

**Section 1: Long-term (>5 days) lease of property or equipment**

1. Who is leasing this property or equipment? \_\_\_\_\_
2. How will the property or equipment be used? \_\_\_\_\_
3. Where did the source of funds originate? (check one)  
State ; Grant ; Trust ; Donations ; Other ; Private   
Foundation ; Grant ; Trust ; Donations ; Other ; Private
4. Please explain the source of funds, if necessary. \_\_\_\_\_

**Section 2: Specific Event**

1. What is the date(s) of the event? \_\_\_\_\_
2. What is the event? \_\_\_\_\_
3. What is the purpose of the event? \_\_\_\_\_
4. Where did the source of funds originate? (check one)  
**State:** Grant ; Trust ; Donations ; Other ; Private   
**Foundation:** Grant ; Trust ; Donations ; Other ; Private
5. Please explain the source of funds, if necessary. \_\_\_\_\_
6. Does the event exclusively support a Foundation grant? Yes ; No ;
7. Does the event use Foundation or University facilities?: Please name.  
Foundation;  \_\_\_\_\_ ; University  \_\_\_\_\_ ; Other:  \_\_\_\_\_  
Who is sponsoring the event?  
University  Department  \_\_\_\_\_ Off campus organization  \_\_\_\_\_
8. Who is going to benefit? (check all that apply)  
Participating students  Employees paid by Foundation   
Employees paid by State  Other  \_\_\_\_\_
9. Is the activity going to assist in classroom credit? Yes ; No ;
10. Is there a teaching element that is going to benefit the instructor or student?  
Yes  No
11. Will members of the general public be attending? Yes  No
12. Will CSUF faculty/staff be attending? Yes  No
13. Will CSUF students be attending? Yes  No
14. Are food and/or beverages being served? Yes  No   
If yes, who will be preparing & serving the food or beverage \_\_\_\_\_.
15. Will alcohol be served? Yes  No  Students cannot serve alcohol.
16. Does any part of the event involve the use of automobiles  
(transportation)? Yes  No   
If yes, who will be driving? Student \_\_\_\_\_ Faculty \_\_\_\_\_ Other \_\_\_\_\_
17. Will there be any travel outside of the United States? Yes  No   
If yes complete the following: Where? \_\_\_\_\_  
Date departing U.S. \_\_\_\_\_ Date returning to U.S. \_\_\_\_\_  
Please see: <http://travel.state.gov/> or call 1-888-407-4747 toll free in the U.S.  
for travel warnings or alerts.

Prepared By: \_\_\_\_\_ Phone \_\_\_\_\_ MS# \_\_\_\_\_  
Print Name  
Cost Center/ Obj /Sub # \_\_\_\_\_ Project Director \_\_\_\_\_

## ***Procedures for Requesting Certificates of Insurance For Property or Equipment Leases or Event Agreements***

In general, Project Directors are not authorized to sign on event and lease/ rental agreements on behalf of the University or Foundation. These types of agreements will be signed by either the Foundation's authorized signatory after review by the Foundation's Staff Counsel or by University Procurement/Contracts Officials.

Even though an event or lease agreement is paid from a Foundation trust account, the Foundation will not execute an event contract or lease agreement unless there is a programmatic connection to the Foundation other than simply the fact that the monies that will be used to make payment on the event or lease agreement are located in a trust account with the Foundation. Depending on which entity (University or the Foundation) has the primary programmatic connection with the event or lease, that entity will execute the agreement, as well as cause its insurer to issue any required Certificate of Insurance (COI)

The Certificate of Insurance (COI) Questionnaire will assist in deciding which entity, University or Foundation, represents the primary activity and should have the signing authority of the event or lease agreements and, in turn, who should issue the COI.

### ***Instructions:***

- Submit unsigned agreement to Foundation along with the completed COI Questionnaire a minimum of two weeks prior to an event due date. If a check is required, also attach appropriate completed Foundation payment form.
- Foundation will request both the agreement and COI request to be reviewed and signed and COI issued by the insurance agent through the Foundation or, if determined appropriate, directed to University Procurement.
- If decided Foundation will sign agreements and issue the COI, the signed forms will be routed back to contact person listed on the questionnaire or contact person called for pickup at the Foundation Office.
- If University will sign agreements and issue the COI, the signed forms will be routed back to contact person listed on the questionnaire or contact person called for pickup by University Procurement Department.
- University will forward a copy to the Foundation if there is a request for issuance of a check with the agreement.
- In addition, anytime University or Foundation employees are traveling outside of the United States representing the University or Foundation on sponsored activities, Project Director must report this on the questionnaire. Any cost for additional insurance will be determined. Changing dates of travel requires advance notification to the Foundation. Out of country insurance information cards will be provided.

If you have questions, please contact:

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CSUF Procurement: Margie Phillips 278-2111 [margiep@csufresno.edu](mailto:margiep@csufresno.edu)