

PROGRESS REPORT

Working Group Name: Gift Oversight

Working Group #: 29

Chair: Andy Acker

Date: February 25, 2022

Update on Actions Taken Since Last Report:

During this meeting, we came to a consensus that the “centralization” for the Office of Gift Oversight (working title) is *not about people*, but more about the *centralization of accountability and processes*.

We believe that the Office of Gift Oversight should serve as an oversight hub for (1) fiduciary spending - properly awarding charitable gifts and (2) stewarding gifts.

Further, we also have a consensus that keeping scholarship administrators and other professionals, that currently manage fiduciary spending - properly awarding charitable gifts and the stewarding gifts, in their current units has benefits. One of our working group members predicts that keeping professionals in their college/department/unit/program, “would keep the historical knowledge/ familiarity with the awards within a department by specialized staff (especially when it comes to Professorships).”

Next Major Issue to be Addressed:

A position inventory (who’s doing what/ how much) needs to be completed for units/departments/college-level to locate staff who are providing a business function for scholarships, endowments, professorships, etc. This should be done before our working group creates an org. chart, since the staff will drive the flow of processes.

Problems or Barriers Encountered and Solutions Identified:

To create an inventory of people, we will break into scholarships, faculty, and programmatic/other subgroups before our next meeting.

Previously, our working group discussed what the organizational chart may look like. Our working group thought through three organizational models (1 - full centralization, 2- hybrid, or 3- decentralized/current) for the new office of gift oversight. After discussion in and out of meetings, we decided that that the “centralization” for the Office of Gift Oversight (working title) is not about people, but more about the centralization of accountability and processes.

Deliverables Completed:

None since the last report.

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.