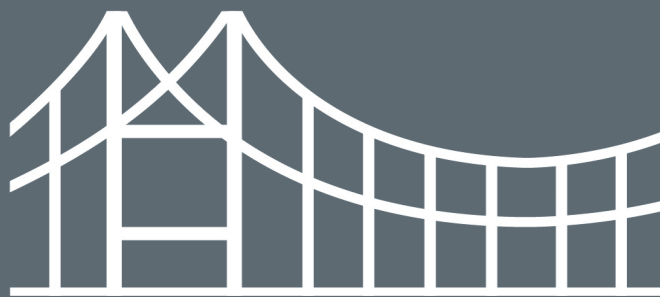


Bridging the Gap

The purpose of the Bridging the Gap series is to allow UC Berkeley thought leadership, faculty, and staff to excel together by providing a forum to discuss emerging and hot button issues, foster an open exchange, and inform decision-makers.



Space for our sessions is limited so please register using the UC Learning Center available in the "Self Service" section of the blu portal. For additional information please visit our website at <http://audit.berkeley.edu/resources/bridging-the-gap>, email us at audit@berkeley.edu, or call us at 642-8292.

Audit and Advisory Services Vision Statement

As a trusted partner, we provide independent, objective, and risk based information and assurance at the right time to the right people to foster effective decisions.

Ask the Auditor

Do you have a question for Audit and Advisory Services? Please e-mail it to audit@berkeley.edu or submit it online at: <http://audit.berkeley.edu/services/ask-auditor/submit-your-question>.

Using Your Restricted Gift Funds Thursday, March 16, 2017 150 University Hall 10:00-11:30 am

Private philanthropic support is increasingly important to UC Berkeley, but not all philanthropic support is unrestricted. In making gifts, donors sometimes provide us with specific guidance regarding their philanthropic intentions, and it is our shared responsibility to ensure that we fulfill those intentions. In this session, we will provide a brief description of how we come to understand and document donor intentions, explain the difference between unrestricted and restricted funds, define restrictions and preferences, and illuminate the data and tools that are available in BAIRS and the Campus Advancement Database System (CADS) to help you in spending these funds.

Session Lead Notes

Nancy Lubich McKinney is the executive director of Donor and Gift Services and is responsible for providing an end-to-end spectrum of service that picks up from the point of donor solicitation and follows a gift through processing and acceptance, fund creation and management, and donor acknowledgement and recognition. Nancy started this second career in 2004, after a 17-year career at Bank of America and three years as an independent consultant. She is the past president of the Association of Donor Relations Professionals (ADRP). Her team has administrative responsibility for all private charitable contributions to UC Berkeley, representing cash and pledges of more than \$400 million annually, and manages 12,000 active gift funds. As an advocate for donor interests, Donor and Gift Services manages an array of programs that acknowledge and recognize donors in meaningful ways, report to them on the impact of their philanthropy, and engage them with the campus.

Allison (Ali) De Gros is the director of Fund Management within Donor and Gift Services. Ali began her career with the University of California, Santa Cruz in 2006 and came to the Berkeley campus in 2008. In 2010 she joined University Relations as Associate Director for Donor Stewardship. In 2013, after successfully managing the campus-wide endowment and special fund reporting and stewardship programs, she was asked to lead the newly formed Fund Management team where she would blend her stewardship knowledge with policy and data analysis. Ali earned her B.A. from the University of California, Santa Cruz in Political Science & Legal Studies. Her team is responsible for the establishment of current-use and endowment funds (gift funds). Fund Management oversees the administration of gift funds and gift fund policy, and the group is the campus contact for reviewing and accepting new fund terms.