**Instructions / Field Descriptions**

* **Additional Contact Name**: The person that should be contacted for any project related questions.
* **Project Name**: A name that describes the purpose of the donation as specified by the donor. This information can normally be found in the Gift Agreement or other document provided by the donor (i.e. letter, note, memo, e-mail or solicitation document). If an endowment is to be created, please ensure the name states “endowment.”

* **Project Type**: Choose from the dropdown the type of project you are creating.

**Admin** **Reserve**: Administrative Reserve **Annual Fund:** Annual Fund/Capital Campaign

**Building:** Building Fund **Chair:** To fund a Chair

**Development:** To provide funds for faculty development, support and recognition.

**Discretionary:** Discretionary Funds **Fellowships:** To fund Fellowships

**General Reserve:** To fund General Reserve **Investment:** Foundation Investments

**Professorship Faculty:** Professorship Funds **Research:** To fund research projects

**Sponsored Research:** This project type is to be used solely for projects managed by ORED.

**Programs:** To provide funds for the benefit of programs in a school or department.

**Scholarship:** To fund Scholarships **Student Support:** Student Support

**First Gen Scholarships:** To fund First Generation Scholarship projects.

* **Department Org Number**: is a nine-digit number that identifies an organizational department receiving the donated funds. (i.e. College of Engineering and Computing, Biomedical Department)
* **Fund Administrator**: The Fund Administrator must be an FIU employee who is knowledgeable of the specific activities of the project. Responsibilities of the Fund Administrator include compliance with the Project’s Purpose/Use of Funds and management of expenses before they are approved by the Expense Managers/Org Approvers.
* **Project End Date:** If applicable; the anticipated end date of the project.
* **Initial Deposit and Foundation JE #:** The initial cash payment amount received and corresponding Foundation Journal Entry # if known.
* **Source of Deposit:** (i.e. cash, check, credit card, etc.).
* **University Activity Number:** This only applies to ‘Scholarship’ or ‘First Generation Scholarship’ project types. Provide the University Activity number from where the scholarship will be disbursed to the student. (Note: Only Activity Numbers in Fund 471 & 472 can be selected. If you have any questions, please contact Casey Pastor with the Office of Scholarships at Ext. 4988)
* **ORED # / AWD #:** This only applies to Sponsored Research projects. If your project is a Sponsored Research project and you don’t know the ORED Project # or AWD # please contact preaward@fiu.edu for further assistance.
* **Donor(s) / Other Donor(s)**: The name of the donor(s). This may not necessarily be the check payer if payment is made on behalf of someone else.
* **Purpose of Project / Use of Funds**: Include a statement of what the donated funds are to be used for. Please include specifics as to what types of expenses are allowed. This information can normally be found in the Gift Agreement, or other document provided by the donor which explains the donor’s intent for the use of the funds.
* **Donor Restrictions/Criteria**: Include a statement of specific types of expenses (if any) the donor does not want the funds to be used for. Include a statement of specific criteria (if any) that must be met for the donated funds to be used.
* **Reporting Requirements**: Please respond if the gift has interim reports and /or Final reports and if so, provide the dates for them (multiple Interim dates can be selected).

**Supporting Documentation / Attachments:**

The following supporting documentation must be attached to the submitted forms:

1. Gift Agreement and/or any other document that substantiates the donor’s intent for use of the funds.

If no Gift Agreement is available, provide a copy of the pledge agreement, written letter/note from the donor, or copy of check with memo line information.

In the case of a grant where a proposal is required by the grantor/donor, include a copy of the written proposal and approved budget.

For “In Memoriam” projects, provide a copy of the obituary or other formal announcement.

1. Copy of the deposit transmittal documenting the initial deposit amount.