

# The University of Georgia Office of Prospect Management Policies and Procedures



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## Prospect Management Policies and Procedures

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## Prospect Management Policies and Procedures

# 1 OVERVIEW OF PROSPECT MANAGEMENT AND CORE FUNDRAISING VALUES

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## 1.1 INTRODUCTION

The goal of the Prospect Management team is to facilitate the development of long-term, meaningful relationships between The University of Georgia and its prospects and donors. With a donor-centric emphasis, the Prospect Management Team partners with fundraisers and their managers to facilitate movement of prospects through the development lifecycle.

## 1.2 CORE VALUES

The prospect management system is built on a shared organizational commitment to the following core values:

**Teamwork:** A fundamental principle of the prospect management program is to foster collaboration and communication among development units across campus. All prospect team members are responsible for communicating and coordinating activity with the other team members, always keeping in mind the best interests of the donor and The University of Georgia.

**Accountability:** The Prospect Management Team will appropriately evaluate the effectiveness of development professionals to ensure that they provide the best possible experience for prospects and donors while meeting or exceeding fundraising goals.

**Transparency:** A transparent prospect management program is essential to the success of the University's fundraising and engagement efforts. It is intended to preserve institutional history and knowledge through contact reports, and this can only be accomplished with the full participation of all staff across the University. It is the responsibility of every staff member to support and/or directly maintain all relevant relationship data in the University's alumni database, GAIL.

## 1.3 PROSPECT MANAGEMENT TEAM RESPONSIBILITIES

The Prospect Management Team provides oversight of prospect development, assignment, and other prospect management related responsibilities. Services offered by the Prospect Management Team include:

- Coordinate a campus-wide prospect management system
- Initiate quarterly portfolio reviews with Major Gift Officers
- Collaborate with Principal Gifts Team in managing University Top Prospects
- Provide routine portfolio clean-up and maintenance assistance to Major Gift Officers
- Provide portfolio maintenance assistance to Leadership and Stewardship Officers as requested
- Monitor Major Giving Plan activity in GAIL to ensure proper prospect movement through the pipeline
- Monitor and review clearance requests in GAIL
- Review Meeting interactions entered into GAIL to ensure data integrity
- Assign Suspect Referral Plans based on accepted Research referrals
- Create reports and provide analytics support concerning prospect management and research functions
- Provide support to fundraisers regarding Prospect Management policy and GAIL database processes

## 2 PORTFOLIOS

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A Development Officer's portfolio consists of every prospect to which they are attached in the following roles: prospect manager, primary plan manager, secondary plan manager and/or secondary solicitor (3.1). Each Development Officer is expected to know the prospects that are in their portfolio at all times and to manage prospects according to supervisor instructions.

To assist fundraisers in achieving an effective and healthy balance in their portfolios, the Prospect Management Team members make themselves available on an as-requested basis to any Development Officer and also conduct scheduled portfolio reviews with development directors. Major Gift Officers reporting to a Director of Development will also attend scheduled portfolio reviews with their Director and the Prospect Management Team to ensure that all Major Gift Officer portfolios are balanced appropriately.

### 2.1 PORTFOLIO SIZE AND DISTRIBUTION

Prospect Management recognizes that factors such as Development Officer role and tenure, as well as campaign progress, may affect portfolio size and distribution. In general, DAR Leadership has instructed that the number of prospects in a Major Gift Officer's portfolio should be in the 75-125 range and prospect plans should illustrate a healthy balance of prospects in the pipeline in each stage: qualification, cultivation, solicitation, and stewardship. Major Gift Officers should work with their supervisors and Prospect Management Liaison to determine individual portfolio size and distribution goals.

**Note:** If you are a Major Gift Officer that also happens to manage a team of Development Officers, your portfolio size could possibly be smaller.

### 2.2 LOCATING YOUR PROSPECTS IN GAIL

A Prospect Management Liaison will provide each Major Gift Officer with a listing of their current portfolio assignments both monthly and upon request. Development Officers may also access prospect assignment lists in GAIL at any time using one of the following methods:

#### 2.2.1 My Fundraiser Page

A Development Officer's current prospects and plans can be found through the My Fundraiser Page in GAIL. By referring to the "Prospects and Plans" tab, a Development Officer can find a comprehensive list of all plans they are associated with, as well as a list of all prospects that the Development Officer is currently cleared to manage as Prospect Manager (12.1).

#### 2.2.2 "Prospects of" Groups

Development Officers can access a list of the constituents in their prospect list by using the search function to search for "prospects of (Development Officer name)." This group includes any prospects that the Development Officer manages, any prospects with plans by that Development Officer, and any participants on plans by that Development Officer. The group updates automatically every night in GAIL to add in any new prospects that have been assigned that day (12.10.1).

Additionally, a Development Officer may choose to manually add prospects to this group. This allows the Development Officer to manually select any prospect they would like to keep track of (previous prospects

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whose plans have been made historical but may still need to be involved with the school, board or committee members, etc.) (12.10.2 and 12.10.3).

**Note:** The Members count on the “Prospects of” Group will rarely match the Assigned Prospects number due to manual additions to the group and the fact that plan participants are also included.

### 2.3 PORTFOLIO TRANSITION

As Major Gift Officers leave the University or transition into new roles at UGA, they will be required to meet with their Director and Prospect Management Liaison to determine a plan of action for transitioning the portfolio. During this meeting, each individual prospect will be reviewed and either be kept in a vacancy portfolio, reassigned to another team member, or dropped. Prospect Management will make these changes as soon as the Development Officer has vacated their role.

**Note:** Plans will not be transferred between Development Officers unless an exception has been made by their Senior Director and/or Leadership. Transferred prospects will have original plan made historical and the new Development Officer will create a new plan.

