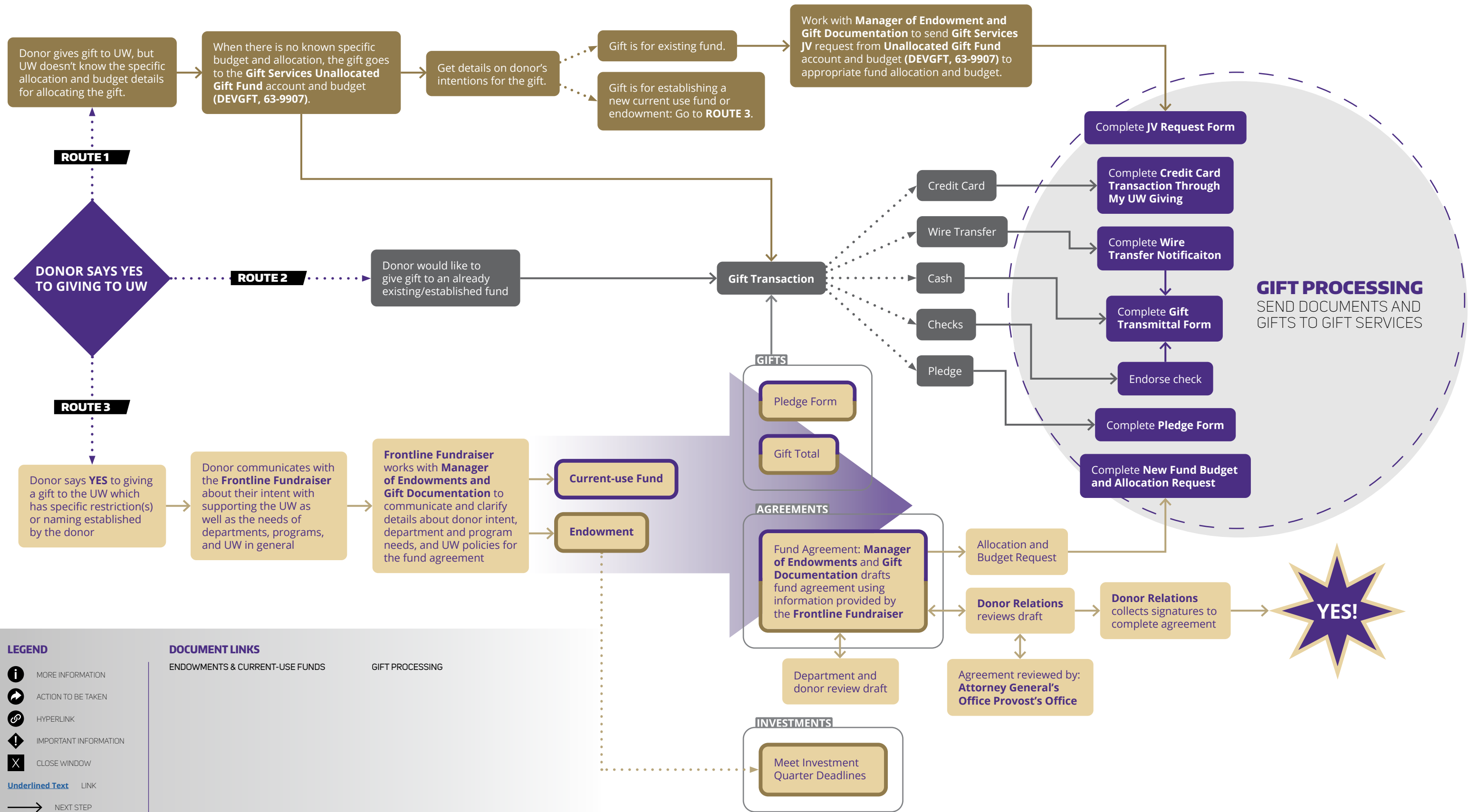
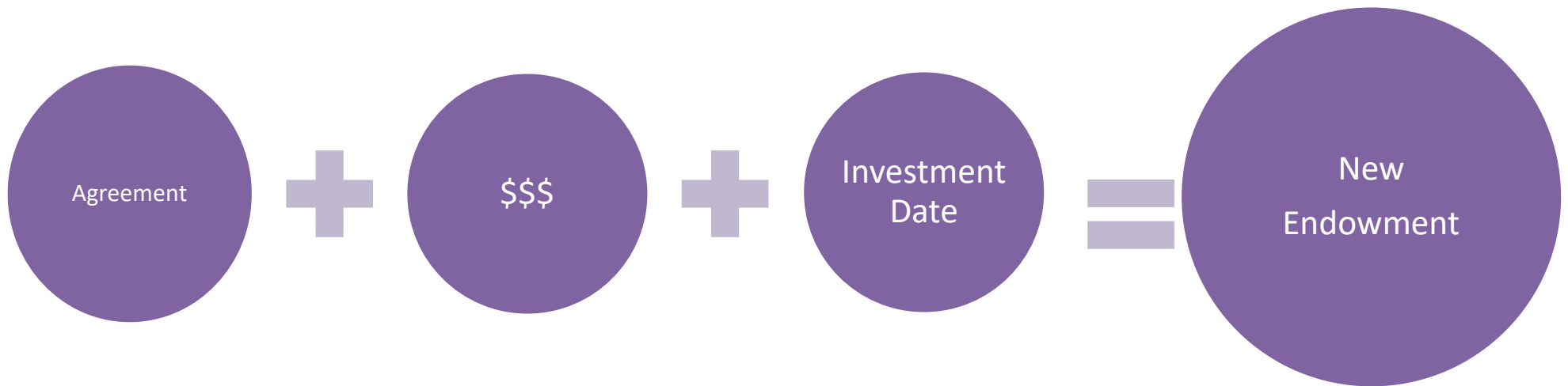


