

Development staff are responsible for entering and updating their own proposals in a timely manner. Each proposal should appear on either an Active Proposal Report or Gift/Pledge Report, but not both.

NEW PROPOSALS

| | | |
|---|---|---|
| Start Date | Date you designated the prospect Top Priority and entered the proposal | Never updated |
| Type | Select: Early Stages or Verbal Proposal or Written Proposal | Never updated |
| Stage/Status | Enter the stage of: Active Cultivation or Ask Appointment Scheduled | Enter the status of: Ask Anticipated Requires update |
| Ant Ask \$ | On the day the proposal is entered, the amount you expect to ask for | Never updated |
| Ant Ask Date | Estimate which quarter of the year the ask will occur in (use last day of the quarter) | May be updated |
| Actual Ask \$ | On the day the proposal is entered, will be the same as Ant Ask \$ | Update as needed |
| Unit | Choose your area | |
| Title | Type a simple descriptive title (Ex. Endowed Scholarship for History Dept) | |
| Description | Optional – can be used to record anything, but is not a substitute for a contact report | |
| <i>* Remember to <u>create a proposal assignment</u>: fill in Assigned, Office, Type (PA), Unit and Start Date (= Proposal Start Date).</i> <i>* Remember to use contact report button to enter any related contact reports.</i> | | |

UPDATING PROPOSAL TO “ASK SUBMITTED” AFTER THE ASK HAS BEEN MADE

| | | |
|--|---|--|
| Stage/Status | Change the stage to: Negotiation | Change the status to: Ask Submitted |
| Actual Ask \$ | Update to reflect what you actually asked for | |
| Ant Dec Date | Enter the date you think the prospect will make a gift /pledge or tell you “no” | |
| Ant Dec \$ | Enter the amount you think the prospect will give or pledge | |
| <i>* Remember to use contact report button to enter any related contact reports.</i> | | |

UPDATING PROPOSAL TO “APPROVED BY PROSPECT” (GIFT OR PLEDGE RECEIVED)

** Update proposal when Gift or Pledge Transmittal with Proposal ID # is submitted to Alumni/Donor Records*

| | | |
|--|---|--|
| Stage/Status | Change the stage to: Planned Gift Made or Outright Gift Made or Pledge Made or Combination Made | Change the status to: Approved By Prospect |
| Granted \$ | Enter the amount of the gift or pledge transmittal | |
| Stop Date | Enter the date the gift or pledge transmittal was submitted | |
| Active box | Remove the check mark | |
| <i>* Remember to <u>deactivate the proposal assignment</u> by removing the check from the Active box <u>and</u> entering a Stop Date</i> <i>* Remember to use contact report button to enter any related contact reports.</i> | | |

UPDATING PROPOSAL TO “DECLINED BY PROSPECT”

| | | |
|---|--|---|
| Stage/Status | Change the stage to: Ask Declined | Change the status to: Declined By Prospect |
| Granted \$ | Enter \$0 | |
| Stop Date | Enter the date the prospect said “no” | |
| Active box | Remove the check mark | |
| <i>* Remember to <u>deactivate the proposal assignment</u> by removing the check from the Active box <u>and</u> entering a Stop Date.</i> <i>* Remember to use contact report button to enter any related contact reports.</i> | | |