### 2.4 PROSPECT CONSTITUENCY

In order for a fundraiser to add a constituent to a portfolio, the record must first be assigned the Prospect Constituency (12.12).

### 2.5 PROSPECT STATUS

There is a “Prospect Status” tile on each record with a Prospect constituency. Prospect Status will be used by the Prospect Management team to flag prospects as one of the following:

1. Principal Gift Prospect:  
This prospect has the affinity and/or capacity to give a Principal Gift of at least \$1M.
2. Not a Principal Gift Prospect: This prospect does not have the affinity and/or capacity to give a gift of at least \$1M, but could give a Major Gift between \$25,000 and \$1M.
3. Not a Major Gift Prospect: This prospect does not have the affinity and/or capacity to give a Major Gift or a Principal Gift, but may give a Leadership Gift.
4. Not a Prospect: This constituent is not likely to give a gift of any size to any area of UGA.

These statuses will only be applied in situations that are university-wide. A justification and length of time (if applicable) should be provided before requesting a prospect status be applied. Prospect Management will record the status as an interaction using a standard naming convention (e.g., PM – Not a Major Gift Prospect).

Prospect status will not be utilized to flag a prospect for a school, college, or unit. Should a prospect status be needed, a justification and length of time for the status (if applicable) should be submitted. Prospect Management will record the status as an interaction using a specific school, college, or unit naming convention (e.g., PM – SPIA – Not a Major Gift Prospect).

## 2.6 PORTFOLIO RATINGS

### 2.6.1 D.O. Estimated 5-Year Giving Potential

The D.O. Estimated 5-Year Giving Potential is a best guess estimated from a Development Officer's point of view on how much they feel their prospect is capable of giving to the University of Georgia as a whole over the next five years.

**Note:** Each Development Officer should have a separate rating regardless of role on plan (i.e. Primary Manager and Secondary Manager and Secondary Solicitors all should have their own rating listed on a prospect's portfolio rating tab).

**Note:** This estimate should include Athletic giving but exclude any Planned Giving estimated.

### 2.6.2 D.O. Estimated Lifetime Giving Potential

The D.O. Estimated Lifetime Giving Potential is a best guess estimated from a Development Officer's point of view on how much they feel their prospect is capable of giving to the University of Georgia as a whole over the prospects lifetime of (intended) giving.

**Note:** Each Development Officer should have a separate rating regardless of role on plan (i.e. Primary Manager and Secondary Manager and Secondary Solicitors all should have their own rating listed on a prospect's portfolio rating tab).

**Note:** This estimate should include both Athletic giving and estate gifts.

### 2.6.3 Planned Giving Indicator

This portfolio rating is an indicator of interest in planned giving based off data received from surveys.

- PG1 – estate work done but not documented
- PG2 – actively working on it with us or their advisor
- PG3 – they plan on doing this in the future
- PG4 – open to the concept but no guarantee

**Note:** Most people currently marked PG2 are donors who have let us know we are in their estate plans but have not worked with us to document it.

### 2.6.4 Top 10

This portfolio rating is used to capture a Major Gift Officer's list of their top 10 prospects in their current portfolio. This list is determined at the discretion of the Major Gift Officer and their supervisor. Prospect Management can offer supporting data entry if requested (12.8).

**Note:** These prospects will only be updated at the beginning of each new fiscal year and one prospect could be in multiple Top 10 lists.

## 3 FUNDRAISER ROLES

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### 3.1 OVERVIEW OF FUNDRAISER ROLES

Frequently, more than one area of the University may have a relationship with the same prospect or a prospect may have interests in multiple areas of the University. Therefore, the prospect team may include development staff team members from multiple areas of campus working actively on cultivation strategies with any given prospect. Each of these staff members will be listed as a “Team Member” on the “Prospect Team” subtab of a prospect’s record.

#### 3.1.1 Prospect Manager

The Prospect Manager has the ultimate responsibility to care for and develop the overall relationship between the prospect and the University. At all times, the Prospect Manager must take into account the prospect’s wishes and the overall strategies and needs of the University.

To that end, the Prospect Manager must:

1. Read all contact reports, notes, and tasks on a regular basis for those prospects for whom they are Prospect Manager
2. Keep the lines of communication open with all fundraisers and other staff who work with the prospect
3. See that all relevant information regarding the prospect and all activities related to the prospect are recorded in GAIL
4. Decide, in the best interest of the prospect and the University, which solicitations should be pursued and when; keeping the pipeline moving while ensuring that solicitations are in the prospect’s best interest
5. Reach out to all interested parties to create a UGA-wide strategy on the prospect

**Note:** There can be only one Prospect Manager per prospect.

#### 3.1.2 Primary Manager

The Primary Manager (also known as Plan Manager) is responsible for managing a specific fundraising plan on a prospect. The duties of a Primary Manager include:

1. Develop a narrative that explains the purpose behind the specific fundraising plan
2. Record all steps associated with the plan
3. Update plan information as often as necessary
4. Coordinate efforts with other team members to ensure a donor-centric approach
5. Maintain open communication with the Prospect Manager, if applicable

**Note:** There will be only one Primary Manager per Plan. However, there may be multiple plans (and therefore multiple Primary Managers) on a single prospect.

#### 3.1.3 Secondary Manager

The Secondary Manager will be responsible for supporting the efforts of the Primary Manager for a specific fundraising plan. The Secondary Manager role should be limited to active Major Gift, Leadership Annual Giving, or Stewardship Officers from the Central Development office or a school, college, unit or department.

