

## Major Gift Proposal Directions

9-1-10

**Before the ask is made or when you request top prospect assignment priority, an anticipated ask of \$25,000 and up should be entered on Advance as a major gift proposal if the result could be processed as a gift per NC State's gift acceptance policy.**

Entities with Advance proposals should be top prospects and all top prospects should have a proposal entered on Advance. Top prospects will usually move through the solicitation cycle and result in an ask within 12-18 months. The Advance proposal should be updated as illustrated in the following pages.

### CREATING A NEW PROPOSAL:

**To enter a proposal on Advance, you should first be assigned to that prospect with an assignment priority of "Top".**

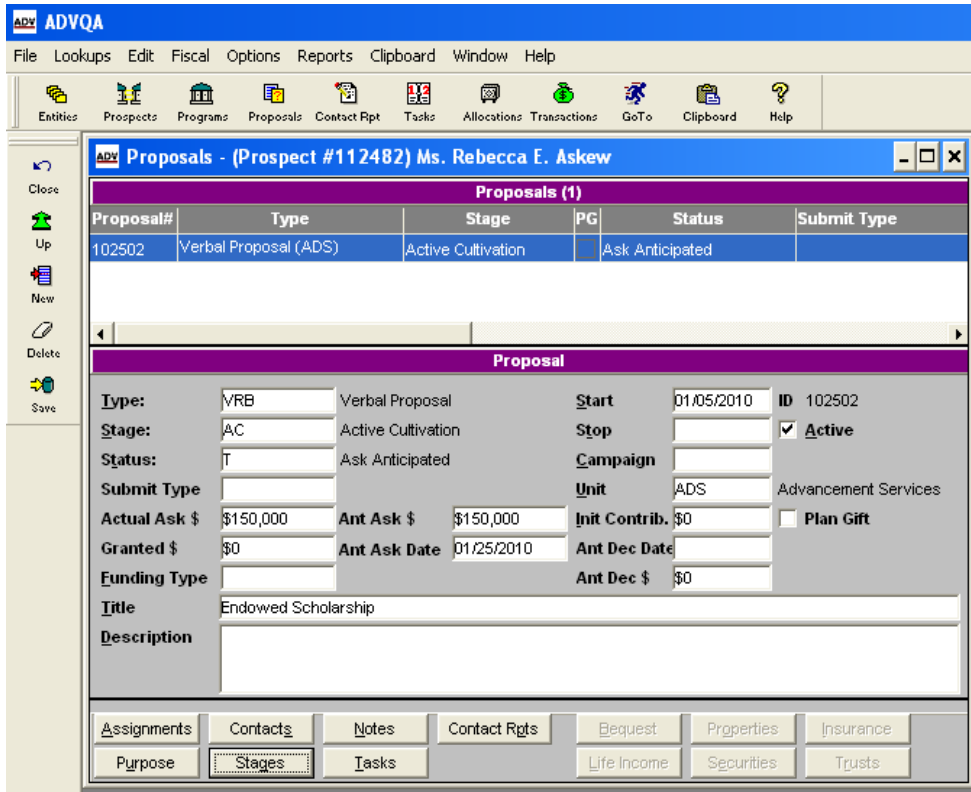
1. Perform an Entity Lookup
2. Drill down in the Prospect Summary section of the Entity Profile to open the Prospect Tracking Summary
3. Double click on blue prospect line under Prospect Information  
Note: If there is no blue line, a prospect record does not exist. You will need to ask Prospect Management staff to create a prospect record and assign you to this prospect.
4. Click on Proposals button at bottom left of window
5. Proposal Window appears
6. Click on New button in left toolbar
7. Fill in the following fields:

Note: Click in the stage and status fields for a dropdown menu. The Stages button at the bottom of the screen is only used for viewing stage history.