# GIFT PROCESSING FLOW CHART



# Establishing an Endowment: Basic Requirements



**CONTACT INFORMATION**

Questions? Please reach out to [CasAdSer@uw.edu](mailto:CasAdSer@uw.edu)

## Gifts at a Glance

Endowment Distributing Date		
Agreement Finalized & All Monies Received between	Investing Date	Distributing Date
October 2 <sup>nd</sup> → January 1 <sup>st</sup>	January 1	September 30
January 2 <sup>nd</sup> → April 1 <sup>st</sup>	April 1	December 31
April 2 <sup>nd</sup> → July 1 <sup>st</sup>	July 1	March 31
July 2 <sup>nd</sup> → October 1 <sup>st</sup>	October 1	June 30

Endowment Distribution Rate	
Fiscal Year	Distribution Rate
FY 2019	5%
FY 2020	4.9%
FY 2021	4.7%
FY 2022	4.5%

Current Use Gift Assessment Examples	
To Net a Gift of	Give
\$25,000	\$26,316
\$50,000	\$52,632
\$100,000	\$105,263
\$250,000	\$263,158
\$500,000	\$526,316

*(Gift Assessment Chart Formula:  $x = \text{Net} / .95$ )*



# Term & Current-Use Funds

## *What is a Term Fund/Current-Use Fund?*

“Term” funds (also known as current-use funds) are created when a donor agrees to make gifts equal to the payout from an endowment for a specified period of time (“term”). These gifts are not invested in the Consolidated Endowment Fund (CEF), but rather available for immediate use for the purpose specified in the gift agreement. Term funds can be an important source of support for unit/university priorities. These funds are also important vehicles to allow a donor who does not have the resources to establish an endowment now, but might in the future, to “experience” what the impact of an endowed gift might be. Term funds can also encourage a planned giving donor to accelerate their giving in order to see an impact during their lifetimes.

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## What are term fund minimums?

To establish and name a term fund, a donor must commit gifts equal to the distributions of an endowment established at the minimum endowment level. In the case of undergraduate “term” scholarships, recurring gifts must be committed for four years. Other types of funds require a minimum three-year commitment.

- Memorial or Honorary Named Impact Fund - \$5,000 x 5 years
- Program and Student Support – \$10,000/year x 3-5 years
- Graduate Student Support/Faculty Support – \$10,000/year x 3-5 years
- General Scholarship – \$10,000/year x 3-5 years
- Focused Scholarship – \$15,000/year x 3-5 years
- Faculty Fellowship\* - \$25,000 x 3 - 5 years
- Research Acceleration – \$20,000/year x 3 -5 years
- Professorship\* – \$50,000/year x 3 - 5 years
- Chair\* – \$100,000/year x 3 - 5 years

\* Authority and responsibility for the length of a faculty holder’s term is at the discretion of the appointing authority (i.e. Dean or Chancellor).

## CONTACT INFO

Please contact **CAS Advancement Services** at [casadser@uw.edu](mailto:casadser@uw.edu).