**Note:** There can only be one Secondary Manager per Plan.

### **3.1.4 Secondary Solicitors**

The Secondary Solicitor role should be used if there are additional fundraisers assisting the Primary and Secondary Managers with a specific fundraising plan or if there are other influential or advisory parties, such as a Dean or Professor, involved in the solicitation of a prospect (12.23).

**Note:** There may be multiple Secondary Solicitors per Plan. Secondary Solicitors must have the “Fundraiser” constituency in GAIL to be added to a plan as a Secondary Solicitor.

## **3.2 BECOMING PROSPECT MANAGER ON AN INDIVIDUAL**

When a Development Officer wishes to become the Prospect Manager for a prospect or donor, they must submit a clearance request through GAIL if no current Prospect Manager exists. Requests must be made through the “Add Clearance Request” feature on the prospect’s GAIL record. Once submitted, individual clearance requests are evaluated by the Prospect Management Team as well as DAR Leadership (12.11).

**Note:** Prospect Manager status should only be requested when there are multiple interests across different areas and/or there is high sensitivity regarding the placement of additional plans on a major gift or principal gift prospect, VIP, etc.

### **3.2.1 Criteria for Becoming Prospect Manager**

Generally, clearance will only be granted when the following conditions have been met:

1. A face-to-face personal meeting has taken place prior to submitting a clearance request
2. The requesting fundraiser has an active Major Giving or Campaign Principal Gift Plan in place that is in cultivation or solicitation
3. An active Opportunity exists with the required Expected Ask Date, Expected Ask Amount, and Likelihood.
4. A pending strategic next step is already noted in the plan
5. A clear strategy has been outlined in the plan narrative. A written strategy for all major gift prospective donors must have concrete, measurable, and strategic steps. The strategy must contain who is involved in the gift ask and what initiative the gift ask pertains to

### **3.2.2 Accepted Clearance Requests**

If a clearance request is accepted, the requestor will be notified via an automated GAIL email. The requesting Development Officer will then assume all responsibilities of the Prospect Manager role as outlined above (3.1.1).

### **3.2.3 Rejected Clearance Requests**

If a clearance request is rejected, the requestor will be notified via an automated GAIL email. This email will include the reason for the denial and any specific instructions from the Prospect Management Team regarding how to move forward with that particular prospect.

**Note:** In most cases, it is more conducive to be a Primary Manager of a fundraising plan than a Prospect Manager for all University relationships.

## **3.3 BECOMING PROSPECT MANAGER ON A CORPORATION OR FOUNDATION**

Development Officers will rarely need to become the Prospect Manager on corporation or foundation prospects, as the Corporate and Foundation Relations team will generally manage these relationships. In most



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cases, being Primary Manager on a Major Giving Plan will suffice. When entering plans on corporations or foundations, the Development Officer should always reach out to his or her Corporate and Foundation Relations Liaison to ensure that the correct approach is taken.

However, if a Development Officer feels strongly that he or she should be Prospect Manager of a corporation or foundation, a clearance request should be submitted through the GAIL clearance request form. All corporation and foundation clearance requests will be reviewed by the Prospect Management Team as well as the Executive Director of Corporate and Foundation Relations.

### **3.4 CLEARANCE ON SPOUSES / PARTNERS**

Prospect Management's policy is that a Development Officer should only have clearance on one spouse/partner in a household. Spouses and Partners should always be listed as a "Plan Participant" where appropriate (5.7). Limited exceptions to this policy will be made at the direction of DAR Leadership.

### **3.5 EXCEPTIONS TO CLEARANCE REQUEST REQUIREMENTS**

The Prospect Management Team reserves the right to shift Prospect Manager assignments to the Principal Gifts Team and the Vice President for Development and Alumni Relations, as directed by DAR Leadership.

### **3.6 TRANSFERRING PROSPECT MANAGER STATUS**

As a prospect's relationship with UGA progresses, it may become necessary to transfer Prospect Manager status from one Development Officer to another to move the relationship forward in a meaningful way. In these cases, the existing Development Officer must contact the Prospect Management Team to request such a change. All transfer requests should be submitted via email to the requestor's Prospect Management Liaison for review.

#### **3.6.1 Transfers Within a Team**

If a Development Officer wishes to transfer Prospect Manager status to another Major Gift Officer within the same unit, Prospect Management will generally be able to facilitate these changes within 24 hours. However, Prospect Manager transfers will be subject to the same criteria for new Prospect Manager requests, as previously outlined (3.1.1).

#### **3.6.2 Transfers Outside of a Team**

If a Development Officer wishes to transfer Prospect Manager status to another Major Gift Officer outside of his or her team, Prospect Management will generally review these requests within one week. Prospect Management will take a donor-centric approach when reviewing such requests and will consult with DAR Leadership as necessary. However, Prospect Manager transfers will be subject to the same criteria for new Prospect Manager requests, as previously outlined (3.1.1).

### **3.7 REMOVING PROSPECT MANAGER STATUS**

If a Development Officer wishes to remove existing Prospect Manager status, a request must be submitted to their Prospect Management Liaison via email. The email should contain the prospect's GAIL ID number, directions to drop Prospect Manager status, and instructions on how to handle any active plans on the record by the requesting Development Officer (e.g., "Please leave my existing Major Giving Plan in place" or "Please make all plans for which I am Primary Manager historical.")

### **3.8 12 MONTH SUNSETTING RULE FOR PROSPECT MANAGER STATUS**

The Prospect Management Team will review the interaction activity of Development Officers to ensure all prospects in active management experience at least one meaningful interaction per year. If no significant interactions have occurred, the Development Officer is at risk to have their Prospect Manager role revoked. The Prospect Management Team will present reports periodically concerning Prospect Manager status activity to DAR Leadership, who will enforce this rule as necessary.

