Establishing and Managing Endowed and Restricted Student Awards

**Award Development**

- Project Set up
- Gift Processing
- Award Approval
- Award Recipient Selection
- Ongoing Management
- Stewardship
- Reports & Audit
- Project Closure

**Award Administration**

- Project Set up
- Gift Processing
- Award Approval
- Award Recipient Selection
- Ongoing Management
- Stewardship
- Reports & Audit
- Project Closure

- 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

- Advertise award
- Review application forms
- Review OSAP applications
- Provide faculties with award list
- Choose award recipient
- Apply award to tuition account or
- Requisition cheque
- Issue T4A to student

- Request recipient report
- Run and review donor report
- Write donor thank you
- Review donor strategy

- Allocate investment returns
- Calculate amount for spending
- Create journal entries
- Send pledge reminders
- Monitor award compliance
- Allocate matching funds
- Monitor spending
- Evaluate award value and #
- Submit revisions to SRS

- 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

- Allocate matching funds
- Monitor spending
- Evaluate award value and #
- Submit revisions to SRS

- Calculate amount for spending
- Create journal entries
- Send pledge reminders
- Monitor award compliance
- Allocate matching funds
- Monitor spending
- Evaluate award value and #
- Submit revisions to SRS

- Create financial statements
- Create faculty reports
- Submit external reports
- Audit by external auditors

**Acronyms**

B of G – Board of Governors  
CR – Contributor Relations  
SCAPA – Senate Committee on Academic Policy and Awards  
GL – General Ledger  
HE – Higher Education  
OOR – Office of the Registrar  
P & F – Property & Finance  
SGPS – School of Graduate & Postdoctoral Studies  
SRS – Subcommittee to Review Scholarships