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Sent:
To: CALIST@ITSSRV1.UCSF.EDU
Subject: Notification to Campus – Development Office Funding Model
Importance: High

November 15, 2005

**DEANS, DIRECTORS & DEPARTMENT CHAIRS
CAMPUS ADMINISTRATORS**

RE: Implementation of a new Development Office Funding Model

During the past year, UCSF has reviewed the Development Office Funding Model looking for a methodology that was defensible, equitable, and provides the Development Office with the funds necessary for it to carry out its mission. After reviewing of the proposed new Model by campus constituencies, the Executive Budget Committee recommended to the Chancellor that the campus adopt a new funding model **effective July 1, 2005**. This new model will assure that appropriate oversight is exercised over development expenditures as well as providing the flexibility needed to respond to changes in campus fundraising priorities.

The approved FY 05-06 funding model consists of the following components:

1. Gift Fee Assessment at 4% (reduced from 6%);
2. Initiating a Spending Fee at 1% on current gift accounts and endowment income accounts;
3. Assessing Foundation and Regents current, gift and endowment income fund balances STIP earnings at 75% (increased from 25%); and,
4. Foundation trust administration fees at 0.50% and investment administration fees at 0.35%.

The Spending Fee will be implemented as of July 1, 2005 but, due to programming requirements, will be recorded on a year-to-date basis during February or March, 2006. The increased STIP assessment will be recorded on the normal cycle so that the 1st quarter's amounts will be recorded during November or December, 2005.

If you have any questions about these new procedures, please contact Executive Director Michael Irwin in the Development Office at 476-9221.

Bruce W. Spaulding
Vice Chancellor

cc: Chancellor Bishop
Executive Vice Chancellor Washington
Senior Vice Chancellor Barclay
Vice Chancellor and Dean Kessler
Academic Senate Chair Zegans
Executive Budget Committee
Development Faculty User Committee