**Note:** A meaningful interaction is one of: email, phone, initial or return meeting.

### **3.9 PLANS WITH REVENUE COMMITTED**

The Prospect Management Team will follow up with the Primary Plan Manager and Secondary Plan Manager when revenue has been associated with an opportunity on one of their plans. The plan will be made historical within a 30 days of the revenue being committed. If the Development Officer(s) plans to continue to solicit for another gift, a new Major Giving Plan should be started with the initial steps to be in stewardship until they are ready to move into Qualification or Cultivation.

If the Development Officer(s) is ready to remove the prospect from their portfolio they can pass the prospect on to their Stewardship Officer or enter a general interaction on the prospect page and/or place the prospect in their 'Prospects of' group to receive email notifications.

## **4 TYPES OF PROSPECT PLANS**

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### **4.1 OVERVIEW OF PROSPECT PLAN TYPES**

A plan serves as a transparent and documented strategy for a Development Officer to achieve a specific fundraising objective with a prospect. It contains all of the important information concerning a potential gift and lays out the steps that a Development Officer will take to qualify, cultivate, solicit, and steward a prospect for a specific gift. A plan's purpose is to provide a transparent record of a Development Officer's intentions with a prospect and should be entered as soon as that objective is identified. GAIL provides several plan types for Development Officers to utilize based on desired development outcomes (12.13).

**Note:** For a plan to be added to a prospect's record in GAIL, the constituent must first be identified in the system as a Prospect. If the Prospect constituency and Prospect tab do not appear on a record, the Development Officer may add the constituency code (12.12).

#### **4.1.1 Major Giving Plan**

A Major Giving Plan in GAIL provides documented strategy to cultivate and solicit a major gift of at least \$25,000 from a prospect.

**Note:** An Opportunity is required on a Major Giving Plan once the plan enters the cultivation or solicitation stage.

## Prospect Management Policies and Procedures

### **4.1.2 Leadership Annual Gift Plan**

A Leadership Annual Gift Plan in GAIL provides a documented strategy to cultivate and solicit a meaningful annual gift of \$1,000 or more from a prospect within the current fiscal year. A Leadership Annual Giving Plan should be entered if the gift is repeatable and there is a clear fundraising strategy in place.

**Note:** An Opportunity is required on a Leadership Annual Gift Plan once the plan enters the cultivation or solicitation stage.

### **4.1.3 Stewardship Plan**

A Stewardship Plan in GAIL provides a documented strategy to steward a donor's major or principal gift and should be used when the donor is not expected to immediately move into cultivation for the next gift. Stewardship Plans should be used for major gift donors with potential for continued giving. Stewardship Plans are appropriate to establish following a major gift when the donor is not expected to make an additional major gift within the next 3-5 years, but is likely to make another gift in the future.

**Note:** An Opportunity is not required on a Stewardship Plan.

### **4.1.4 UGA Alumni Association**

UGA Alumni Association plans are for engagement purposes only and should only be used by the Office of Alumni Association.

**Note:** UGA Alumni Association plans should never have an opportunity since they are engagement plans only.

## 4.2 SUSPECT REFERRAL PLANS

After a Development Officer accepts a referral in GAIL from Research, Prospect Management will enter a Major Gift Plan in Qualification on the prospect's record. When entered by Prospect Management, Major Gift Plans will be titled "(site naming convention) – Suspect Referral Plan" and contain 4 steps:

Due Date	Step
60 days after plan start date	Prospect Management Review – Outreach?
60 days after plan start date	Initial Outreach
150 days after plan start date	Introductory Meeting
150 days after the plan start date	Prospect Management Review – Meeting?
150 days after the plan start date	Prospect Management Review – Make Historical if no Meeting

**Note:** If accurate information for two different contact methods is not available, please contact the referring Development Analyst to ask for alternative contact information.

### 4.2.1 Principal Gift Suspect Referral Plans

If any Development Officer accepts a referral for a suspect with a Research Estimated Giving Capacity over \$1M, the resulting Suspect Referral Plan will be titled "(site naming convention) – Principal Gift Suspect Referral Plan." This naming method ensures that these plans are easily identifiable for tracking purposes.

### 4.2.2 What to Do After a Suspect Has Been Qualified/Disqualified

The Development Officer is expected to qualify the prospect within 150 days of the plan's start date. If the Development Officer disqualifies the referral, the a step should be completed with details as to why this prospect is not a viable major gift prospect and then make the plan historical. Once the plan is made historical the Development Officer's Prospect Management Liaison should be notified via email.

- Outreach attempt must happen within the first 60 days from the plan start date or risk having the plan made historical.
- Initial meeting should happen within the first 150 days from the plan start date or risk having the plan made historical.

### 4.2.3 Overdue Suspect Referral Plans

If no outreach attempts have been made within 60 days of the plan's start date, Prospect Management may choose to make the Suspect Referral Plan historical and reassign the referral to a different Development Officer.

### 4.2.4 Requesting Extensions on Suspect Referral Plans

Extensions on Suspect Referral Plans will only be made with the approval of the Development Officer's Prospect Management Liaison and Development Officer's supervisor.

