

# PROGRESS REPORT

**Working Group Name:** Gift Oversight

**Working Group #:** 29

**Chair:** Andy Acker

**Date:** February 18, 2022

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## **Update on Actions Taken Since Last Report:**

This was our third weekly meeting. Each meeting has lasted one hour. In our first meeting we received guidance from President Banks and discussed challenges. After the first meeting, we restated guidance in written form, articulated the “why” behind our efforts, outlined our problems to solve, primary office responsibilities, and key milestones for implementation. This was all combined into one four-page document titled “summary of thought.”

During the second meeting we reaffirmed our guiding phrase in all discussions and thoughts: the newly formed office will *centralize*, for increased *accountability* purposes, two functions: (1) properly awarding charitable gifts and (2) stewarding gifts. In the second meeting, because we still have so many unknowns, we also agreed not to get mired in detail too early on.

## **Next Major Issue to be Addressed:**

To properly create an implementation plan, we must have a full understanding of awarding and stewardship practices. Our working group needs to study what is being done for each college, department, program, etc. The creation of a Master List/Catalog of Awarding and Stewardship Practices is desired before we create an organizational chart.

As it relates to the future design of an org. chart, we’ve thought through three macro paths/models forward (1 - full centralization, 2- hybrid, or 3- decentralized/current) for the new office of gift oversight. Many in our working group prefer the hybrid org. chart approach with dotted line reports. Below is a quote from a working group member:

“A well thought out and executed hybrid will yield the stewardship and review of endowments, plus allow for updates on processes to occur more organically within each unit/college/department. A hybrid (model) may go further than centralization since it would keep the historical knowledge/ familiarity with the awards within a department by specialized staff (especially when it comes to Professorships).”

## **Problems or Barriers Encountered and Solutions Identified:**

The current challenge, before an organizational chart is created, is that we do not possess a Master List/Catalog of Awarding and Stewardship Practices. We do not know the faculty and staff currently involved in awarding and stewarding gifts. Once we have this, we will be able to better create an organizational chart.

**Deliverables Completed:**

A “summary of thought” document was created to confirm our guidance, articulate the “why” behind our efforts, outline problems to solve, primary office responsibilities, and key milestones for implementation.

**Timeline for Completion of Remaining Deliverables:**

Our timeline is fluid, but we’ve created the following key milestones and delivery dates:

1. Define primary responsibilities of the office and create a job description for the leader of the new office of gift oversight by March 1.
2. Determine how many need to be hired; create an organization chart by March 11.
3. Identify all individuals impacted with the formation of this new office. Seek their feedback and input by April 15.
4. Finalize implementation and communication plans on May 6.
5. Communicate to those affected by changes by June 1.
6. Post job description by June 8.
7. Leader of the new office starts by August 1.