

## What is the Family Giving Center intake process?

Relationship Management	FGC Prospect		Family Giving Center Client	
<b>1. Opportunity arises</b>	<b>2. Needs are documented</b>	<b>3. Feasibility is determined</b>	<b>4. Approval to Proceed</b>	<b>5. Work proceeds</b>
A conversation takes place with donor/advisor, potential donor, or other FGC prospect.  DRO or Dev notices potential need or requested services beyond what may be typical.	Intake discussion(s) take place to refine, understand, and document the specific needs and desired outcomes.	Discussion(s) with relevant OCF staff & their VPs take place in order to draft a proposed Scope of Work (SOW) with timeline and concrete deliverables.	SOW is reviewed by VP of DR/FGC and if needed referred to GAC (Gift Acceptance Committee) meeting for discussion/approval.  Agreement is signed.	Deliverables are completed.