## 5 COMPONENTS OF PROSPECT PLANS

### 5.1 PROSPECT PLAN NARRATIVE

A plan narrative should provide an overview of key cultivation and solicitation components which will lead to a gift that serves both the University and the donor's interests. All plans are required to have a narrative when entered into GAIL, and this narrative should be updated as the plan progresses (A). When developing a thorough narrative, the fundraiser may include the following:

Strategy statement	Include information about the prospect's area of interest and any specific programs or funds that may benefit from a gift; will this be a one-time gift, or do you anticipate it being a part of a larger fundraising strategy for this prospect?
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### 5.2 PROSPECT PLAN STEPS

Steps are part of a transparent and documented plan strategy that should be used to indicate the actions anticipated to move a prospect closer to making a gift. There should be a minimum of 2-3 next pending steps on a plan. Not only do steps help fundraisers monitor their progress toward a goal, but they are also an important tool for tracking institutional history with a prospect (12.15). Important components of steps are:

Objective	The Objective should be used for a brief description of the desired outcome of the step. It should answer the question "What is the purpose of this contact and/or what do I hope to accomplish?"
Owner	The step Owner should be the staff member responsible for the activity. Often, this will be the Primary Plan Manager, but it could also be the Secondary Manager or a Solicitor on the plan.
Status	<p><b>Pending:</b> Use this for the step you plan to complete NEXT. A pending step triggers the stage of the plan, which signals where the prospect is in the development lifecycle. Pending steps will show on a Development Officer's "to do" task list.</p> <p><b>Planned:</b> Use this for any steps that you plan to complete beyond your next pending step. Planned steps do not show on Development Officer task lists until marked "pending."</p> <p><b>Completed:</b> After you have completed a step, make sure to change its status to "completed."</p>
Contact Method	Type of contact (Initial Meeting, Email, Event, etc.)
Stage	Stage of prospect in prospect lifecycle (Qualification, Cultivation, Solicitation, or Stewardship)

**Note:** Planned steps change status to "Pending" only when filing a contact report by manually editing the steps within a plan. This can be done by either editing the step information on a single step within the plan (12.19.1) or by utilizing the "Edit next step" section (12.19.3) when filing a contact report.

### 5.3 THIS WILL INCLUDE A PLANNED GIFT DISCUSSION

This is not a required field. The “This will include a planned gift discussion” check box will be used to indicate when a prospect has an interest in discussing planned giving. This will be used to help Gift and Estate Planning to know which prospects and Development Officers might need assistance.

**Note:** This doesn’t indicate that this plan/opportunity is a planned gift.

### 5.4 SITE

This is a required field. Site is the School/College/Unit what will be benefiting and/or working on this plan. When the plan is being created, only one site can be entered. Once a plan is created, additional sites can be added.

Note: There can be multiple sites on a plan (i.e. Journalism, Development and Alumni Relations <---Unit Development Officer and a Regional Major Gift Officer)

### 5.5 PROSPECT PLAN STAGES

Plan stages designate milestones in a prospect’s relationship with UGA that move the prospect toward making a gift. Prospects will generally move through all stages of the development lifecycle, though it is common that a prospect may skip between stage depending on how the plan advances. Plan stages are based on a plan’s current pending step or the last completed step, if no pending step is available.

The following chart provides some guidelines on the expected time limits for each stage in a typical Major Giving Plan. These time limits are general guidelines based on industry standards, and it is expected that there will be exceptions. Variations may occur based on the type of gift, the type of prospect, or the prospect’s personal giving history to UGA.

## Prospect Management Policies and Procedures

Stage	Duration	
<b>5.5.1 Qualification</b>	5 months	During this stage, a Development Officer will generally have at least one face-to-face meeting with a prospect to determine interest and affinity, as well as to determine some level of capacity to make a major gift. Once the prospect has exhibited interest in and capacity for making a major gift, the plan can move into Cultivation. If those factors are not present, the Development Officer may either decide to focus on an annual giving strategy or “cut bait” and make the plan historical.
<b>5.5.2 Cultivation</b>	18 months	During this stage, a Development Officer will have multiple meaningful contacts (meeting, event contact, email, phone call, etc.) to move the prospect toward making a major gift. A qualified Opportunity should be added to the plan during this stage if one does not already exist. Once a Development Officer has had conversations with a prospect regarding specific interests to support as well as timing for the gift, the plan can move into Solicitation.
<b>5.5.3 Solicitation</b>	6 months	During this stage, a Development Officer will make an ask and/or submit a proposal for the prospect’s consideration. The plan will remain in Solicitation until the prospect has either accepted or rejected the ask. After a response has been made to an ask or proposal submitted by the Development Officer, the plan can advance: <ul style="list-style-type: none"> <li>• if the ask was accepted, the plan can move into Stewardship if needed.</li> <li>• if the ask was rejected, the plan should either be made historical or move back into Cultivation if appropriate.</li> </ul> <b>Note:</b> Plans should not be made historical until all revenue, including matching gifts, have been committed.
<b>5.5.4 Stewardship</b>	12 months to 3 years	During this stage, a Development Officer will steward a prospect’s gift by ensuring that they are properly thanked and kept updated on the impact of their gift. Approximately 30 days after revenue is associated, the Development Officer should review the plan and determine next steps: <ul style="list-style-type: none"> <li>• make the plan historical and start a new Major Gift Plan in appropriate stage with a future opportunity OR make the plan historical and add prospect to ‘Prospect Of’ group.</li> </ul>

### 5.6 PLANNED STEPS VS. PENDING STEPS

Each plan should have (at minimum) one pending step, which triggers the plan stage. A plan’s pending step is imminent- it is scheduled to be the very next move that progresses a plan toward the gift.

Any steps in the future beyond the plan’s pending step can have either a pending or planned status. This means that the Development Officer has already established this action as a way to move the plan forward, but the step is not imminent.

## Prospect Management Policies and Procedures

**Note:** Planned steps need to be manually changed once a pending step has been completed. If filing a contact report, the “Edit next step information” field may be used to simplify the process.

### 5.7 PLAN PARTICIPANTS

Plans are entered on individual records in GAIL, but Development Officers will often cultivate and solicit more than one entity as a part of the overall fundraising strategy (e.g. a husband and wife, or an individual closely connected to a funding organization). In these cases, the Plan Participant field should be used.

