INSTRUCTIONS FOR COMPLETING
THE NEW PROJECT SET UP FORM

1. Fund Name: Write out the descriptive name of the project.
   
   Use the following guidelines and examples:
   - Do not use “Fund”, “Account” or “Endowment” in the fund name.
   - MAXIMUM 50 characters including spaces in Fund Name
     - Community and Technical College Scholarship
     - Ardell French Memorial
     - Alaska Quaternary
     - U of A Museum
   - Use “and” rather than the ampersand (&) in project names
     - Knapstad, Iver and Cora Scholarship
     - Language and Comparative Literature
   - When a project is named after a donor the donor’s last name should be at the start of the fund name*
     - Hammond, Jay Scholarship
     - Knudson, Kris Memorial
   
   *On NPSUF only. Last name last on GA and AA

2. Accounting Fund Type: Determine the appropriate project type. Select from the list in the drop down menu.

3. RE Fund Type for Reports: Currently used only for UAF funds. Allows KUAC, Garden and Museum to be reported on separately in reports.

4. Start Date: Select the date you want the project to start. This date should be no later than the date of the deposit of the first donation received for the project. Example: October 15, 2007

5. Department: Department is split into two separate types.
   - A: represents accounting and financial reporting purposes, please use list in the drop down menu.
   - D: represents Development, please write in the specific university department.

6. Campus: Select the campus from the list in the drop down menu

7. School/College: Please write in the school or college.

8. Fund Contacts: Signature Authority, Organizational Authority, Administrative Authority, Original Donor required to be filled in. Identifies key positions/individuals related to the fund for both spending and reporting purposes. See Fund Contact Definitions below. Note: Most Fund Contacts are always a position first and an individual second. I.E. a Signature Authority is always a position regardless of what individual holds that position.

9. Purpose: Should match the purpose statement on the GA or AA.

10. Intent to Endow/Approximate Date to Endow: Please note whether or not there is an intention by the donor or university representative that this fund become an Endowment or Quasi-Endowment and the approximate date/time period when that is expected to occur.

11. Scholarship/Award: Please mark if this is a scholarship or award. If scholarship or award, fill out page 2.
FUND CONTACT DEFINITIONS

REQUIRED TO BE FILLED IN ON NPSUF

- Signature
  - Identified as the signature authority on a fund.
  - This type will receive the internal fund/endowment reports

- Organizational
  - Used to identify personnel who are the “head” of a given college/department/etc. This is used to provide copies of fund reports to Deans/Directors/Department Heads who wish to see reports for all funds under their organizational authority regardless of whether or not they themselves are signature authority on the funds.
  - This type will receive the internal fund/endowment reports

- Administrative
  - Used to identify administrative type personnel that Fund Contact Signature types request copies of their fund reports to be sent to (example: a Chancellor asks that his/her Administrative Assistant or Fiscal Tech receive copies of the fund reports for which the Chancellor has signature authority over).
  - This type will receive the internal Fund/Endowment reports

- Original Donor
  - Identified as the original single donor to the fund.
  - This type will receive the external fund/endowment reports

- Original DO
  - Identified as the original Development Officer who worked with the Donor/Fund Originator/University Representative to create the fund.

OTHERS – NOT REQUIRED

- Alternate
  - Identified secondary fund contacts. For example, an original donor has told us that when they die, the contact on the fund should be this person. This gives us a way to identify them without listing them as an original donor.

- Delegated Signature
  - Identifies personnel that the Fund Contact Signature type has delegated signature authority to. We will not add these UNLESS we are TOLD that a person has been identified as a Delegated Signature Authority.
  - This type will receive the internal fund/endowment reports

- Major Donor
  - Identifies major donors for fund/endowment reports. Major donor is yet to be defined.
  - This type will receive the external fund/endowment reports

- Scholarship
  - Used to identify individuals who should receive scholarship thank you letters, invitations to scholarship luncheons etc. Can be a family member of the person for whom a fund is named, does not have to be a donor. Used for stewardship purposes only, not for reporting.

- Significant Interest
  - Identifies a person with a significant interest in a particular fund/endowment. Example: lawyers who are co-successors on a trust. In addition, used a kind of a generic catch all of anyone else that should receive a report if no other type fits.
  - This type will receive the external fund/endowment reports

- Scholarship Recipient
  - Identified as the recipient of a scholarship

- Scholarship Award
  - Reciprocal relationship type for “Scholarship Recipient”