General Description and Risk Review

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| --- | --- |
| **Chair Name**  |  |
| **Chair Type** |  | e.g., Permanent Endowed Chair, Limited Term Chair.  |
| **Total Donation** | $ | **Received over (# years)** |  |
| **Sponsoring Dean /College**  |  | **Department** |  |
| **Gift Agreement Drafted?** | Y/N | **Author** |  |

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| --- |
| **Risk Review**  |
| **Project Benefits and Opportunities** | Summarize any opportunities for as a result of accepting these funds. E.g., in support of a specific IP Goal, how it strengthens or supports the University’s mandate and Strategic Areas.   |
| **Project Costs and Risks**  | Summarize any risks associated with acceptance of these funds e.g., ability to deliver, constraints, potential gaps created (financial or other resources/commitments),   |

Funding and Commitment Summary

|  |  |  |  |
| --- | --- | --- | --- |
| **Total Donation** | **$** | **Received over (# years)****Attached financial plan if available** |  |
| **For Endowment Funding**  |
| **Value of Permanent Endowment**  | **$** | **Year Completed** |  |
| **Endowment Annual Payout**  | **$** | **Payout Rate** | **%** |
| **Total Annual Commitments**  | **$** | **Over How Many Years**  |  |
| **Describe main direct commitments**  | e.g., Tenure track faculty salary or portion |
| **Are there any funding commitments greater than gift?**  | *If yes, explain how these are to be covered with the College/unit budget.*  |
| **For Limited Term Funding**  |
| **Total Term Contributions**  | **$** | **Over How Many Years**  |  |
| **Total Temporary Commitments**  | **$** | **Over How Many Years** |  |
| **Describe nature of direct commitments**  | e.g., Tenure track faculty salary or portion |
| **Total Base Commitments**  | *Are there any University base commitments beyond the Term of the gift? How are these to be covered?* |
| **Are there any funding commitments greater than gift?**  | *If yes explain how these are to be covered with the College/unit budget.*  |

Approvals

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| --- |
| **APPROVALS:****The undersigned certify that the gift agreement meets all the requirements of, and is consistent with, the University’s Policy on Endowed Chairs;** |
| **Prepared by**  |  | **Date** |  |
| **Dean or Division Head** |  | **Date** |  |
| **AAD**  |  | **Date** |  |
| **Provost/VP Academic** |  | **Date** |  |