Plan Participants are those individuals who are closely linked to a prospect, such as spouses, children, family foundations, etc. A plan should include any family members and family foundations which are considered to be significant to UGA’s relationship with a prospect. Partners/Spouses should be included as Plan Participants so that it is clear on both records that this couple is a prospect without the necessity of creating a plan for each spouse. Plan participants should not be confused with Team Members or Solicitors, which will always be UGA personnel or volunteers (12.22).

## 6 OPPORTUNITIES

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Opportunities serve as documented and quantifiable fundraising goals connected with a plan. There are several important pieces of information housed within an Opportunity that provide a clear and transparent picture of a Development Officer’s plans for an ask.

### 6.1 WHEN TO ADD AN OPPORTUNITY

When a fundraiser determines through qualification that an ask should occur, a qualified Opportunity should be entered in GAIL (12.25). Note that all qualified, response pending, and accepted Opportunities are included in development pipeline reports. Opportunities are not required for plans in Qualification stage but are required as soon as a plan advances to the Cultivation or Solicitation stage. The Ask Amount, Timing, Designation, and Likelihood indeed may be “guess work” until the plan moves forward – but having an Opportunity documented on the plan is essential. The Opportunity variables are expected to evolve as a plan progresses.

**Note:** Opportunities must be entered BEFORE a gift is received. If a gift comes in before a Development Officer enters a plan and Opportunity, they will not receive solicitor credit for that gift. Limited exceptions to this policy will be given at the discretion of the Development Officer’s supervisor.



## 6.2 COMPONENTS OF AN OPPORTUNITY

### 6.2.1 Status

The Opportunity status is an important tool in transparently tracking the progress of an “Ask.” It is important for Development Officers to update this field as plans progress, as an “Accepted” status on an Opportunity is what will signify Gift Accounting that the incoming revenue will need to be associated with that specific Opportunity.

Opportunity Status is fluid and can change. Revenue credit is not given until Revenue has been committed.

<b>Qualified*</b>	A qualified Opportunity is one where the “Expected Ask Amount” is known (or at least estimated), whether or not the potential designation is known. An “Expected Ask Date”, a “Likelihood”, and “Anticipated Fiscal Year to Close” are also required to be entered on qualified opportunities.
<b>Response Pending*</b>	Once an “Ask” has been submitted to the donor, this status should be used. An “Ask Date” and “Ask Amount” are required at this time. The “Likelihood” and “Anticipated Fiscal Year to Close” should be updated.
<b>Accepted*</b>	Once written or verbal confirmation of a specific gift has been received from the donor, this status should be used. The “Accepted Amount” and “Response Date” are required at this time.
<b>Rejected</b>	This status should be used if a prospect responds negatively to an ask or proposal. A “Response Date” will be required when changing the Opportunity status to “Rejected.”
<b>Canceled</b>	This status should be used when a donor has become unresponsive after a considerable amount of time, and a Development Officer is sent “back to the drawing board.” No “Response Date” is required for canceled opportunities.
<b>Unqualified</b>	This status should never be used, since opportunities on plans are not required until a prospect has been properly qualified.

*\*Included in pipeline reporting*

### 6.2.2 Opportunity Type

This field contains a drop-down menu of gift type options and may be updated as plans progress.

**Note:** Recurring Gift opportunity types will NOT be included in pipeline reporting since recurring gift revenue cannot be associated to a plan. Solicitor credit can still be received once the recurring gift has been established in the system. Development Officers should contact their Prospect Management Liaison to received solicitor credit, when applicable.

## Prospect Management Policies and Procedures

### 6.2.3 Expected Ask Amount

An “Expected Ask Amount” is used as a Development Officer’s best estimate of the amount of a planned ask. This amount generally should be entered after a prospect has been satisfactorily qualified for a gift, and may be updated as plans progress. An “Expected Ask Amount” is required once a plan reaches Cultivation or Solicitation stage.

**Note:** UGA Alumni Association and Stewardship Plans do not include opportunities.

Plan Type	Minimum Expected Ask Amount	
Leadership Annual	<b><i>\$1,000</i></b>	When soliciting a Leadership Annual Gift, \$1,000 is the suggested minimum opportunity amount that should be entered.
Major	<b><i>\$25,000</i></b>	The minimum threshold for a Major Gift at The University of Georgia is \$25,000. All plans with expected ask amounts below \$25,000 should be entered as Leadership Annual Gift Plans, exceptions can be made.

### 6.2.4 Expected Ask Date

The “Expected Ask Date” is required for all opportunities and should be used for pipeline planning purposes to provide an accurate and transparent estimate of when a Development Officer expects to ask a prospect for a specific gift. This should always be entered as a Development Officer’s best guess of when the ask will be made and then updated periodically as plans or circumstances change.

### 6.2.5 Anticipated Fiscal Year to Close

The “Anticipated Fiscal Year to Close” is required for all opportunities that are in the statuses of: Qualified, Response Pending, and Accepted. This drop down box is used to indicate the fiscal year in which the Development Officer thinks the gift will be received and committed (i.e. closed). This is different from the “Expected Ask Date” and “Ask Date” because it gives DAR Leadership an idea of when to expect to be able to count the gift in giving totals. This should always be entered as a Development Officer’s best guess of when the gift will close (i.e. revenue received and committed) and then updated periodically as plans or circumstances change.

**Note:** “Anticipated Fiscal Year to Close” should never be in a fiscal year prior to an “Expected Ask Date” or “Ask Date”.

