



Your Guide to the Philanthropic Foundation: Gift Agreements

August 28, 2020

Agenda



Gift Agreements- Good vs Bad



CPP-Philanthropic Foundation Policies



Agreement templates



DocuSign Process



Questions

CPP- Philanthropic Foundation Facts

- We have **1,357** funds in the Philanthropic Foundation
- **386** are Endowments
- **479** are scholarship accounts
- **483** are program accounts



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Gift Agreements- The Good

- Clear and flexible terms
- Purpose of gift isn't overly restrictive
- Helps create standard practice



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Gift Agreements- The Bad



- No clear restrictions/criteria
- Difficult to administer
- Appointing specific individuals for administration

CPP Philanthropic Foundation Policies

NEW ACCOUNTS: 508 Cal Poly Pomona Philanthropic Foundation

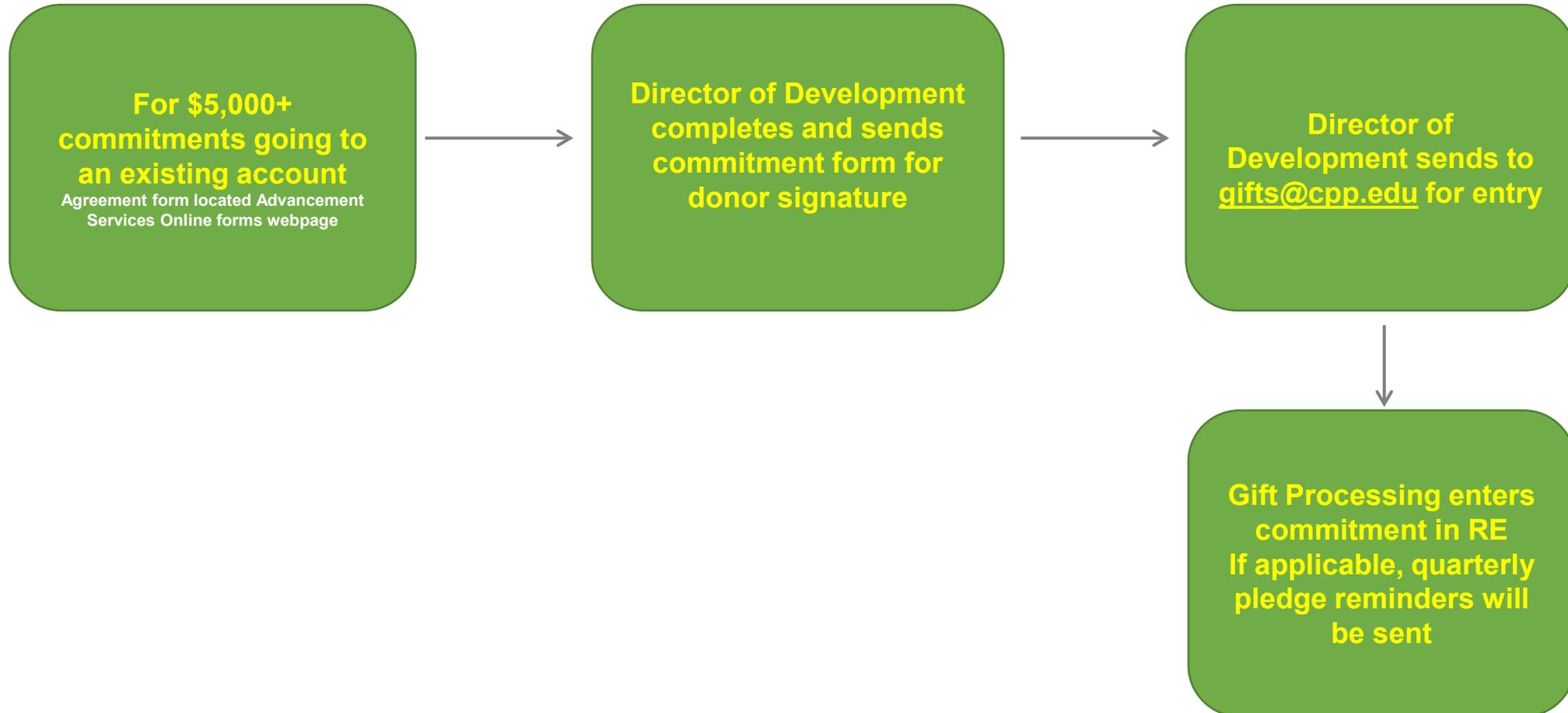
Guideline for Naming & New Projects

A new agreement **FOR YOU TO USE!**

Requirements to use this new agreement:

