

# What's the gift agreement process?

## Step 1



Once the donor(s) indicates the intent to make a gift that will establish a new account within The Ohio University Foundation, the gift officer submits

a gift agreement request form to [donorrelations@ohio.edu](mailto:donorrelations@ohio.edu).

## Step 2



Donor Relations drafts a gift agreement and shares the draft with the CFO of The Ohio University Foundation to

ensure accuracy, completeness, clarity and compliance with University Policy.

## Step 3



Once review is complete, the approved gift agreement is returned to the gift officer for presentation to the donor(s).

## Step 4

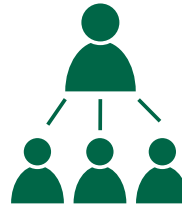
The gift officer shares the draft agreement with the donor(s). If



substantive changes are requested by the donor(s), the gift officer discusses those proposed changes with Donor Relations. After their discussion and requisite edits, the draft gift agreement is returned to the CFO for review.

## Step 5

The draft gift agreement is forwarded to the assistant vice president, Advancement Services; assistant vice president, Development; senior director, Donor Relations; the appropriate division vice president and/or academic dean; and the director, Student Financial Aid and Scholarships (when applicable) for review. The gift officer is copied on this communication.



## Step 6

When final agreement is reached among all parties, Donor Relations sends the gift agreement electronically to the administrative resource manager to print two copies of each agreement and to route ALL copies of the document internally for signing by: the assistant vice president, Advancement Services; vice president, University Advancement; and appropriate division vice president and/or academic dean.



## Step 7



Once all appropriate internal parties have signed, the gift agreements

(all copies) are mailed by Donor Relations to the donor(s) for signature. One copy is kept by the donor for his/her records and one copy is returned to Donor Relations.

## Step 8



With both the donor(s) and program representatives' signatures, copies of the completed gift agreement are forwarded to: vice

president, Development; the unit gift officer; director, Student Financial Aid and Scholarships (when applicable); The Ohio University Foundation; Prospect Research; and Advancement Operations. The original is retained by Donor Relations.

## Step 9

The CFO oversees the posting of the gift information into The Foundation's accounting system and the adding of the final gift agreement into the University's document imaging system.

