UW Foundation Funds Guidelines

We would like to take this opportunity to share a few of the guidelines for depositing gifts and submitting requests for reimbursement by the UW Foundation. These policies were developed in consultation with the University of Wisconsin Foundation and are designed to honor the intent of donors, and to give you the flexibility to use them in ways that further the goals and morale of your units. In order to serve you better and to avoid unnecessary delays, we ask that you to follow these guidelines before submitting requests.

* All questions in regard to Foundation deposits and reimbursement should be directed to Beth Walsh or Melissa Amos-Landgraf.
* The Foundation accepts only those gifts that meet **all** of the following criteria:

1. The gift must provide support for broadly defined activities.
2. No detailed technical and/or financial reports are required.
3. No patents, copyrights and other intellectual property rights are claimed by the donor.
4. The gift contains no restrictive provisions.
5. The gift is irrevocable by the donor.

* UW Foundation Funds may be used to pay for meals involved in faculty recruitment, meeting with departmental visitors from outside the University, and other business purposes. Charges for meals that are in excess of University limits and reasonable costs of alcoholic beverages can be submitted through E-Reimbursement for payment by the UW Foundation. The UW Foundation has set a limit of **$75.00 per person** on gift funds for meal reimbursement which includes food, drink, tax and tip.
* Expenses that can be paid through University funds should not be submitted to the Foundation for reimbursement. Proper management of funds, timeliness of withdrawals and transfers to the 233 funds is a very important part of the stewardship of Foundation funds.
* Proper receipts/invoices and documentation must accompany all e-reimbursement requests, including those that will be charged directly to UW Foundation funds.
* Reimbursement for receptions that are held in private homes are permissible only if they are:

1. A business reception at the home of a University employee for faculty or graduate student recruiting, for visiting speakers or other outside visitors will be allowed. Please include the names and affiliation of the people attending and a business agenda.
2. A reception at a staff member’s home for social events for faculty and staff will be allowed only if paid through the department’s community fund**.**

* The Foundation **does not** reimburse expenses for retirement or social events for faculty and staff unless an account specifically for this purpose has been created (e.g. xxxx Department Community Fund).

If you have any questions about gift deposit and/or reimbursements by the UW Foundation please contact Beth Walsh (263-5559 or [bwalsh@education.wisc.edu](mailto:bwalsh@education.wisc.edu)).