### 6.2.6 Ask Amount

The “Ask Amount” should be filled in once the ask is actually completed. The “Ask Amount” may be different from the “Expected Ask Amount,” depending on the Development Officer’s discretion.

### 6.2.7 Ask Date

The “Ask Date” should be entered as the actual date that the ask took place. It is required once an “Ask Amount” is entered.

## Prospect Management Policies and Procedures

### 6.2.8 Likelihood

The “Likelihood” field is required for all opportunities to prioritize needed fundraiser activity and to provide an estimate of the Development Officer’s confidence level of an ask being accepted.

None (0%)	Interest has not been assigned
Low (25%)	Interest is unclear and/or priorities have changed
Medium (50%)	Confirmed interest, non-committal on amount/timing
Strong (75%)	High confidence of commitment, date or amount in question
Definite (100%)	Highest confidence of commitment level and date

### 6.2.9 Opportunity Designation

**After** the Ask is made and if known, a Development Officer should enter the specific designation for the opportunity in this field. The Amount field must match the Ask Amount.

**Note:** This field is not required and can only be accessed when editing an opportunity.

### 6.2.10 Opportunity Comments

An “Opportunity Comment” is not required; however, the Primary Plan Manager may wish to include additional information concerning the ask or any details on how the gift may be designated. This is not included as a Step in a plan and is only visible when looking at the Opportunity tab within the plan.

## 6.3 SINGLE OPPORTUNITY VS. MULTIPLE OPPORTUNITIES

The Prospect Management Team prefers that a Development Officers enter only one opportunity per Major Giving Plan. This does not include Leadership Annual Gift Officers and their corresponding plans.

**Note:** Opportunities are only required for Leadership Annual Gift and Major Gift Plans in Cultivation or Solicitation.

## 6.4 MATCHING GIFTS

If a Development Officer anticipates that a prospect’s gift will be matched by an employer, the Development Officer may add that match amount to the opportunity (e.g. a \$50,000 ask will also be matched by the prospect’s employer at \$50,000, so the Expected Ask Amount would be \$100,000).

**Note:** It is helpful (but not required) to include an opportunity comment when a match is included in the Expected Ask Amount or Ask Amount.

## 7 INTERACTIONS

Interactions serve as a way to transparently track the University's contact with its constituents. By entering interactions into GAIL, Development Officers are not only providing important information to other Development Officers, but also preserving institutional history with that specific constituent (12.27).

### 7.1 MEETING CONTACT METHODS

A "Meeting" is a contact with a prospect that represents a meaningful interpersonal effort to further engage the prospect or move the gift conversation forward. A fundraiser's "Meeting" record in GAIL should clearly convey a face-to-face meeting with a donor or prospect that involves a meaningful and strategic discussion about engagement, partnering, and/or their individual giving. An "Initial Meeting" or "Return Meeting" should only be entered as such if the meeting was a **scheduled, face-to-face meeting to talk about engagement, partnering, and/or a specific gift or fundraising plan.**

When entering a "Meeting" in GAIL, the following pieces of information are required in order for it to be counted in a Development Officer's monthly meeting totals (12.30).

Please see [FAQs](#) for answers to common questions about Meetings.

<b>Location</b>	The location should be as specific as possible – "John Doe's office at Chick-fil-a headquarters in Atlanta, GA."
<b>Purpose</b>	The purpose can range from a general description (such as: "To determine John Doe's affinity and capacity to make a major gift to UGA") to a more specific purpose (such as: "To meet with John Doe and his lawyer to determine the specific wording of John's bequest to the College of Education.")
<b>Summary</b>	The summary should mention all relevant information discussed during the meeting that is pertinent to the engagement or expected gift including: the prospect's ability or inclination to make the gift, any details concerning the prospect's relationship with UGA, and any important personal or biographical details (such as: children and info about their schools, spouses and their jobs, hobbies, etc.) that may need to be preserved in institutional history.
<b>Next Steps</b>	The next steps should include any internal "follow up" steps that result from the meeting as well as a clear plan for a next interaction with the prospect that will move the prospect closer to making a gift.

#### 7.1.1 Initial Meeting

An "Initial Meeting" is one in which the Development Officer is meeting with a prospect for the first time for the specific purpose of discovery/engagement or speaking about a gift to UGA. An "Initial Meeting" may also be referred to as a "Discovery Visit" in conversation, but the official term embraced by UGA Development is "Initial Meeting." The Development Officer may have previously interacted with this prospect in a personal or professional setting (e.g., at Rotary Club or a fundraising event) but an "Initial Meeting" signifies the first planned and scheduled conversation about fundraising.

**Note:** A Development Officer will only have one "Initial Meeting" with a prospect.

## Prospect Management Policies and Procedures

**Note:** A phone call cannot be considered as an “Initial Meeting”.

### 7.1.2 Return Meeting

A “Return Meeting” is one in which a relationship has already been established with the prospect, and the Development Officer is returning to further the engagement effort and/or fundraising discussion.

**Note:** A Development Officer will most likely have several “Return Meetings” with a prospect.

### 7.1.3 Stewardship Meeting

A stewardship meeting is a type of ‘Return Meeting’ that should be used for any meeting that is helping continue the prospect’s relationship with UGA and may be connected with an effort to cultivate and solicit for a new (future) major gift.

- To enter a Stewardship Meeting, use the ‘Return Meeting’ contact method

**Note:** Stewardship meetings do not include attending an event like an art opening at the donor’s invitation or delivering a stewardship gift, this type of activity is considered a [Stewardship Interaction](#).

### 7.1.4 Discovery Meeting

Discovery Meetings are meetings with a prospect who has (1) never met with a UGA Fundraiser before or (2) hasn’t been met with by a UGA Fundraiser in the last 4+ fiscal years.

