San Francisco State University
We Make Great Things Happen

Advancement Services Training, Policy & Procedure Updates
Friday, April 24, 2020 - 11:00AM to 12:00PM
Speakers

Thao Vo, Operations Manager, Advancement Operations

Caroline Johansson, Senior Director, Advancement Services
Agenda

• Gift Agreement Templates and Updated Process Document
• Gift-in-Kind Acceptance Form and Deed of Gift for Artwork
• Travel & Hospitality Updates
• New SF State Advancement Vehicle Reservation Policy
• Q & A
Gift Agreement Templates

We have all our gift agreement templates for endowed and current use gifts located on the shared drive here:

Z:\Development\Shared\ADVANCEMENT SERVICES\Gift Agreement Templates
Gift Agreement Process Document

The gift agreement process document is also stored on the shared drive here:
Z:\Development_Shared\ADVANCEMENT SERVICES\Gift Agreement Templates

• Three main steps: Drafting & Editing, Signature, Archiving
• Updates to the process:
  • Amendments
  • DOD’s e-mails the scanned gift agreement to the relevant staff in the administering department or college such as the project director (and the scholarship administrator and/or the business officer, if known)
    • Special Project Agreement (SPA) for spending accounts, Endowment Fund Agreements (EFA) for endowments, and the Scholarship Agreement Form.
Gift-in-Kind Acceptance Form Update

The New Gift-In-Kind Acceptance Form lives on the Advancement Services Forms page.

The updated form includes a reference to the Deed of Gift Form if the Gift-In-Kind is an original artwork.

City of the World Opus 2015 by artist Layla Fanucci (B.A ’81)
New Deed of Gift for Artwork Form

The Deed of Gift Form lives on the Advancement Services Forms page.

- A Deed of Gift Form needs to be filled out and signed by the donor if the gift-in-kind is original artwork being donated by the original artist.
- The Deed of Gift Form transfers title or ownership to all objects or collections to the University free and clear.
- It also allows the University to be free of copyright restrictions.
- It states that the donor is responsible for any appraisals of artwork.
Travel/Hospitality Updates – April 24th, 2020

• Gas mileage reimbursement rate is **57.5 cents** per mile, **effective 1/1/2020**.

• Iowa has been added to the list of banned travel states, **effective 10/4/2019**.
  • Website: [https://oag.ca.gov/ab1887](https://oag.ca.gov/ab1887)

• Direct Deposit Authorization for Employee Reimbursement ([link](#))

• UCorp “Exceptions” Process
  • Exceptions will need to be approved by the appropriate AVP prior to being routed to UCorp for final approval.
New Advancement Vehicle Reservation Policy

The University Advancement Vehicle Reservation Policy lives on the Advancement Services Policy webpage:

• Two vehicles available for Advancement business use
• Please provide at least 48 hours notice or as much advance notice as possible
• Information is required for reservations and should be submitted to the VP Office staff
  • You must have a current Driver Safety certificate on file.
• Fleet user responsibilities
DOCUSIGN FUNDAMENTALS TRAINING

Hosted by the Quality Assurance Team

Thursday, April 30, 2020 2:00PM

Register for the online DocuSign training
NEXT ADVANCEMENT SERVICES TRAINING

SF State Foundation Overview

Friday, May 29, 2020 11:00AM-12:00PM

Zoom or Campus Location TBD
THANK YOU!!!