.

5. Restrictions:

Any proposed gift that is subject to restrictions pertaining to use may be reviewed to ensure that the proposed restrictions are not in conflict with the mission and administration of the UHS, CCE, or state law or policy. In the event that the restrictions do not align with the mission and administration of the UHS, CCE, or state law or policy, the gift shall be declined unless acceptable gift terms can be agreed upon. If proposed restrictions of use are agreed upon and the gift is accepted, UHS will honor any legally enforceable restrictions placed on gifts.

6. Recognition and Acknowledgement

The UHS is committed to appropriately recognizing and expressing gratitude to donors. Recognition may include public acknowledgment, naming opportunities, or other forms of appreciation, as agreed upon with the donor.

7. Privacy and Confidentiality

The UHS will respect the privacy and confidentiality of donors. A donor's personally identifying information will be kept confidential to the extent permitted by applicable laws and regulations. UHS team members will work with donors to complete the required forms for confidentiality of this information under Utah's public-records law.

8. Pledges and Agreements

For large pledges or multi-year gifts, the UHS and CCE will create a Donor Agreement which stipulates the obligations and restrictions specific to the respective gift. The agreement will be signed by the donor and representatives of the UHS and CCE.

9. Compliance:

All fundraising activities and gift acceptance practices will comply with state law and relevant policies, including but not limited to tax laws, anti-money laundering regulations, and ethical fundraising standards.

10. Foundation

CCE operates a 501c3 charitable foundation for fundraising purposes, with foundation officers designated by CCE Leadership. This foundation is subject to all appropriate laws and regulations.

11. Refunds and Returns

All contributions will be considered final, and refunds will not be issued. Any restricted gift that has been accepted may be returned if compliance with gift restrictions becomes no longer possible.

12. Review and Revision:

This policy will be reviewed regularly or if determined as needed by the UHS to ensure compliance with law, rule, and other state policies. The Utah Attorney General's office also reviews this policy regularly.

13. Governing Law

This policy shall be interpreted in accordance with Utah law. Any conflict between this policy and any applicable state or federal statute or regulation shall be resolved in favor of the statute or regulation.