Revised July 2026



# CAS GIFT PROCESSING GUIDELINES: FRONTLINE FUNDRAISERS

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*Upon receiving a gift from a donor, please reference the following internal CAS Guidelines for processing gifts:*

1. Fundraiser receives a donation or pledge form.
2. Fundraiser must fill out an internal deposit slip located on top of the safe. These slips convey key gift details, including:
  - Date Received
  - Donor Name and Tandem ID
  - Fund Code (ex- END-123456 or TRM-123456)
  - Any other information the gift processor should be aware of
  - If gift arrives near the end of the year: include the postmarked envelope for tax purposes.
3. Hand the envelope to your Advancement Assistant to process. If your assistant is out of the office, or away from their desk, please give it to another assistant for immediate processing.
4. The Advancement Services team will follow up with the fundraiser who left the check if questions arise during gift processing.

## *To Note:*

- All gifts will be processed within 3 days of being received.
- The Advancement Services team supports the fundraiser is responsible for processing the gift. If the Assistant Director of Endowment & Gift Documentation is out of the office, the Advancement Assistant who is backup is responsible for processing the gift.
- Advancement Assistants will hand deliver any gifts over \$10,000 to Gift Processing at the Tower.
- Advancement Assistants keep copies of the gift transmittal and payment until confirming the gift was processed accurately.

**Please note: gifts received should never be temporarily stored in locked office desks.**



# CAS GIFT PROCESSING GUIDELINES FOR ADVANCEMENT ASSISTANTS

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*Upon receiving a gift from a fundraiser, please reference the following internal CAS Guidelines for gift processing:*

1. Assistant receives a donation or pledge form envelope from fundraiser.
2. Confirm key gift details, provided by fundraiser:
  - Date Received
  - Donor Name and Tandem ID
  - Gift fund code
  - Any other information the gift processor should to be aware of
3. Stamp the back of the check with the endorsement stamp located in the safe.
4. Complete the online [Gift Transmittal Form](#) and print on the Ricoh.
5. Scan the check, any accompanying documentation, and the printed Gift Transmittal Form and send to your email for filing.
6. Paper clip (do not staple) all items and slip into a mailing envelope:
  - Completed gift transmittal form
  - Stamped check
  - Accompanying paperwork or documentation
  - End of year only: postmarked envelope
7. Label mailing envelope as follows:
  - Gift Processing
  - Box 359505
  - Date
8. Deliver gift and paperwork to Gift Processing – Box 359505.
  - This may be done through campus mail or by hand delivery
  - Any gifts over \$10,000 **must** be walked over to the UA UWAA front desk and cannot be sent using campus mail
9. Keep the scanned copies of the gift transmittal and payment in your email. One week from submitting to gift processing, confirm the payment was processed accurately. Delete the gift transmittal information after confirmed.

**Please note: gifts should never be stored in locked desks.**



# CAS GIFT PROCESSING GUIDELINES FOR DEPARTMENTS

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*Upon receiving a gift, please reference the following internal CAS Guidelines for gift processing:*

## Checks or Cash

1. Department admin receives a donation via mail, or personal delivery from faculty or chair.
2. If a check: Use your department's endorsement stamp on the back of the check for secure processing. All checks must be endorsed before sending through campus mail.
  - If your department does not have an endorsement stamp, please submit the [Endorsement Stamp Request Form](#).
3. Verify key details in order to process the gift:
  - Date Received (check date or date cash received)
  - Donor Name and Advance ID
  - Gift budget number, allocation code, or complete fund name
    - i. If your gift requires a new fund, please contact Advancement Services team ([casadser@uw.edu](mailto:casadser@uw.edu)) for assistance.
  - Any other information the gift processor should be aware of
4. Complete a [Gift Transmittal Form](#), either online or utilizing the PDF version, and print.
5. Scan the check, any accompanying documentation, and the printed Gift Transmittal Form and send to your email for filing.
  - If you do not have access to a scanner, make hard copies of all documentation and store in a secure cabinet.
6. Do not use staples to attach checks or cash to supporting documents. Please use paper or binder clips to keep paperwork together.
7. Send all gifts immediately to Gift Services via campus mail to Box 359505 or deliver in person to the front desk of Washington Commons. If sending by campus mail, your envelope should include:
  - Completed Gift Transmittal Form
  - Check(s) and/or cash
  - Accompanying paperwork or documentation
  - Special note: All December-dated checks sent to Gift Services in January must include postmarked envelopes in order to be receipted as 2019 gifts.
8. Address campus mail envelope as follows:
  - Gift Processing
  - Box 359505
  - Date