<b>Start Date</b>	Date you designated the prospect Top Priority and entered the proposal.
<b>Type</b>	Make choice; requires no update.
<b>Stage</b>	Requires update; see page 3 for corresponding stage and status. <b>PROGRESS TOWARD ASK GOAL IS CALCULATED ON NEGOTIATION STAGE.</b>
<b>Status</b>	Requires update; see page 3 for corresponding stage and status.
<b>Ant Ask \$</b>	On the day the proposal is entered, the amount you expect to ask for. Never updated.
<b>Ant Ask Date</b>	Estimate which quarter of the year the ask will occur in (use last day of the quarter). May be updated.
<b>Actual Ask \$</b>	On the day the proposal is entered, same amount as Ant Ask \$. Update as needed.
<b>Unit</b>	Choose your area.
<b>Title</b>	Type a simple descriptive title. Example: Endowed Scholarship for History Dept.
<b>Description</b>	(optional)

Please do not fill in any other fields at this time.

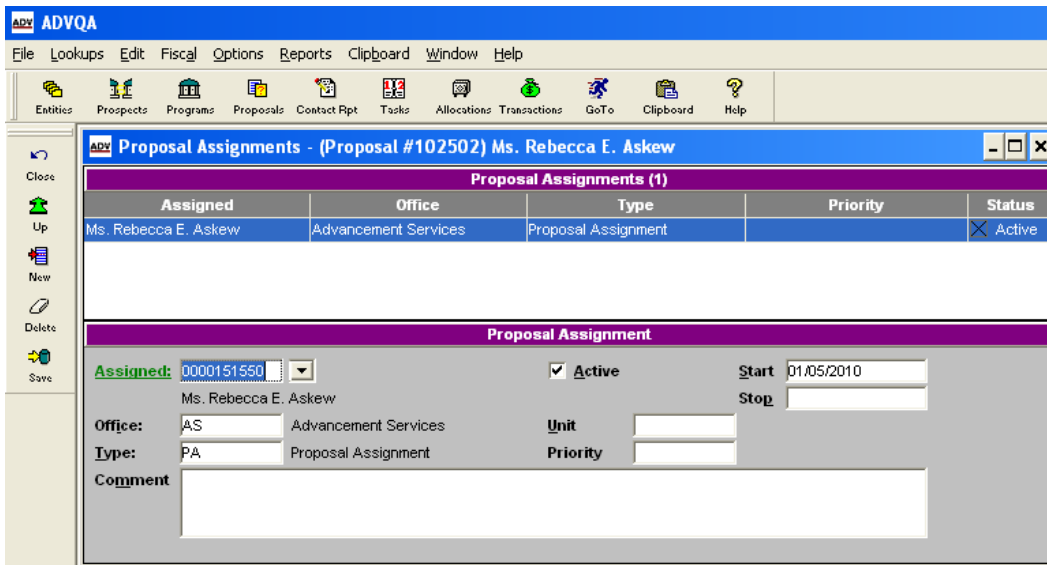
8. Click on Save button in left toolbar



9. Create proposal assignment.

### CREATING A PROPOSAL ASSIGNMENT

1. Click on Assignment button at bottom of a saved proposal
2. Click on New button in left toolbar
3. Fill in the following:
  - Assigned** – Choose your name
  - Office** – Choose your area
  - Type** – Choose PA (Proposal Assignment)
  - Start Date** – Same as proposal start date
4. Click on Save button in left toolbar



## CONTACT REPORTS AND PROPOSALS

On a saved proposal, you may use the Contact Rpts button to add any related contact reports. These will appear in the usual entity attributes and will also appear connected to the proposal.

## CORRESPONDING PROPOSAL STAGE AND STATUS

Status	Required Actions	Stage	Required Action
Ask Anticipated	Start date, Type, Ant Ask \$, Ant Ask Date, Actual Ask \$, Unit, Title, Description (optional), Proposal Assignment entered. Active box checked. →	Active Cultivation  <b>OR</b> Ask Appointment Scheduled	Documented in Advance contact report linked to proposal.

