

## Davie 201 – Stewardship: Terminology

<b>Acknowledgee</b>	The individual being thanked for a gift.
<b>Acknowledgement</b>	Process to produce data for acknowledgement letters. Found under Marketing and Communications/Donor Relations. DO NOT use Marketing Acknowledgements.
<b>Administrator</b>	Location where the purpose is held. For example, University Endowment or Medical Foundation.
<b>FERPA</b>	<b>Family Educational Rights and Privacy Act (FERPA)</b> Under the federal FERPA, personally identifiable information may not be released from a student's education records without his or her prior written consent. More information may be found at <a href="http://registrar.unc.edu/academic-services/uncferpa/">http://registrar.unc.edu/academic-services/uncferpa/</a>
<b>Inactive Designation</b>	An inactive designation/purpose means we are no longer accepting money to that designation and do not want it to appear for online giving. It does not mean the fund itself is inactive.
<b>PeopleSoft Business Unit</b>	Distinguishes to which legal entity the Fund belongs (usually UNCCH). Some exceptions are UNC General Administration and University Foundations, which will have their own business units.
<b>PeopleSoft Department</b>	Similar to the FRS department but with more detail. At higher levels, it reflects the organization of the University, but at lower levels can be used to identify locations, sub-departments or other structural divisions.
<b>PeopleSoft Fund</b>	Identifies the major fund group from which an entity is spending. Examples are State, Unrestricted, Restricted, and Endowments. Fund also identifies how the funds are being spent, e.g., for research, instruction, etc. The Fund field is used in conjunction with Source to provide accountability and reporting.
<b>PeopleSoft Source</b>	Identifies the original source of funding, i.e. a named individual gift, individual scholarship or specific activity. Sources are ranged so that similar-acting sources are grouped together.
<b>Purpose</b>	The funds money goes into when someone makes a gift to the University; purposes are also sometimes called designations. The <b>Lookup ID</b> six-digit number is composed of the 2-digit site number followed by the 4-digit designation number.
<b>Recipient</b>	A constituent who has received funding from a purpose. This could be a scholarship recipient or the holder of a professorship. Davie users who have attended a Stewardship class can add and edit recipient information on purposes.

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<b>Recognition Program</b>	Giving societies such as the Chancellor's Clubs, Dean's Council, etc. Recognition Programs are listed for each constituent under the <b>Revenue</b> tab on the <b>Recognition</b> sub-tab in the <b>Recognition programs</b> section.
<b>Report Code 1</b>	The old FRS account number.
<b>Report Code 2</b>	The old FRS department number.
<b>Stewarded Donor</b>	Located on the Stewardship tab of the purpose, stewarded donors are the individuals who receive stewardship information annually. Often, but not always, the list of stewarded donors on a purpose includes the principal donor.
<b>Tributee</b>	The individual being honored by a tribute gift. The tributee has to have a record in Davie.