

ANNUAL ENDOWMENT REPORT GUIDE




AER TIMELINE

- **April 1:** Portal opens to all users. FIQ reporting begins.
- **June 11:** Content for Dean’s message and C/U highlights must be e-mailed to Central Donor Relations.
- **August 30:** All narrative reports (fund impact questionnaires) for Tier A funds and Tier B scholarship funds must be submitted through the portal.
- **September & October:** Central collates, prints, and mails all AER reports.
 - **Note:** Notifications of the AER mailing will go through WIX

AER PACKET CONTENTS

Tier A	Tier B	Tier C
VP Message	VP Message	VP Message
Dean's/Director's Message and Unit Highlights	Dean's/Director's Message and Unit Highlights	Dean's/Director's Message and Unit Highlights
Personalized Fund Financial Data	Personalized Fund Financial Data	Personalized Fund Financial Data
Endowment Performance Booklet	Endowment Performance Booklet	Endowment Performance Booklet
Glossary of Terms	Glossary of Terms	Glossary of Terms
Donor Satisfaction Survey	Donor Satisfaction Survey	Donor Satisfaction Survey
Personalized Fund Impact Report (FIQ)	Personalized Fund Impact Report (FIQ) SCHOLARSHIP FUNDS ONLY	

PORTAL TIPS

- All FIQ reports should match the fund purpose. Users may find the fund purpose under the “General” section of the portal’s FIQ section. If the FIQ report does not match the fund purpose then please contact Patrick Sell.
- Utilize the filter function  to sort your funds by C/U; fund type; or FIQ status. Users can also use the search function  to quickly locate a specific fund.
- Users can filter for more than one criterion at one time. Users can also save filters that they will use most often, i.e., College of Education scholarship funds.
- Fund administrators can filter for their name to find all funds to which they are assigned.
- Use the FIQ export function to preview a draft of the completed FIQ report. Utilize the preview function to ensure the FIQ report is aesthetically pleasing and contains no errors.
- Use the export icon  on the Landing Page to create an excel spreadsheet of fund statuses.
- Utilize the AER FIQ Dashboard to track your college or unit’s FIQ progress.

FIQ TIPS

- Please respond thoroughly and thoughtfully to each fund impact questionnaire. The best reports tell a compelling story of how philanthropy creates a positive and tangible impact on academia.
- When answering the narrative questions, include details that would be most interesting to the donor.
- Remember to thank the donor. This is your opportunity to let donors know that they are enabling UF to Go Greater.
- Central will mail all AER reports to donors. Development Officers may hand-deliver reports in addition to Central’s mailings. Please e-mail Patrick Sell with any hand-delivery requests.
- Copies of all mailed reports will be uploaded to the donor imaged docs in CDFS.

AER CONTACTS

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