**STEWARDSHIP  
PROCESS & FOLLOW-UP**

**FOR ADMINISTRATIVE ASSISTANTS**

**Agreements can be found at:** Stewardship\Gift Agreements\Agreement Drafting (note Current Use and Complete folders)

**GIFT BUDGET REQUEST FORM**

1. You may be prompted tosubmit form to GP (*except Jackson School*)  
    - Lianne will provide org/sub org code  
    - cc: Lianne on email request to GP  
    - If not included on response from GP with allocation/budget number, forward Lianne email.

**Submit to warmingt@ (Tara), cc: giftdata@  
subject line = “name of fund” budget request**

**AUDIT ADVANCE & UW GIVING WEB INFO**

1. Verify allocation name (including long name) and description in Advance.  
   **- to request corrections contact giftdata@, cc: warmingt@ and Lianne**
2. Verify name and fund description on UW Make a Gift webpages.  
   - Most information comes from the gift budget request form.   
   - **to request corrections contact** [**advsti@uw.edu**](mailto:advsti@uw.edu)**, cc: Lianne**

**SHORT URL REQUEST FORM**occasional request during agreement drafting  
[**https://www.washington.edu/cms/giving/short-url-request-form/**](https://www.washington.edu/cms/giving/short-url-request-form/)

**ENTER ANNUAL TOP STEWARDEE TASKS AS DIRECTED BY DOA/ADOA**

*This is dependent on your group’s use of the Stewardship Strategy Worksheet*

**BOOK AND SCHEDULE PLEDGES   
  
Interpret gift agreement funding language for pledge details.   
*Check with fundraiser if reminders should be suppressed.***

**2 ways to book a pledge:**

1. Request Pledge Schedule in Advance (no pledge form)  
   - Use fund name in subject line  
   - Attach copy of endowment or current use agreement  
   - In body of message specify all details

Example:  
Can you set up a pledge for Mr. Gregory D. Jacobson #133331?

$667,000 total pledge to YPMEND/ 96-9000 over 3 years:   
$222,334              February 1, 2016  
$222,333              March 31, 2017  
$222,333              March 31, 2018

Let me know if you need anything further,

1. Complete and submit pledge form (can be found on Advancement Intranet)  
   - Usually includes a partial pledge schedule

- In body of message specify all details

Example:  
Can you set up a pledge for Mr. Gregory D. Jacobson #133331?

$667,000 total pledge to YPMEND/ 96-9000 over 3 years:   
$222,334              February 1, 2016  
$222,333              March 31, 2017  
$222,333              March 31, 2018

Let me know if you need anything further,

Follow up in 2-4 days to verify every detail in schedule and pledge is correct

**Submit both methods to lamatin@ (Lorie) and cc: giftdata@ (include matching@, if you know a corp match will be used to pay off this pledge)**

**REQUESTING JV’S OF GIFT TRANSACTIONS**

1. Email your JV request to giftdata@with the following details (you can copy and paste from the Gift Overview in Advance

Example:

Can you please JV the following two transactions into the Roma Boniecka-Anna Cienciala Endowment for Slovene Studies (RBCEND)?

|  |  |  |  |
| --- | --- | --- | --- |
| Primary Donor | [**Ms. Marija Horoszowski #876473**](javascript:if%20(top.lookupResultFrame%20==%20null)%20top.TabHandler.AddTab('Action.aspx?PageId=50002&AppId=5020&idnumber=0000876473');%20else%20top.FinishInPlaceLookup('0000876473');) | |  |
| Date of Record | Aug 15, 2016 | Trans Type | Gift |
| Legal Amt | 1,000.00 |  |  |
| Payment Type | Check (#255230) | | |
|  |  |  |  |
| Receipt # | 6156602 |  |  |
| Allocation | [Friends of Slavic Lang. & Lit.](https://advance.admin.washington.edu/advdb/action.aspx?PageID=50008&AppID=90330&allocationcode=SLADIS) |  |  |

*Please note spouse was given soft credit.*

AND

|  |  |  |  |
| --- | --- | --- | --- |
| Primary Donor | [**Prof. Katie A. Adamson #704810**](javascript:if%20(top.lookupResultFrame%20==%20null)%20top.TabHandler.AddTab('Action.aspx?PageId=50002&AppId=5020&idnumber=0000704810');%20else%20top.FinishInPlaceLookup('0000704810');) | |  |
| Date of Record | Aug 26, 2016 | Trans Type | Gift |
| Legal Amt | 100.00 |  |  |
| Payment Type | Check (#1159) | | |
|  |  |  |  |
| Receipt # | 6166620 |  |  |
| Allocation | [Friends of Slavic Lang. & Lit.](https://advance.admin.washington.edu/advdb/action.aspx?PageID=50008&AppID=90330&allocationcode=SLADIS) |  |  |

**Please DO NOT re-receipt.**

Thanks and let me know if you need anything further.