

WCU | GIFT AGREEMENT PROCESS | FY21

Stage 1 GIFT DEVELOPMENT	
GIFT OFFICER + VC	
Discuss	Discusses potential gift with supervisor for endowed, annual, major, planned gifts. <ul style="list-style-type: none"> If program support, VC must vet through Provost per Policy 104.
GIFT OFFICER	
Develop	Works with Donor to develop fund, designation, payment schedule, criteria.
Create	Creates DRAFT gift agreement using current templates found in Teams.
Alert	Alerts Adv. Accountant and Gift Processing to create new fund in RE. <ul style="list-style-type: none"> If installments, provide pledge info. If stock, notify Foundation Accountant.

Stage 2 DONOR RELATIONS REVIEW	
GIFT OFFICER + VC	
Send	Sends DRAFT agreement to Supervisor for approval, <i>then</i> to Donor Relations for review.
DONOR RELATIONS	
Track	Adds new gift agreement to the TRACKER in Teams, and relationships to fund in RE.
Review	Reviews DRAFT agreement for: <ul style="list-style-type: none"> Accuracy Formatting Standardization
Send	If scholarship, sends DRAFT to Director of Scholarships for vetting.

Stage 3 SCHOLARSHIPS OFFICE REVIEW	
DIRECTOR OF SCHOLARSHIPS	
Review	Reviews DRAFT agreement for: <ul style="list-style-type: none"> Compliance Criteria Award Potential
DONOR RELATIONS	
Feedback	Provides any feedback regarding edits to Gift Officer for updating.
GIFT OFFICER	
Update	Makes any updates and reviews FINAL draft with Donor and Donor Relations.

Stage 4 ROUTING FOR SIGNATURES	
GIFT OFFICER	
Go!	Gives GREEN LIGHT that Donor approves and agreement is ready to route.
DONOR RELATIONS or ADMIN	
Internal	Make copies and collects signatures from: <ul style="list-style-type: none"> VC of Advancement Chancellor
External	Collects Donor signatures through US Mail or Adobe Sign.
FINAL SIGNED COPIES RECEIVED	

Stage 5 DOCUMENTATION + STEWARDSHIP	
DONOR RELATIONS + ACCOUNTANT	
Distribute	Final signed agreement distributed to campus partners via email.
Notify	Adv. Accountant sends notification to appropriate units.
File	Adds signed agreement to: DiVault, RE, and Donor Portal.
Complete	Updates the TRACKER to reflect completion.
Thank	Coordinates all VC and Chancellor level Thank You letters.

KEY:

VC ADVANCEMENT

GIFT OFFICER

DONOR RELATIONS

SCHOLARSHIPS OFFICE

ADV ACCOUNTANT