



UNIVERSITY OF CENTRAL FLORIDA

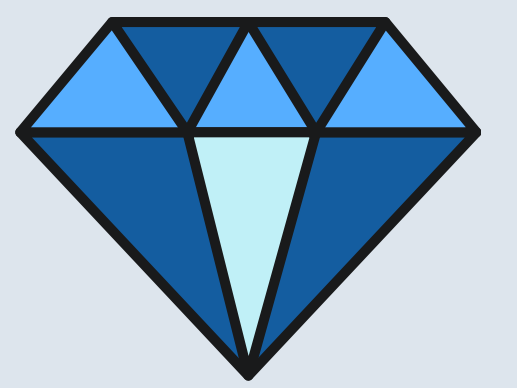
# Procedures, Processes & Tasks: Oh My!

**Award Winner:** University of Central Florida

**Year:** 2024

**Award Level:** Sapphire

**Category:** Gift Administration & Data Services



## Supporting Materials UCF Foundation Gift Services Team Task Process Review

Task	Owner	Individual Who Supports Task	When is Support Provided	Up to date training manual Y/N/Unknown	Process Workflow Documented Y/N/Unknown	Frequency Daily/Weekly/Monthly/As Needed	Expected turnaround time	Notes
Monitoring the bank accounts for new funding								
Checking the mail								
Opening the mail								
Assign/Take cash to bank for deposit								
Prepare Backup and Assign Batch: Checks								
Prepare Backup and Assign Batch: Cash								
Prepare Backup and Assign Batch: BBIS								
Prepare Backup: University payroll								
Import and Assign Batch: University Payroll								
Prepare Backup: GKC payroll								
Prepare Backup: GKC charitable								
Prepare Backup: GKC non charitable								

## Project Summary

The UCF Foundation is growing! In preparation for the campaign, and with the addition of new team members and roles in the gifts services department and across the foundation, there was a need to review all tasks conducted by the gift services team.

Conducting this review process provided insights for opportunities to cross train team members, create or update operating materials for tasks, and realignment of tasks with specific team members, etc.

All in all, it was a project that provided value and clarity for the team to charge on for the upcoming campaign season!

## Contact Information

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## Aspire Awards

