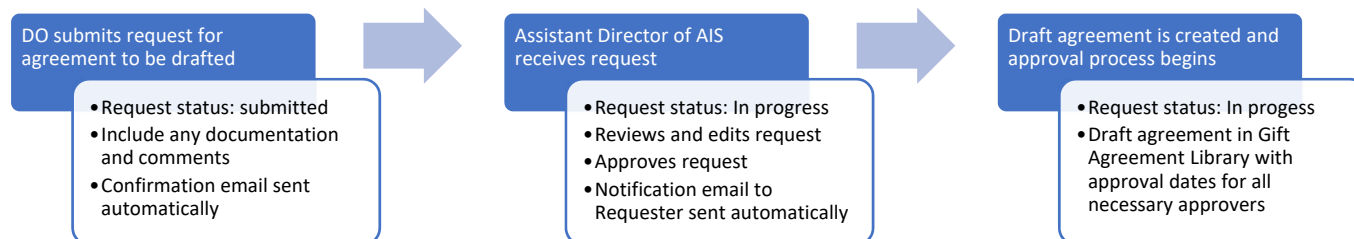


Gift Agreement Requests

In general, a written donor agreement should be obtained for any gift or pledge that:

1. is for \$100,000 or more *and/or*;
2. establishes a new named fund (endowment or current-use) *and/or*;
3. is for a project or program that requires a commitment of funds by the Institute or requires the Institute to satisfy donor-stipulated terms or conditions *and/or*;
4. is for a naming opportunity, apart from one-time naming opportunities of less than \$25K



Requests to draft a new gift agreement should be submitted via The Nucleus. The status of the request can be tracked and a link to an agreement in the Gift Agreement Library makes the draft easy to access.

To submit a new Gift Agreement Request

1. On The Nucleus, go to *Advancement Information Services > Gift Agreements*.
2. Click on [Submit a New Gift Agreement Request](#) link.
3. The request form opens. Fill out fields as applicable – please read the instructions for each field listed on the form or in tool tips.

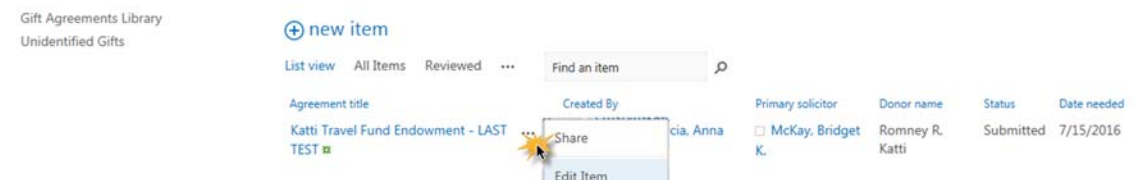
Notes:

- First time users will be prompted to log in to PowerApps. Please follow prompts to activate using your access.caltech login.
 - Required fields are marked with *
4. Click **Save** button at the bottom of the form.

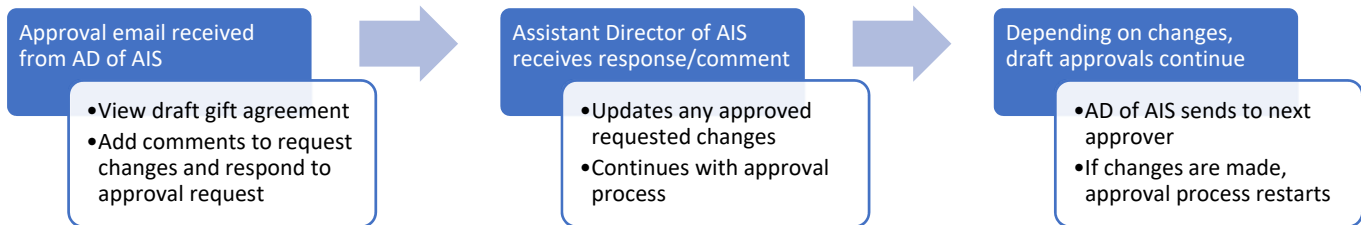
Note: Assistant Director of AIS and AVP of Development are automatically notified when a new request is submitted. Assistant Director of AIS will contact the requestor with any questions. Once the request is approved, the request’s status is changed to “In Progress” and a link to the draft document is added. The requestor and the DO listed on the request will receive notification via email.

To view status of your submitted request

1. Click on *Gift Agreement Requests* link or use link provided through confirmation email
2. You can see the status of your request.
3. To edit the details of the request, click on the ellipsis button next to the title, then select **Edit Item**

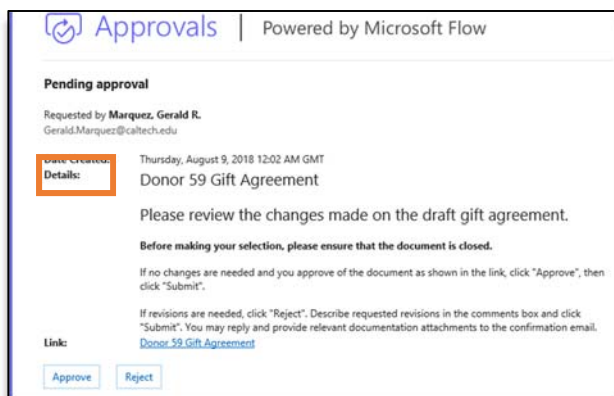


Gift Agreement Approval Requests

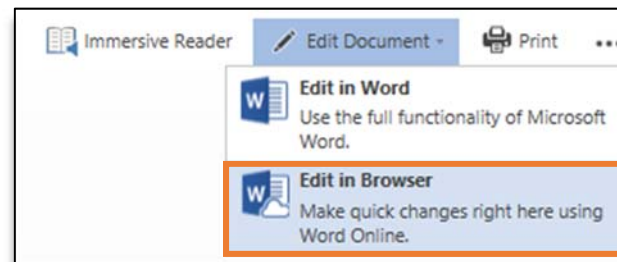


Responding to an Approval Request

1. Once approval email from has been received, read the **details** section for instructions.



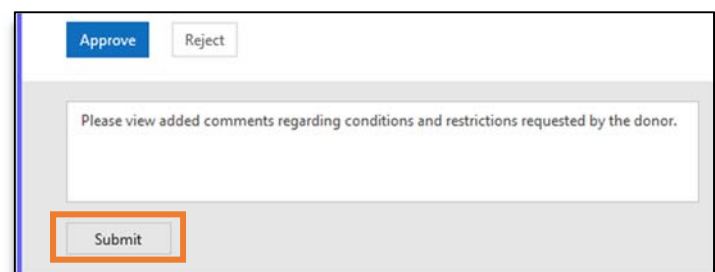
2. Click the link provided to view the agreement draft. If no changes are needed, **skip** to step 4.
3. To request any changes, follow the following options.
 - a) Preferred method: Click **Reject**. Describe requested revisions in the comment box and click **submit**. You may reply and provide relevant documentation attachments in the confirmation email.
 - b) Within the draft, click **Edit Document > Edit in Browser** to make minor edits. Describe all edits within the approval comment box and click **submit**.



4. After reviewing, **close** document.
5. On the approval email, click **Approve** if there are **no requested changes**. Click **Reject** if **requesting changes**. Describe any requested changes within the comments and click **submit**.

Notes:

 - a) Comments are included in document version history
 - b) You may be redirected to the Flow app within Office 365 to approve. Follow the prompts to open the request in the application.
6. Click **Submit** to send approval.



Learn more at the Gift Agreement Central on The Nucleus, or contact Chris Meneses at cmeneses@caltech.edu.