

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* with the last name first. (*Raiser’s Edge will read First Name Last 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”