



## **Gift Compliance Portal Overview**

The Gift Compliance Communication Portal is more than a platform, it marks a cultural shift in how Texas State University manages donor stewardship, fund compliance, and internal collaboration. Aligned with the donor relations strategy of University Advancement, the portal reinforces donor intent, advances transparency, and builds long-term donor trust through accountable stewardship. By strengthening the infrastructure behind donor engagement, it ensures that academic and administrative units have the clarity and resources needed to serve as effective stewards of donor funds.

At its core, the portal gives faculty and staff real-time access to critical documentation, including MOUs, compliance overviews, quarterly activity reports, award spending data, FAQs, and training resources. It addresses a longstanding need for centralized communication, streamlined reporting, and improved transparency in managing more than 1,400 donor gift fund agreements.

Developed entirely in-house by the Gift Compliance team, the portal launched in January 2025 without additional staffing or outside consulting. The project was driven by an institutional need for better access and transparency, and its adoption has been immediate and substantial. Since launch, the portal has recorded more than 13,900 visits from 112 unique university users. In just a 30-day window, the HUB landing page alone saw 2,780 visits, demonstrating that users are returning frequently for essential stewardship tools.

Engagement metrics validate the portal's effectiveness. FAQs and the Disbursement Request Form are the most accessed resources, signaling that users rely on the portal for practical guidance and operational support. Across colleges and divisions, Activity Reports top the list of resources accessed, confirming that academic units actively use the portal to track spending and compliance status.

### **DIVISION OF UNIVERSITY ADVANCEMENT**

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The portal is reaching the very audience it was designed to serve. The most engaged users are from the College of Liberal Arts, College of Fine Arts and Communication, and College of Health Professions, units that oversee high volumes of donor funds and historically required intensive support. With centralized access and automated report delivery, these colleges now manage compliance more independently and efficiently.

Unlike traditional stewardship systems that rely on static spreadsheets, fragmented emails, or reactive reporting, the portal introduces a proactive, dynamic, and integrated platform for managing donor gift compliance. It has shifted the Gift Compliance team from reactive task management to proactive stewardship support. With recurring fund data updates and self-service access, the team now has greater capacity to provide consultative guidance and strategic solutions.

The project also establishes a scalable model for future Advancement-led tools. Its SharePoint architecture and collaborative development approach are now being applied to other initiatives, such as stewardship planning, reporting dashboards, and training resources.

Most importantly, the Gift Compliance Communication Portal positions Texas State University to uphold the highest standards of donor intent and accountability. By streamlining internal processes, empowering faculty and staff, and embedding transparency into daily operations, the portal strengthens the foundation of donor trust, ensuring that every gift is managed with integrity and impact.

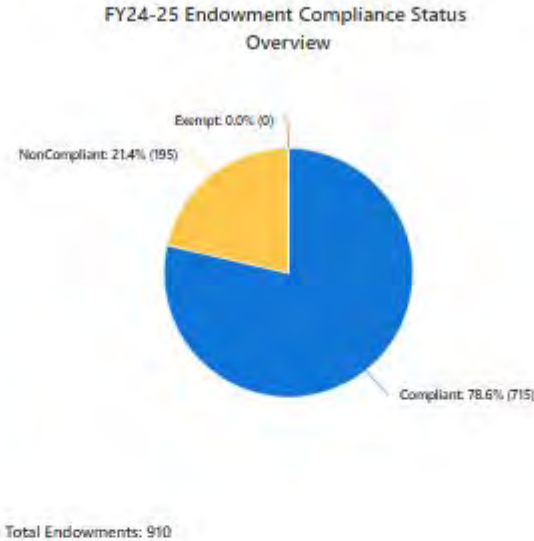
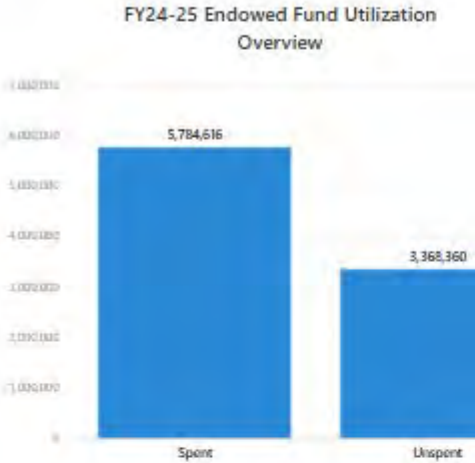
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## Utilization Overview