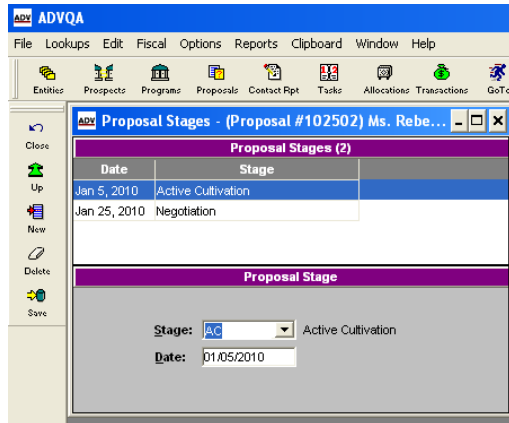
Ask Submitted	Actual Ask \$ updated as needed. Ant Dec Date and Ant Dec \$ entered. →	Negotiation	Documented in Advance contact report linked to proposal. <b>PROGRESS TOWARD ASK GOAL IS CALCULATED ON NEGOTIATION STAGE.</b>
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Approved by Prospect	Granted \$ entered. Stop date entered. Check mark removed from active box. →  <b><u>Gift transmittal or signed pledge form/transmittal submitted with proposal ID included.</u></b>	Planned Gift  <b>OR</b> Outright Gift  <b>OR</b> Pledge  <b>OR</b> Combination	Documented in Advance contact report linked to proposal.
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**OR**

Declined by Prospect	Stop date entered and check mark removed from active box. →	Ask Declined	Documented in Advance contact report linked to proposal.
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## VIEWING STAGE HISTORY



Click on the Stages button at bottom of a saved proposal to view the stage history.

Do not use this window to enter or update proposal stages.

## UPDATING PROPOSALS

### Status of "Ask Submitted" and Stage of "Negotiation"

➤ Update proposal immediately after the ask is made

1. Remember to click in the stage and status fields for a dropdown menu. The Stages button at the bottom of the screen is only used for viewing stage history.
2. Choose **Stage** of Negotiation and **Status** of Ask Submitted.  
**PROGRESS TOWARD ASK GOAL IS CALCULATED ON NEGOTIATION STAGE.**
3. **Actual Ask** – Enter the amount you actually asked for.
4. **Ant Dec Date** – Enter the date you think the prospect will make a gift/pledge or tell you no.
5. **Ant Dec \$** – Enter the amount you think the prospect will give or pledge.
6. Click on Save button in left toolbar.
7. Use Contact Rpts button at the bottom of the window to enter any related contact reports.

## Status “Approved by Prospect” and Stage “Outright Gift Made”

### ➤ Update proposal when Gift Transmittal is sent to Alumni and Donor Records

1. Remember to click in the stage and status fields for a dropdown menu. The Stages button at the bottom of the screen is only used for viewing stage history.
2. Choose **Stage** of Outright Gift Made and **Status** of Approved by Prospect.
3. **Granted \$** – Enter the amount of the gift transmittal.
4. **Stop Date** – Enter the date the gift transmittal was submitted.
5. Remove check mark from the **Active** box.
6. Click on Save button in left toolbar.

The screenshot shows the 'Proposals' window in the ADVQA software. The window title is 'Proposals - (Prospect #112482) Ms. Rebecca E. Askew'. The main area contains a table with the following data:

Proposal#	Type	Stage	PG	Status	Submit Type
102502	Verbal Proposal (ADS)	Outright Gift Made		Approved by Prospect	

Below the table is a detailed form for the selected proposal:

**Proposal**

Type: VRE Verbal Proposal Start: 01/05/2010 ID: 102502  
 Stage: GM Outright Gift Made Stop: 02/05/2010  Active  
 Status: A Approved by Prospect Campaign:   
 Submit Type: Unit: ADS Advancement Services  
 Actual Ask \$: \$175,000 Ant Ask \$: \$150,000 Init Contrib: \$0  Plan Gift  
 Granted \$: \$125,000 Ant Ask Date: 01/25/2010 Ant Dec Date: 01/31/2010  
 Funding Type: Ant Dec \$: \$125,000  
 Title: Endowed Scholarship  
 Description:   
 Assignments, Contacts, Notes, Contact Rpts, Bequest, Properties, Insurance, Purpose, Stages, Tasks, Life Income, Securities, Trusts

7. Use Contact Rpts button at the bottom of the window to enter any related contact reports.
8. Click Assignment button to deactivate the proposal assignment by removing check mark from the **Active** box and entering the same **Stop Date** as the proposal stop date.

