Gift Administration

Current as of May 2022

When an incoming gift is expected, it is important to have a process in place to ensure that the gift is processed in a timely and accountable manner. This process broadly involves two steps: first, alerting Gift Services of the incoming gift and then monitoring the gift's progress until it is confirmed to have been received.

Alert Gift Services

1. Department is made aware of an incoming gift. Ideally this information will be accompanied by written documentation of the donor's intent.
   - All gifts must have written documentation stating donor intent. Acceptable examples of documentation include:
     - Gift agreement, signed and routed through EDS
     - Pledge form (both for one-off gifts and gifts paid out over time)
     - Letter from a donor that clearly states how much they are giving to a defined established fund
     - Email correspondence between faculty, fundraiser, or other UW staff and the donor noting gift amount and fund to support

     Note that documentation must come from the donors themselves and contact reports **do not** count. If you do not have adequate documentation, reach out to the donor to secure documentation as soon as possible.
2. Check the donor's Transaction List in [Advance](#) to make sure that the gift has not already been received. If the gift is already listed, you do not need to proceed with the rest of the process.
   - To find the Transaction List, navigate to the donor's entity page, then choose "Giving" from the left sidebar, and finally "Views".
3. Submit a gift alert to Gift Processing via [UA Central Advancement Support](#) (Supportal). To do this, open the [online gift transmittal form](#), fill it out, save it, and then attach it along with the written documentation of donor intent to the support ticket for the expected gift type (see below).
   - [General](#)
   - [Securities / Stocks](#)
   - [Wire Transfer](#)
     - Donor advised funds (DAF) typically come in as wire transfers
       - Not sure? Look at donor's entity record in Advance and see if there is any indication of the payment type from past DAFs

- [Pledges](#)
  - If an initial gift is expected at the same time as submitting a pledge, you may submit them together in one ticket.
  - Suggested format for pledge notification:
    - Subject: Major pledge for [Donor name, Advance ID (AID) / Allocation]
      - Note: If you cannot find the fund in Advance, reach out to your Major Gift Officer as the gift conversation may still be in progress and additional information may be needed in order to appropriately process the gift and gift agreement per the [Gift Acceptance Policy](#).
    - Additional notes: Dear Gift Services… Please book the attached pledge for [Donor name, AID]. They will need reminders one month before the due date. Note this is to start in [Month Year]. Thank you!
  - Attach the signed version of the pledge form.
- Occasionally, a donor will mail a check to the department instead of Gift Services. If this happens, identify the donor, gift type, and allocation based on the check and let the appropriate people in your department know that a check was received. Follow the instructions in step 3 to alert gift services, then print out the gift transmittal form, attach the check with a paperclip (do not staple), and mail it along with the envelope in which the check was received to gift services via [Campus Mail](#).
  - If you do not have documentation of donor intent for the check, mail the check to Gift Services as instructed and then secure documentation and send it to Gift Services as soon thereafter as possible.

Monitor the Gift's Progress

The exact process for monitoring a gift's progress differs from department to department, but there are certain key elements that should be included in all tracking systems. If your department does not yet have an established system, CAS Advancement has found [Trello](#) to be an effective method for tracking gifts.

Recommended gift data to record for tracking purposes:

- Date
- Staff contact name
- Donor name and Advance ID
- Gift amount and allocation
- Gift type (check/stocks/wire, etc.)
- Comments (in case anything unusual or otherwise noteworthy happens)

Recommended stages to monitor to ensure gift is received:

☐ Written documentation of donor intent secured
☐ Transmittal submitted to Gift Services
☐ Gift services confirmed receipt of gift
☐ Gift is showing accurately in Advance
☐ Donor thanked

Proceed with the following steps to monitor the gift's progress. Once all these steps have been completed, the gift is considered resolved and you are done tracking its progress.

1. Check on the ticket in Supportal every day. Once Gift Services receives the gift, they will close the ticket and notify you, thereby confirming the gift's receipt.
2. Check for the gift in the donor's transaction list in Advance every day. Once the gift appears in Advance, make sure that all the gift information is correct; if it is, the gift is considered "booked".
   a. Sometimes a gift will appear in Advance before the ticket is updated in Supportal. If this is the case, the gift is still considered received and booked and you may proceed to step 3.
3. Notify the FLF or other appropriate personnel that the gift has been received.