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II.3 Fund Relationships

This document describes how to setup, view, and use the fund relationships. Note that there are different uses depending on the type of relationship.

Definitions

Types of Fund Relationships:

Fund Contact
- This is used to denote the fund contact for a given organization record (used internally).

Fund Contact – Absentee Delegated Authority
- Denotes delegation of signature authority for a given fund when the primary signature authority is not available.
- No reports are sent to this contact type.

Fund Contact – Administrative
- Administrative contact for a fund.
- User Endowment/Fund Reports will be sent to these people.

Fund Contact – Delegated Signature
- Denotes delegation of signature authority for a given fund.
- User Endowment/Fund Reports will be sent to these people.

Fund Contact – Major Donor
- Denotes a major donor to a given fund.
- Major Giving has not yet been defined

Fund Contact – Organizational
- Identifies funds that a position has organizational authority over. For example, the dean of a given school/college will receive reports on all fund that someone under him/her has signature authority on.

Fund Contact – Original Development Officer
- The original development officer for the fund
- This information is for internal use only and no reports are sent.

Fund Contact – Original Donor
- The original donor to the fund
- Donor Endowment/Fund reports will be sent to this person, if we have a valid address and they are not deceased.

Fund Contact – Scholarship
- This is the contact for scholarship thank you letters, invitations to the scholarship luncheon.
- Used for stewardship only

Fund Contact – Signature Authority
- Signature Authority of the fund
- User Endowment/Fund Reports will be sent to these people.

Fund Contact – Significant Interest
- People that have a significant interest in the fund. IE: A friend of the family, next of kin in the family.
- Donor endowment/fund reports will be sent to this person, if we have a valid address and they are not deceased.

Scholarship Recipient
- Received a scholarship from a given fund
- Reciprocal for Scholarship Award

Scholarship Award
- This is the reciprocal for Scholarship Recipient

Award Recipient
- This is for non-scholarship awards, such as Bullock, Cavin, and Gaven

Setting up Fund Relationships

1. **For Original Donor, Major Donor, Scholarship Recipient, Scholarship, Award Recipients, Original Development Officer, and Significant Interest Fund Relationships**

   These relationships are setup directly to the individual or organizational record. These relationships must be created from the individual (or organizational) record to the fund record.

a. Open the appropriate individual or organization record

b. Select the "Relationships" tab

c. Create a new "Fund" relationship

d. Select the appropriate fund record

e. Select the appropriate type of relationship and reciprocal

   Except for the Scholarship Award/Recipient relationships, all others will be the same relationship and reciprocal

f. Enter the "Date From" if appropriate

   For scholarship recipients, the "Date From" should be the approximate beginning of the term in which the scholarship was awarded. Also, the amount awarded should be entered in the fund relationship notes field. For original donor and original development officer, no date from is entered. Date from is considered the date the fund was created.

g. Save and close the fund relationship

2. For Signature Authority, Organizational Authority, Delegated Signature Authority, Absentee Delegated Authority, and Administrative Fund Relationships

These relationships are setup using an organization record, and individual record, and the appropriate fund records. The linkage is individual to organization to fund. For example, Mary Rutherford's individual Record is linked to the UA Foundation President Organization record, and then the UA Foundation President organization record is linked to all appropriate funds.

a. If necessary, create the organization record, otherwise select the appropriate organization record and skip to step b.

   i. Naming procedure: <campus> Full Title

   ii. Go to "Constituent", "Load Defaults From", select "Internal Record" and click "Ok"

This inserts everything need to keep the record from being mailed or counted during regular reporting

iii. Add the address for the report to go, and if available, the phone number and email address (for future use) for the person

b. Select the relationships tab

c. Create a new “Individual” Relationship

i. Select the appropriate individual

This should be a constituent record, not a non-constituent record. If the individual’s record does not exist, you must create it before this step

ii. Select the appropriate relationship/reciprocal

iii. Enter the date from

iv. Save and close the individual relationship

d. Create a new “Fund” Relationship

i. Select the appropriate fund

ii. Set the relationship/reciprocal to “Fund Contact”

iii. Put the persons department (in short format) in the “Position” field. IE: Chair of the Physics Department, “position” field should be: “Physics Department”

iv. Enter the date from

The date from cannot be before the “Start Date” of the fund.

v. Save and close the fund relationship

e. Save and close the organizational record