The screenshot shows the 'Proposal Assignments' window in the ADVQA software. The window title is 'Proposal Assignments - (Proposal #102502) Ms. Rebecca E. Askew'. The main area contains a table with the following data:

Assigned	Office	Type	Priority	Status
Ms. Rebecca E. Askew	Advancement Services	Proposal Assignment		Active

Below the table is a detailed form for the selected assignment:

**Proposal Assignment**

Assigned: 0000151550  Active Start: 01/05/2010  
 Ms. Rebecca E. Askew Stop: 02/05/2010  
 Office: AS Advancement Services Unit:   
 Type: PA Proposal Assignment Priority:   
 Comment:   
 Assignments, Contacts, Notes, Contact Rpts, Bequest, Properties, Insurance, Purpose, Stages, Tasks, Life Income, Securities, Trusts

## Status “Approved by Prospect” and Stage “Pledge Made”

### ➤ Update proposal when Pledge Transmittal is sent to Alumni and Donor Records

1. Remember to click in the stage and status fields for a dropdown menu. The Stages button at the bottom of the screen is only used for viewing stage history.
2. Choose **Stage** of Pledge Made and **Status** of Approved by Prospect.
3. **Granted \$** – Enter the amount of the pledge transmittal.
4. **Stop Date** – Enter the date the pledge transmittal was submitted.
5. Remove check mark from the **Active** box.
6. Click on Save button in left toolbar.

The screenshot shows the ADVQA software interface. The main window is titled "Proposals - (Prospect #112482) Ms. Rebecca E. Askew". It contains a table with the following data:

Proposal#	Type	Stage	PG	Status	Submit Type
102502	Verbal Proposal (ADS)	Outright Gift Made		Approved by Prospect	

Below the table is a detailed form for the selected proposal (ID 102502):

- Type:** VRB (Verbal Proposal)
- Stage:** PM (Pledge Made)
- Status:** A (Approved by Prospect)
- Submit Type:** (Empty)
- Start:** 01/05/2010
- Stop:** 02/05/2010
- Active:**  (unchecked)
- Actual Ask \$:** \$175,000
- Ant Ask \$:** \$150,000
- Init Contrib.:** \$0
- Plan Gift:**  (unchecked)
- Granted \$:** \$125,000
- Ant Ask Date:** 01/25/2010
- Ant Dec Date:** 01/31/2010
- Ant Dec \$:** \$125,000
- Funding Type:** (Empty)
- Title:** Endowed Scholarship
- Description:** (Empty)

At the bottom of the window, there are several buttons: Assignments, Contacts, Notes, Contact Rpts, Request, Properties, Insurance, Purpose, Stages, Tasks, Life Income, Securities, and Trusts.

7. Use Contact Rpts button at the bottom of the window to enter any related contact reports.
8. Click Assignment button to deactivate the proposal assignment by removing check mark from the **Active** box and entering the same **Stop Date** as the proposal stop date.

The screenshot shows the ADVQA software interface. The main window is titled "Proposal Assignments - (Proposal #102502) Ms. Rebecca E. Askew". It contains a table with the following data:

Assigned	Office	Type	Priority	Status
Ms. Rebecca E. Askew	Advancement Services	Proposal Assignment		Active

Below the table is a detailed form for the selected assignment:

- Assigned:** 0000151550 (Ms. Rebecca E. Askew)
- Active:**  (unchecked)
- Start:** 01/05/2010
- Stop:** 02/05/2010
- Office:** AS (Advancement Services)
- Unit:** (Empty)
- Type:** PA (Proposal Assignment)
- Priority:** (Empty)
- Comment:** (Empty)

## Status “Declined by Prospect” and Stage “Ask Declined”

### ➤ Update proposal immediately after prospect says “no”

1. Remember to click in the stage and status fields for a dropdown menu. The Stages button at the bottom of the screen is only used for viewing stage history.
2. Choose **Stage** of Ask Declined and **Status** of Declined by Prospect.
3. **Granted \$** – Enter \$0.
4. **Stop Date** – Enter the date the prospect said no.
5. Remove check mark from the **Active** box.
6. Click on Save button in left toolbar.