### Current Academic Year Preview as of April 24, 2025



### Prior Academic Year Preview

## Important Dates

### Countdown

#### Scholarship Awards Due

28

days

Current Academic Year Payments due by June 20th

#### Program Fund Utilization Report

112

days

FY25 EOY Fund Use Report Due by September 15th

## Quick Links

### Request Forms

[Disbursement Authorization Form: Fillable](#)

[Disbursement Authorization Form: Adobe Sign](#)

[Training Request](#)

### Guides

[Welcome to the Endowment](#)

[Gift Compliance Guide](#)

[Contact Us](#)

### Calendar Events

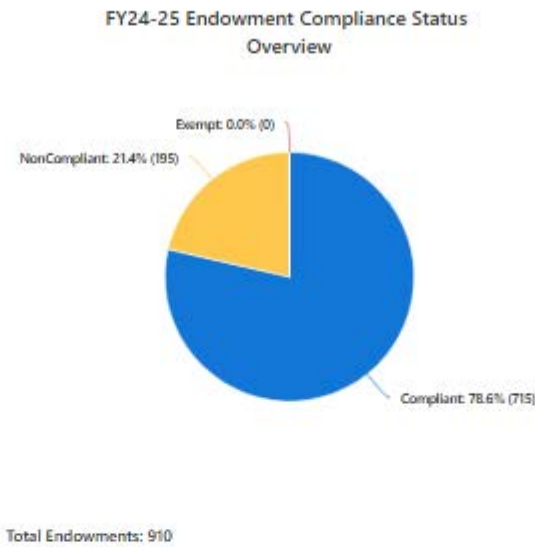
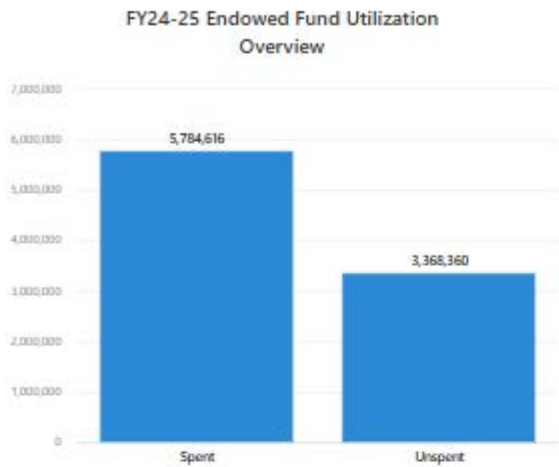
[See all](#)

[+ Add event](#)

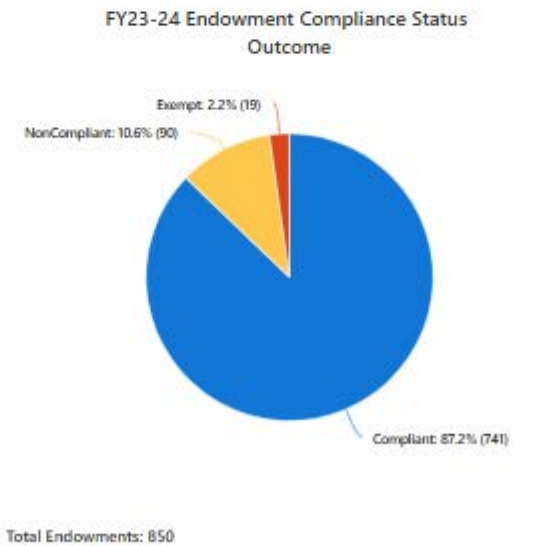
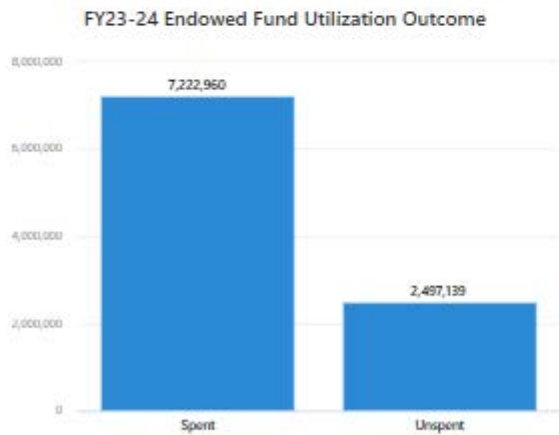
JUN 20	All Scholarships for Summer Session to be Offered/Awarded Fri, Jun 20, All day
JUL 10	Final Activity Report FY25 Portal Load Thu, Jul 10, All day
SEP 1	Program Support EOY Fund Summary Report FY25 Request Mon, Sep 1, All day

