GIFT DEVELOPMENT

GIFT OFFICER MEETS WITH DONOR(S) TO DEVELOP POTENTIAL SCHOLARSHIP NAME, PAYMENT SCHEDULE AND CRITERIA

GIFT OFFICER CREATES DRAFT GIFT AGREEMENT USING TEMPLATES FOUND IN ONEDRIVE

DONOR RELATIONS REVIEWS THE DRAFT GIFT AGREEMENT FOR ACCURACY/STANDARDIZATION, AND ADDS TO THE GIFT AGREEMENT TRACKER

REVIEW

IF ANNUAL OR ENDOWED SCHOLARSHIP

VICE CHANCELLOR FOR ADVANCEMENT REVIEWS AND WORKS WITH PROVOST FOR APPROVAL REGARDING CURRICULUM

IF ANNUAL OR ENDOWED PROGRAM SUPPORT

DONOR RELATIONS ALERTS THE ADVANCEMENT ACCOUNTANT TO CREATE THE NEW DESIGNATION IN THE DATABASE

DONOR RELATIONS PROVIDES ANY FEEDBACK REGARDING CHANGES TO THE GIFT OFFICER AND WAITS FOR GREEN LIGHT

DIRECTOR OF SCHOLARSHIPS REVIEWS THE DRAFT GIFT AGREEMENT TO APPROVE COMPLIANCE AND CRITERIA

FINALIZATION OF DRAFT

DONOR RELATIONS REVIEWS THE DRAFT GIFT AGREEMENT FOR ACCURACY/STANDARDIZATION, AND ADDS TO THE GIFT AGREEMENT TRACKER

DONOR RELATIONS MAKES COPIES AND COLLECTS SIGNATURES FROM VICE CHANCELLOR FOR ADVANCEMENT FIRST, THEN CHANCELLOR

DONOR RELATIONS REVISES THE GIFT OFFICER OF FULL EXECUTION AND MAILS THE COPIES TO THE DONOR FOR SIGNATURES WITH COVER LETTER AND RETURN ENVELOPE

DONOR RELATIONS PROVIDES CONTACT DATA FOR SCHOLARSHIP MANAGER SOFTWARE AND ADDS RELATIONSHIPS TO DATABASE

COLLECT SIGNATURES

DONOR RELATIONS UPDATES THE TRACKER TO REFLECT THE "PENDING SIGNATURES" STATUS

FINAL SIGNED COPIES RECEIVED

NOTIFICATION + DOCUMENTATION

DONOR RELATIONS CONFIRMS WITH GIFT PROCESSOR THAT PLEDGE IS IN DATABASE

ADVANCEMENT ACCOUNTANT SENDS A NOTIFICATION AND DIGITAL COPY VIA EMAIL TO APPROPRIATE UNITS

DONOR RELATIONS SCANS FINAL SIGNED COPIES, ADDS TO DIVAULT AND THE VAULT AND DISTRIBUTES VIA EMAIL