



Steps in Gift Processing and Creating Funds

1. The Office of University Development in the Division of Development and Alumni Affairs receives, records, receipts and acknowledges all gifts on behalf of the University and UNC Charlotte Foundation.
2. The Office of University Development forwards all gifts, on a daily basis, to the Office of Sponsored Programs in the Division of Business Affairs for deposit.
3. The Office of University Development directs the depositing to the appropriate pre-existing account based on donor intent and consultation with the involved College or unit.
4. If creation of a new fund is required, either endowed or non-endowed, the Office of University Development completes the institutional paperwork (new account form, gift agreement, and/or endowment agreement) and submits the paperwork to the Office of Sponsored Programs.
5. The Office of Sponsored Programs establishes and assigns the Foundation account numbers.
6. The Office of Sponsored Programs sends the paperwork to the Endowments and Trust Funds Department in the Division of Business Affairs to establish the University spending accounts.
7. The Office of Sponsored Programs informs all stakeholders (the Office of University Development, the College, the department, etc.) of the new account numbers and any other pertinent information necessary for proper utilization of the funds.
8. The Office of Sponsored Programs transfers funds to the appropriate accounts and also provides each College or unit with a regular report of fund activity as well as fund balances.
9. The Office of University Development coordinates cultivation, solicitation and stewardship contact with donors.