

Establishing and Managing Endowed and Restricted Student Awards



Connect with donor
 Establish award terms
 Review terms with faculty
 Review terms with OOR and SGPS
 Review accounting with Finance
 Review compliance with UWO policies
 Review compliance with external programs
 Distribute agreement for signature
 File/Scan final agreement

Submit gift remittal form
 Record new gift or pledge
 Process payment
 Reconcile deposit
 Issue income tax receipt

Review project documentation
 Set up new GL project
 Set up budgets
 Notify Faculty/Department of new project
 Setup new CR designation

Review and approval by SRS
 Approved by SCAPA
 Provided to Senate for info
 Approved by P & F
 Provided to B of G for info
 Set up new award HE item type