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- |           |   |
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## Important Dates

Utilization: Overview

Quick Links

[GCUP Home:](#)

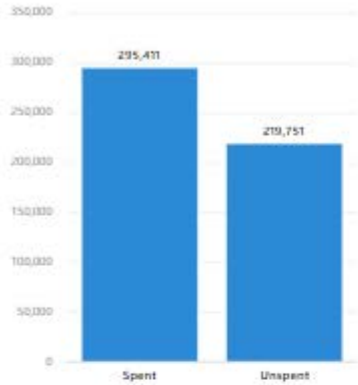
[Stewardship Reports](#)

[MOUs](#)

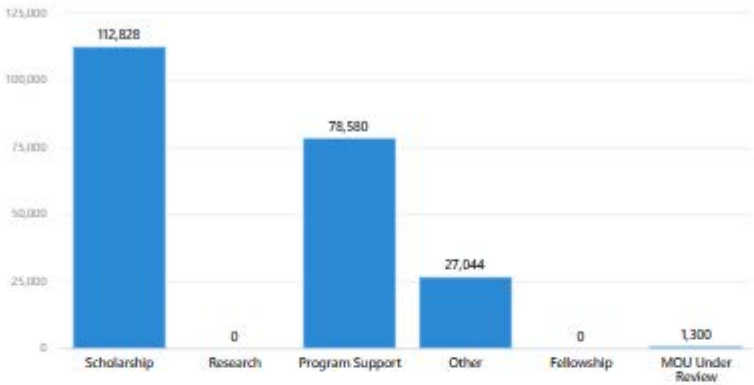
[FAQ's](#)

[Contact Us](#)

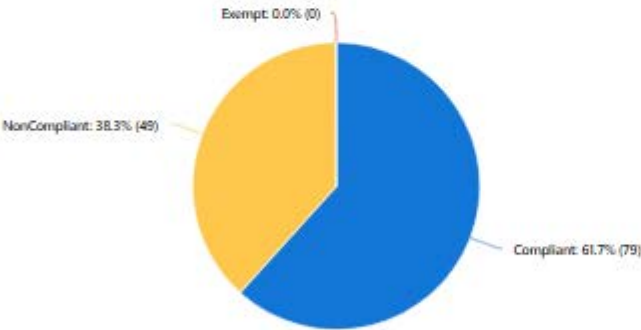
Endowed Fund  
Utilization Overview  
as of 4/24/2025



Unspent Endowed Funds  
by Support Area  
as of 4/24/2025



Endowment Compliance Status  
as of 4/24/2025



Total Endowments: 128

To review endowments that are not in compliance, access the most recent **Activity Report** and apply filter to the "Compliance Status" column.

▼ Stewardship Reports

▼ MOUs

## ^ Stewardship Reports

### Activity Reports

  Name ▾ ▾

 2024-2025 Academic Year

### Distribution Reports






  Name ▾

 FY26 (2025-2026 Academic Year) Endowment Distribution Report College of Fine Arts & Communication.xlsx

## ^ MOUs

### MOU Library (Fine Arts)

[See all](#)

		MOU ID ▾	MOU Name ▾	MOU Type ▾ ▾	Department ▾	Use ▾	Degree Level ▾	Managing Entity ▾
		67422	Excellence Fund in Communication Studies	Endowed	Communication Studies	Program Support	Undergraduate, Graduate	Development Foundation
		67885	The Steven A. Beebe and Susan J. Beebe Communication Studies Graduate Research Endowment	Endowed	Communication Studies	Scholarship	Graduate	Development Foundation
		67977	Wilbern Family Presidential Endowed Scholarship	Endowed	Communication Studies	Scholarship	Undergraduate	Development Foundation

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