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
Gift Agreements - The Good

• Clear and flexible terms
• Purpose of gift isn’t overly restrictive
• Helps create standard practice
Gift Agreements - The Bad

• No clear restrictions/criteria
• Difficult to administer
• Appointing specific individuals for administration
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](https://www.advancementservicesformsonline.com) Form located at [Advancement Services Forms Online](https://www.advancementservicesformsonline.com)
Workflow: Commitments to Existing CPP-PF Accounts

For $5,000+ commitments going to an existing account
Agreement form located Advancement Services Online forms webpage

Director of Development completes and sends commitment form for donor signature

Director of Development sends to gifts@cpp.edu for entry

Gift Processing enters commitment in RE
If applicable, quarterly pledge reminders will be sent
$10K +Gifts/Pledges to Establish New Accounts

Non-Scholarship No Naming Gift Agreement
DocuSign Flow Chart for Gift/Pledges of $10K+ (new accounts)

**For commitments of $10,000+ for new accounts**
Agreement from Donor Relations (pledge, scholarship, program, naming, GIK?)*

**Once DocuSign is completed, DocuSign generates a completion email with PDF of signed agreement to all signers and CC’s**
(Dean, Associate Dean, Assistants, Budget Analyst, DOD and Internal Mgr.)

**AOC launches**
DocuSign to Donor and all required Signers

**DOD along with the College Dean/account signer/fund overseer**
draft appropriate Gift Agreement with the following:
- Name of Donor
- Gift Terms
- Use of Fund

**Email draft to Donor Relations for review**

AOC sends email confirming signers, reason for opening funds, any changes, who to copy, info on DocuSign email to the following:
- Dean, Associate Dean, Assistants, Budget Analyst, DOD and Internal Mgr.

**DONOR RELATIONS emails**
draft to CPP-PF COO (Doug Nelson)
for review, change requests and approval (cc DOD)

**DONOR RELATIONS emails**
final agreement to Advancement Ops Coord (AOC) to initiate email and DocuSign
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

<table>
<thead>
<tr>
<th>CPP $5k+ Existing Account Gift Template</th>
<th>CPP $10k+ New Account Gift Template</th>
<th>CPP Philanthropic Project Agreement Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Existing account</td>
<td>• New account will be created</td>
<td>• Internal form</td>
</tr>
<tr>
<td>• Donor doesn’t want to create new fund</td>
<td>• Takes multiple internal signers via DocuSign to create account</td>
<td>• Use to create a new account when NO gift agreement exists</td>
</tr>
<tr>
<td>• Gift is $5k or more</td>
<td>• Multiple templates available thru Donor Relations</td>
<td>• Multiple internal signers via DocuSign to create account</td>
</tr>
<tr>
<td>• Template found on Adv Services Forms online</td>
<td></td>
<td>• Used by Gift Processing and AOC</td>
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</tbody>
</table>