

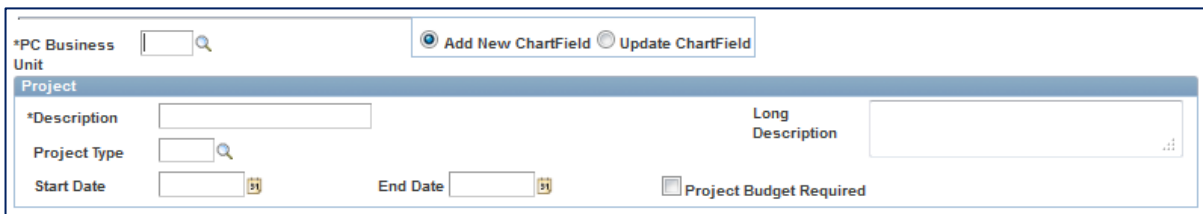
IMPORTANT – SUPPORTING DOCUMENTATION MUST BE SUBMITTED FOR AN ENDOWMENT PROJECT REQUEST TO BE APPROVED: Once you have submitted the Chartfield Project Request Form, the request will be assigned a “Request ID” in ARC. Please email the supporting documentation to endowmentadmin@columbia.edu, and include the fund name and request ID in the subject of the email. Supporting documentation may include: Gift/Pledge/Life Income Agreement, Will, Trust, Solicitation/Appeal, "Quasi" letter (available on Endowment Admin website).

Requesting a New Endowment Project

1. Select a PC Business Unit as GENRL – general

Project Section:

2. Fill in all required fields. Fill in Project Type by clicking the look up icon and select Project Start and End Dates by clicking the calendar icon.



| Field | Field Description | Required / Optional |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Business Unit | General classification of a Project - General | Required |
| Description | Project Title – the “short” name should have sufficient detail to know what it represents | Required |
| Long Description | The “long” name should be the exact name of the fund as indicated in the donor's document. If it is a quasi endowment directed by CU, please give it a name to indicate the school/department it belongs to and/or describe its intended use. | Required |
| Project Type | Enter Project Type – see Note below | Required |
| Project Start Date | Project Start Date | Required |
| Project End Date | Project End Date – Do not enter unless the endowment truly has an end date specified by the donor in the agreement | Do not enter |

Note: Please select an ARC project type. If you are not certain, select EHDVY. This field will be reviewed closely and edited by Endowment Compliance, as needed. See Endowment and Gift Fund Administration and Compliance policy for further details on each type.

<https://universitypolicies.columbia.edu/content/endowment-and-gift-fund-administration-and-compliance>

| ARC Project Type | FAS Fund Group | Definition |
|------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EHDVN | 65 | A “true” endowment, permanently restricted at the direction of the donor. Most new endowments, under NY State’s “NYPMIFA” legislation, do not carry a restriction on spending historic dollar value (total of the original gifts to the fund). These endowments may be spent prudently, even while underwater. |
| EHDVY | 66 | A “true” endowment, permanently restricted at the direction of the donor. These funds prohibit spending historic dollar value (total of the original gifts to the fund), typically by language in the gift agreement that indicates CU may never spend the original gifts to the fund. These endowments may not be spent while underwater. |
| EQUAS | 63 | A quasi endowment (sometimes called “board designated”) is a fund that functions like an endowment, but without any legal restriction to hold the fund permanently. |
| ETERM | N/A | Funds restricted for a period of time, but then released from restriction after a certain date or event. |

General Section:

- Fill in all required and relevant fields.

Getting Help

Please contact the Finance Service Center
<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now
<https://columbia.service-now.com>