

Pledge Agreement Form Instructions

Cal Poly Pomona

The Pledge Agreement Form is used to record a pledged gift by a donor and to document the program area to be supported and the terms of the pledge.

A Pledge Agreement Form should be completed immediately after a verbal or written notation of a pledge has been made. Particularly in the case of any initial written correspondence indicating a pledge. The correspondence should be attached to the eventual signed office copy of a completed pledge agreement form with that donor.

It is important to reinforce with a donor that the actual naming of an area or asset, in recognition of a donor's gift, requires a decision-making process that rests either with the campus president or, depending on the size of the gift and intended named recognition, is conferred by the Chancellor or CSU Board of Trustees through official Board action.

Pledge/Donation Agreements (University, Foundation, UET):

- Be careful with pledge agreements, what are the resources and where are they going?
 - Pledges need to be applied to the correct entity.
 - **The UET is the only entity to receive endowments (including endowment pledges).**
 - **Foundation is the recipient of non-endowment, cash pledges.**
 - **The University is the recipient of Gift-In-Kind pledges.**
 - Question the purpose of all gifts of real estate to ensure it is received by the right entity (University or Foundation)
1. At the appropriate time, prepare an initial completed draft.
 2. Run the draft by the appropriate dean, VP, etc., involved in the ask.
 3. Run the draft by the AVP of University Development, Jeff Swanson.
 4. Run this draft by the donor in case the donor wants personal counsel to review document.
 5. Go final on a version to be signed. Make TWO original copies.
 6. Have the donor sign both copies. Have university reps sign both copies.
 7. Send one completely signed copy to donor.
 8. Send other completely signed copy to central advancement for keeping in official files in VPUA office.
 9. University Advancement central staff will send copy to Gifts Processing, Info Systems, CPPF CFO Prenovost, dean/director involved, DOD involved, and others as needed.

Questions concerning the form should be directed to:

AVP of University Development, Jeff Swanson, Jaswanson@csupomona.edu, x2970