Create Gift Request

This Quick Reference Guide (QRG) is designed to walk Unit Gift Manager through the steps to create a Gift request in Workday. By the end of this QRG, users will be able to successfully populate and submit the Create Custom Gift form to create a Gift request in Workday.

**Procedure: Create Gift Request**

On the Workday Home screen:

1. Enter **Create Custom Gift** in the search field.
2. Select the **Create Custom Gift** task from the Search Results.

On the Welcome to the Gift Hub! screen:

3. Select the **Create Gift** button.

On the Create New Gift screen:

Under the Enter Gift Details section:

4. Complete the following fields:
   - **Gift Type (required)** – select the appropriate Gift Type from the following list:
     - Non-Pooled Classification:
       - True Endowment: Funds received from a Donor with the stipulation that the principal remain intact and be invested in perpetuity to produce income that is to be expended for purposes specified by the Donor.
       - Quasi Endowment: Fund designated to function like an Endowment, but which may be expended at the discretion of the entity's governing board.
       - Term Endowment: Funds where the Donor has indicated that the principal can only be expended after a stated period or upon the occurrence of a specific event.
       - Internal Transfer from Existing Endowment Income: Gift set up to segregate existing Endowment income.
       - Annuity and Life Income: Gift given by a Donor to establish a legal entity (trust) with certain conditions. When the trust terminates, the remaining assets are directed to charitable purposes of the University.
       - Trustee Held Endowments: Endowments held by an outside trustee for the benefit of the University.
       - Capital Building and Equipment Gift: Gift given by a Donor to build or renovate a physical facility or for capital equipment.
     - Spendable Classification:
       - Donor Gift – Restricted: Gift given by a Donor with a restricted purpose(s).
       - Donor Gift – Unrestricted: Gift given by a Donor for unrestricted purpose(s).
       - Foundation Transfer – Endowment Income: Gift set up to receive Foundation held Endowment income.
       - Foundation Transfer – Gift: Gift set up to receive Donor Gifts received at a Foundation.
       - Internal Transfer from Existing Gift: Gift set up to segregate existing Gift funds already received by the University.
       - Internal Transfer – Other: Gift set up to receive other types of Gift funds (i.e., Endowment admin fees).
       - Other: Other types of Gift funds.
       - Agency: Assets held on behalf of an outside entity.
• Gift Name (required) – enter the appropriate Gift Name using the appropriate naming convention for the Gift.
  Prefix-unit defined short name example: TE-AS-DEAN Burger Prof CHEM
  o TE = Workday Gift Type Acronym (True Endowment)
  o AS = MBU Prefix (Arts and Sciences)
  o “DEAN Burger Prof Chem” = The Unit-Defined Short Name

• Gift Alternate Name (required) – enter the appropriate Gift Alternate Name (long name). Use the legal name provided in the Gift Agreement by the Donor if available. Long name example: Burger, Albert Professorship in Biological and Medicinal Chemistry.

• Amount of Funds (required) – enter the amount received or pledged by the Donor.
  o Spendable – amount in hand
  o Endowed – amount pledged

• Check box if Gift will have University Matching (required) – Check box only if matched by the University of Virginia.

• Date Gift Established (required) – this will auto-populate to Today’s Date or use the Donor Documentation to enter the appropriate date of establishment for the Gift.

• Plan of Action for Quasi Endowment (conditional) – If you selected Quasi Endowment as the Gift Type, enter a Plan of Action, and use the “Upload Documents” section to attach required documents.

Under the Enter Gift Purpose and Origin section:

5. Select the (>) icon next to the Enter Gift Purpose and Origin to expand the section.

6. Complete the following fields:
  • Gift Primary Purpose (required) - select the appropriate Gift Primary Purpose from the following list. This information is usually found in the Gift documentation.
    o True Endowment: Funds received from a Donor with the stipulation that the principal remain intact and be invested in perpetuity to produce income that is to be expended for purposes specified by the Donor.
    o Annuity and Life Income: Gift is placed in a trust from which the beneficiary either receives a fixed percentage of the fair market value of its assets or is paid in installments for the rest of his or her life.
    o Capital Projects: A Gift that will be used for construction expenditures or for the acquisition of University property.
    o Fellowship – General: A Gift that awards scholarships to graduate students without Donor restriction.
    o Fellowship – Specific: A Gift that awards scholarships to graduate students with Donor restriction.
    o Hospital: A Gift that supports the patient care operations of the University Medical Center.
    o Journal: A Gift used for journal publications
    o Lecture: A named endowed fund to provide a lecture program for a school, department, or program.
    o Loans: A Gift that creates a student loan program.
    o Operational: A Gift given for operational uses (instruction, administration, libraries, student services, institutional support, etc.).
    o Prize and Premium: A Gift that is given to establish an award or prize fund,
    o Professorship: Endowed chairs established by private Donors.
    o Research: A Gift that supports the general research activities of the University.
    o Research – Restricted: A Gift that supports specific research activities of the University.
    o Scholarship – General: A Gift that awards scholarships to undergraduate students without Donor restriction.
    o Scholarship – Merit Based: A Gift that awards scholarships only to students based on merit.
    o Scholarship – Need Based: A Gift that awards scholarships only to students with a financial need.
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- Scholarship – Specific: A Gift that awards scholarships to undergraduate students with Donor restriction (not need or merit based).
- Student Support: A Gift given for the primary purpose of contributing to the students' wellbeing and overall development.
- Unrestricted – Dean: A Gift given for unrestricted use by the Dean.
- Unrestricted – Department: A Gift given for unrestricted use by the Department.

**Please note there may be other Purposes added on an ad hoc basis that are not defined here**

- Alternate Purpose (optional) – If the Donor has indicated more than one purpose, indicate an Alternate Purpose (see same list of values as Primary Purpose above).
- Default Function (required) – select the appropriate Default Function Worktag.
- Allowed Function (conditional) – select the appropriate Allowed Function Worktag(s). If you are selecting Allowed Functions, the Default Function must also be included.
- Origination (required) – select the appropriate source of Origination.
- Gift Hierarchy (required) – select the appropriate Gift Hierarchy. The drop-down list will only allow you to select from existing Level 1 Hierarchies. If needed, new Gift Hierarchies should be requested prior to submitting this form.
- Check box for Alternate Routing to Cost Center Manager for Approval (conditional) – Check box if the Gift’s approvals should always route to the Cost Center Manager rather than the Unit Gift Manager. If this box is checked, the Gift will be placed in an Alternate Hierarchy after creation.
- Restriction Description (required) – enter a short description of the restrictions attributed to this Gift (i.e., “Gift can or cannot be used for...”).
- Unit Gift Manager (required) – will auto-populate based on the initiator of the task. This can be changed by the initiator by searching on name. The Unit Gift Manager assigned should be the person at the university expected to approve transactions related to this Gift.
- Responsible Org (required) – select the appropriate Cost Center Worktag based on who will be receiving/managing the funds.
- Check box if Gift is SIS Allowed (conditional) – Check box if Gift is expected to be used in SIS.

Under the Accept Terms & Conditions section:

7. Select the (>) icon next to the Accept Terms & Conditions to expand the section.
8. Select the checkbox under the attestation statement to certify that you have read and complied with the University’s Gift Policy.

Under the Upload Documents section:

9. Select the (>) icon next to the Upload Documents to expand the section.
10. Select the Upload button under the Upload Documents section to drag and drop the supporting Donor documentations.

- If Gift is Spendable, upload proof of Gift and donor restrictions.
- If Gift Type is True Endowment (required) – upload fully executed True Endowment Gift Agreement
- If Gift Type is Quasi (required) – upload letter to Augie Maurelli, Associated VP of Financial Operations, and other related documentation.
You are required to attach at least one Donor documentation or related information attachment when submitting the Create Custom Gift form.

Attachments can only be submitted in Word or PDF format, or you will receive an alert. Only one form of documentation can be attached to every “Upload” box in the Create Custom Gift form.

True Endowment Gift Types have their own document upload box.

11. Select OK to submit the request.

If Donor Endowed Funds are held at the Foundation and are SIF matching, initiator must submit two separate “Create Custom Gift” requests:

1. Submit True Endowment Gift request for SIF matching Funds
2. Submit Spendable Gift request needed for Transfer of Foundation income

Once the Gift is routed for approval and created in Workday, the initiator will receive a notification. Details in the notification will allow the initiator to easily search and navigate to their Gift in Workday:

1. Gift ID (can be copy and pasted into the Workday search bar to find the Gift)
2. Gift Name (can be copy and pasted into the Workday search bar to find the Gift)
3. Cost Center
4. Default Fund
5. Allowed Funds (if applicable)
6. Company