Arts and Architecture Endowments/Annually-Funded Awards Calendar
(Calendar Year 2012)

January/February
Stewardship Coordinator reviews any un-disbursed scholarships for re-award if student eligibility has changed or if donors made additional gift(s) to the endowment. Findings are reported to departments/schools.

Department/School Action Items:
• Review scholarship monies not spent for Spring 2012, re-award.
• Utilize any remaining available spending for the current 2011-12 fiscal year.

March
Stewardship Coordinator meets with departments/schools to discuss various stewardship efforts including: review/discuss any remaining available spending for 2011-12; review/discuss their estimated spending amounts for 2012-13.

Department/School Action Items:
• Utilize any remaining available spending for the current 2011-12 fiscal year.
• Begin award process for 2012-13. Awarding students by early June increases the likelihood of impacting recruitment, retention, and assistance to families planning semester bill payments.

April
Stewardship Coordinator works with departments/schools to finish awarding scholarships for 2011-12. Deep involvement in budgeting and awarding from the endowments for 2012-13 – Stewardship Coordinator monitors spending, reviews incoming Scholarship Award Forms for accuracy, and submits forms promptly to the College’s Undergraduate Studies Office for processing. Regarding Trustee Scholarship, Linda Wheeland in the College’s Undergraduate Studies Office will send unit heads via email their respective lists of eligible students. Note the May deadlines listed below.

Department/School Action Items:
• Utilize any remaining available spending for the current 2011-12 fiscal year.
• Continue awarding for 2012-13. Note upcoming May deadlines, item (1) below.

May
Stewardship Coordinator continues deep involvement in budgeting and awarding from the endowments for 2012-13 – monitor spending, review incoming Scholarship Award Forms for accuracy, and submit promptly to the College’s Undergraduate Studies Office for processing.

In mid-May, Stewardship Coordinator prompts departments/schools to review their 2011-12 spending account balances via eSteward and, if guidelines allow, determine whether to retain any unspent income or revert it to principal; Stewardship Coordinator announces June 8 as deadline for reporting changes.

Department/School Action Items:
(1) Continue awarding for 2012-13...
• **Between April 30-May 7:** Units should immediately review the list(s) of eligible trustee scholarship recipients provided by Linda Wheeland, and inform Linda of students they wish to select for Trustee Scholarships no later than May 7. Trustee Scholarship thank you’s and Release of Information Forms should be submitted to the Stewardship Coordinator by May 28.

• **June 4:** 2012-13 Scholarship Awards Forms are due to Stewardship Coordinator (Development Office) by this date in order for them to be processed and submitted to Student Aid by mid June. Important Note: Thank-you letters and Release of Information Forms do not need to accompany Scholarship Award Forms – they do, however, need to be sent to the Stewardship Coordinator as soon as they are received as the award will not be released until the recipient follows through on their expected responsibility.

(2) Review 2011-12 spending account balances. If monies will not be spent by close of fiscal year, determine if account balance should be either retained in income or reverted to principal. – notify Stewardship Coordinator (Development Office) of changes by June 8.

**June**
Stewardship Coordinator reports retain/revert changes to central side in mid-June. Ensure that all student awards for the current 2011-12 year are disbursed to students’ accounts by June 13. Awards disbursed after June 13 will be reported on the following fiscal year endowment reports and we will need to explain to donors why monies were not spent.

**Department/School Action Items:**
- **By June 8:** review 2011-12 spending account balances; if monies will not be spent by close of fiscal year, determine if account balance should be either retained in income or reverted to principal. Report changes to Stewardship Coordinator (Development Office) by this date.
- Cover 2011-12 scholarship awards.
- Continue budgeting and awarding from the endowments for 2012-13.

**July**
Stewardship Coordinator continues monitoring endowment expenditures

**Department/School Action Item:** Continue budgeting and awarding from the endowments for 2012-13.

**August**
Stewardship Coordinator meets with departments/schools to discuss various stewardship efforts.
With input from units, Stewardship Coordinator must provide letters of rationale to donors justifying monies not spent (in tandem with annual endowment reports).

**Department/School Action Items:**
- Provide insight on unspent funds to incorporate into letters; provide copies of press releases or other announcements relating to the work of student beneficiaries or relating to the donors’ area of interest to include with the mailing.
- Continue budgeting and awarding from the endowments for 2012-13.

**September**
At the end of drop/add (early Sept.), Stewardship Coordinator reviews any un-disbursed scholarships for re-award if student eligibility has changed or if donors made additional gift(s) to the endowment.
Stewardship Coordinator reports findings to departments/schools.

**Department/School Action Item:** Review scholarship monies not spent for Fall 2012, re-award.
October
Annual endowment reports mailed to donors.
*Department/School Action Item:*
  - Work with Development Office to respond to questions and concerns of donors following endowment stewardship mailing.

November
Stewardship Coordinator meets with departments/schools to discuss various stewardship efforts.

December
Stewardship Coordinator prompts units to review unspent funds (via eSteward)
*Department/School Action Item:*
  - Review 2012-13 remaining account balances (via eSteward); continue budgeting and awarding.