1. A philanthropic fund already exists! AND...
2. The donor does not want a new fund created
3. The gift is a 5K+
4. Can be used for pledges, outright gifts, recurring gifts, or planned gifts
5. [CPP 5k+ Existing Account Gift Template](#) Form located at [Advancement Services Forms Online](#)

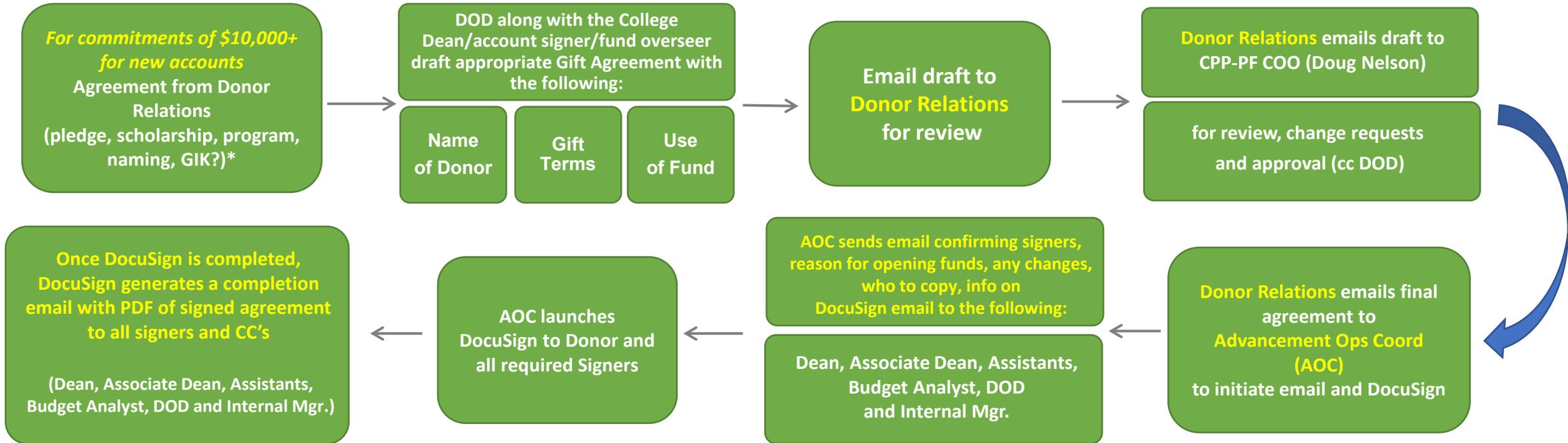
Workflow: Commitments to Existing CPP-PF Accounts



\$10K + Gifts/Pledges to Establish New Accounts

Non-Scholarship No Naming Gift Agreement

DocuSign Flow Chart for Gift/Pledges of \$10K+ (new accounts)



Philanthropic Project Agreements

(New account set-up with no existing agreement)

Used to set up new philanthropic account with no existing donor agreement

- ❖ a bequest
- ❖ a College request to move discretionary funds

Must be approved by CPP Philanthropic Foundation COO

Initiated by Advancement Operations Coordinator follows same DocuSign process as \$10K+ new account set up

[Sample Philanthropic Project Agreement](#)

Summary of all three agreements

CPP \$5k+ Existing Account Gift Template	CPP \$10k+ New Account Gift Template	CPP Philanthropic Project Agreement Template
<ul style="list-style-type: none"> • Existing account • Donor doesn't want to create new fund • Gift is \$5k or more • Template found on Adv Services Forms online 	<ul style="list-style-type: none"> • New account will be created • Takes multiple internal signers via DocuSign to create account • Multiple templates available thru Donor Relations 	<ul style="list-style-type: none"> • Internal form • Use to create a new account when NO gift agreement exists • Multiple internal signers via DocuSign to create account • Used by Gift Processing and AOC



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