**Proposals (1)**

Proposal#	Type	Stage	PG	Status	Submit Type
102502	Verbal Proposal (ADS)	Outright Gift Made		Approved by Prospect	

**Proposal**

Type: VRB Verbal Proposal Start: 01/05/2010 ID: 102502  
 Stage: AR Ask Declined Stop: 02/05/2010  Active  
 Status: D Declined by Prospect Campaign:   
 Submit Type:   
 Actual Ask \$: \$175,000 Ant Ask \$: \$150,000 Unit: ADS Advancement Services  
 Granted \$: \$0 Ant Ask Date: 01/25/2010 Ant Dec Date: 01/31/2010  
 Ant Dec \$: \$125,000  
 Funding Type:   
 Title: Endowed Scholarship  
 Description:   
 Assignments, Contacts, Notes, Contact Rgts, Bequest, Properties, Insurance, Purpose, Stages, Tasks, Life Income, Securities, Trusts

7. Use Contact Rpts button at the bottom of the window to enter any related contact reports.
8. Click Assignment button to deactivate the proposal assignment by removing check mark from the **Active** box and entering the same **Stop Date** as the proposal stop date.

**Proposal Assignments (1)**

Assigned	Office	Type	Priority	Status
Ms. Rebecca E. Askew	Advancement Services	Proposal Assignment		Active

**Proposal Assignment**

Assigned: 0000151550  Active Start: 01/05/2010  
 Ms. Rebecca E. Askew Stop: 02/05/2010  
 Office: AS Advancement Services Unit:   
 Type: PA Proposal Assignment Priority:   
 Comment:   
 Assignments, Contacts, Notes, Contact Rgts, Bequest, Properties, Insurance, Purpose, Stages, Tasks, Life Income, Securities, Trusts

## PROSPECT LOOKUP TO FIND TOP PROSPECTS

**Prospect Lookup**

File Lookups Edit Fiscal Options Reports Clipboard Window Help

Entities Prospects Programs Proposals Contact Rpt Tasks Allocations Transactions GoTo Clipboard Help

Close

Prospect

Type  Major Prospect  Active

Stage

Stage Range Bottom Top

Expected Date

Major Prosp.

Rating

Group

Classification

Campaign

Affiliation

Committee

Region

Team

Unit

Assignment

Type  Active

Assign. ID 0000151550

Ms. Rebecca E. Askew

Priority Top Prospect

Unit

Program

Program

Year  Active

Unit

Interest

Interest

Unit

Address

City

State Zip

Country

OK

Cancel

Help

Clear

SQL

Title Prospect Lookup

Next Window: 8826 Prospect

## PROPOSAL LOOKUP TO FIND ACTIVE PROPOSALS

**Proposal Lookup**

File Lookups Edit Fiscal Options Reports Clipboard Window Help

Entities Prospects Programs Proposals Contact Rpt Tasks Allocations Transactions GoTo Clipboard Help

Close

Proposal

Type  Active  Planned Gift

Status

Stage

Stage Range Bottom Top

Expected Date

Submit Type

Campaign

Unit

Proposal Purpose

Interest

Purpose

Unit

Assignment

Type Proposal Assignment

Active

Assign. ID 0000151550

Ms. Rebecca E. Askew

Priority

Unit

Prospect

Type  Major Prospect  Active

Major Prosp.

Group

Classification

Campaign

Unit

Program Prospect

Program

Year  Active

Unit

OK

Cancel

Help

Clear

SQL

Title Proposal Lookup

Next Window: 8817 Proposals