

Directions for Requesting Prospect Assignments

9-21-10

- When a MGO/DO determines a person or organization to be a prospect, the MGO/DO requests assignment. If an Advance entity record already exists, the MGO/DO should use one of the online forms below to request assignment. If the prospect already has a manager, team assignment may only be requested after discussion with the manager.
 - [Major Gift Assignment Request Form](#) (for MGOs, possible gifts of \$25,000 or more)
 - [Suspect Assignment Request Form](#) (for MGOs or DOs, possible gifts less than \$25,000)
- If an Advance entity record does not already exist, the MGO/DO should use the online form [Add an Entity to Advance](#) to request the creation of an Advance entity record. After receiving a reply email with the newly created Advance entity id, the MGO/DO may then request assignment via the form mentioned in #1.
- MGOs may request major gift or suspect assignment. DOs may request suspect assignments. A prospect record may have both major gift and suspect assignments.

Major Gift Prospect Assignment Request Form

Major Gift Prospect Assignment Requests are submitted online and processed with information from completed forms. Incomplete forms are referred back to the requestor with specific instructions about what fields must be completed or reconciled (in the case of confusing requests).

FORM FIELDS

MGO Information:	
MGO name, college, preferred contact method, phone number, email address	
Prospect Information:	
Prospect Name, Advance Entity ID #, Planned Giving Prospect (Yes or No)	
Major Gift Assignment Information:	
Assignment Type	
Manager – I verify that no manager is currently assigned to this prospect	
Team – I verify that I have spoken with [Enter Manager Name and Date of Conversation] and received permission to be on the team	
Assignment Priority	
<i>Top</i>	= Ask in 12-18 months, proposal required
<i>Emerging</i>	= Will be Top in 12-18 months
<i>Discovery</i>	= MGO qualifying this person/company as a MG prospect
<i>Stewardship</i>	= Proposal funded, cultivation next
<i>Perpetual Stewardship</i>	= No more gifts, needs attention
Prospect Stage	
<i>Identified</i>	= Possible MG Prospect, but not verified personally
<i>Qualified</i>	= MGO has determined prospect has major gift potential
<i>Cultivation</i>	= MGO is working toward the ask
<i>Ask Made</i>	= MGO has asked for a specific gift
<i>Stewardship</i>	= A recent gift has been made, prospect will eventually return to cultivation
<i>Perpetual Stewardship</i>	= No more gifts can be expected, but prospect requires attention
Assignment Reason	
Include a brief, but substantial, reason for your assignment to this prospect	
Strategic Plan *Required for Top Priorities and prospects with Team assignments	
Include your next steps and timeline to move this prospect through the pipeline to an ask	

Suspect Assignment Request Form

Suspect Assignment Requests are submitted online and processed with information from completed forms. Incomplete forms are referred back to the requestor with specific instructions about what fields must be completed or reconciled (in the case of confusing requests).

FORM FIELDS

MGO/DO Information:
MGO/DO name, college, preferred contact method, phone number, email address
Prospect Information:
Prospect Name, Advance Entity ID #, Planned Giving Prospect (Yes or No)
Suspect Assignments:
Assignment Type
Manager – I verify that no manager is currently assigned to this prospect
Team – I verify that I have spoken with [Enter Manager Name and Date of Conversation] and received permission to be on the team
Suspect Type: choose Suspect, Suspect & Board Member or Suspect & Endowment Donor (Priority will always be Suspect)

Prospect Assignment Removal Form

Prospect Assignment Removals are submitted online and processed with information from completed forms. Incomplete forms are referred back to the requestor with specific instructions about what fields must be completed.

FORM FIELDS

MGO/DO Information:
MGO/DO name, college, preferred contact method, phone number, email address
Prospect Information:
Prospect Name, Advance Entity ID #, Assignment (Manager or Team), new Manager suggestion (if you have one)
Assignment Removal Option
<i>Not a major gift prospect for me</i> = Prospect indicated their giving interests lie elsewhere
<i>Not a major gift prospect for NCSU</i> = Prospect indicated they will never give to NCSU
<i>Qualification contact attempt unsuccessful</i> = No contact made after many repeated attempts over time
Reason for Removal
Include details of contact attempts, comments from the prospect, what led you to the conclusion you should not be assigned, etc
Recorded in Contact Report dated
List the date of the contact report that contains the details entered above