**Note:** For metric purposes, there is no need to do anything differently when inputting these interactions – the data is being calculated behind the scenes.

## 7.2 CATEGORY/SUB-CATEGORY

### 7.2.1 Prospect Management/Campus Assist

Campus Assist should be used for INTERNAL collaboration; meetings, phone calls, emails, etc. that take place with a colleague that is outside of your s/c/u and could include, but not limited to: faculty, deans, other development officers, and trustees.

Campus Assists will be captured by entering a contact report/interaction with a **Contact Method** of “Other” and the **Category:** Prospect Management AND **Sub-Category:** Campus Assist.

**Note:** Regardless of contact method used with Campus Assists, these will count towards your “other interactions” metric.

### 7.2.2 Prospect Management/Collaboration

External collaboration, defined as partnering with a colleague that is outside of your s/c/u and could include, but not limited to: faculty, deans and other development officers. Collaboration includes joint meetings and/or joint proposals.

- Meetings: Joint Meetings will be captured by entering a contact method of Initial or Return Meeting with a **Category:** Prospect Management AND **Sub-Category:** Collaboration.
- Asks: Joint Proposal/Asks will be captured by having a Secondary Manager and/or Secondary Solicitor(s) added to the plan.

**Note:** The Collaboration sub-category should be used for EXTERNAL collaboration; meetings that take place with a prospect/donor where a colleague from outside of your s/c/u is present.

### **7.3 OTHER TYPES OF CONTACT METHODS**

In addition to “Meetings,” several other meaningful contact methods for interactions should be recorded in GAIL. These interactions are of value as they are often important to move the gift conversation forward. While a Development Officer may have a meaningful conversation about a gift through one of these contact methods, it should never be entered as an “Initial Meeting” or “Return Meeting.”

#### **7.3.1 Campus Interaction**

The “Campus Interaction” contact method should be used for scenarios where the prospect is on campus for some specific purpose and interacts with a Development Officer (e.g., a tour of a building, a class speaking engagement, or a drop-by meeting while the prospect is visiting the campus).

#### **7.3.2 Email**

#### **7.3.3 Event Interaction**

The “Event Interaction” contact method should be used when a Development Officer interacts with a prospect at a group event, whether the event is a specific fundraising event (e.g., 4-H Gala or a small dinner gathering of prospects) or a more general UGA event (e.g., Bulldog 100 or a school’s tailgate event).

#### **7.3.4 Fax**

#### **7.3.5 Financial Advisor Interaction**

The “Financial Advisor Interaction” should be used when a Development Officer is meeting with a representative of a donor, such as a financial advisor or lawyer. This will often be used in relation to planned gifts.

#### **7.3.6 Letter**

#### **7.3.7 Board or Committee Interaction**

The “Board or Committee Interaction” contact method should be used for any Interaction with a prospect that takes place surrounding a board or committee meeting. Even if a sidebar conversation occurs with a prospect during the course of the board or committee meeting, the Interaction should still be entered as a “Board or Committee Interaction.”

#### **7.3.8 Other**

The “Other” contact method should be used for any Interaction that falls outside of the scope of the other labels. These interactions could range from interactions of a friendly nature (e.g., attending the wedding of a prospect’s child or the funeral of a prospect’s spouse) to chance encounters that progress into a fundraising conversation (e.g., sitting next to someone on a plane and then striking up a conversation about support after learning the person graduated from UGA).

**Note:** Use this option when you have a meeting that involves more than one Prospect. The meeting interaction should be on the main Prospect in the meeting. You can then add the guest as an interaction participant or by having their own ‘Other’ interaction. (11.25)

### **7.3.9 Phone Call**

#### **7.3.10 Pres/VP Meeting**

The “Pres/VP Meeting” contact method is used exclusively by Central Development Donor Relations & Stewardship. It is reserved for instances when the President and/or Vice President of Development and Alumni Relations meet with a donor to further the relationship and fundraising process. This meeting may or may not be the first time the President or Vice President have met the donor. This meeting will often include a Development Officer, who should enter his or her own interaction utilizing the Initial Meeting or Return Meeting contact method.

#### **7.3.11 Prospect Narrative**

The “Prospect Narrative” contact method is used exclusively by Central Development Donor Relations & Stewardship, the President’s Office, and the Principal Gifts Team to pull information into reports. Development Officers will generally not use this contact method but are allowed to if applicable.

#### **7.3.12 Sky Suite Interaction**

The “Sky Suite Interaction” contact method should be used for any interaction with a prospect in the Sky Suites during football season. Even if a sidebar conversation about fundraising happens in the Sky Suites, the interaction should still be labeled as a “Sky Suite Interaction.”

#### **7.3.13 Social Media**

The “Social Media” contact method should be used for communications that take place through social media platforms such as Twitter, Facebook, or LinkedIn. Because these forms of communication are often seen as more “personal” and less “official,” prospects may communicate in a more open and relaxed manner on these platforms. Therefore, in an effort to respect donor privacy, the Prospect Management Team asks that Development Officers summarize the highlights of these conversations rather than copy the entire text of the exchange when making “Social Media Interaction” entries in GAIL.

#### **7.3.14 Stewardship Interaction**

The “Stewardship Interaction” category should be used for any Interaction that is helping continue the prospect’s relationship with UGA but is not directly connected with an engagement effort or to solicit a new gift (e.g., attending an event like an art opening at the donor’s invitation or delivering a stewardship gift).

#### **7.3.15 Stewardship Reporting**

The “Stewardship Reporting” contact method is used exclusively by Central Development Donor Relations & Stewardship when a report is generated and sent to a specific donor. Examples of these reports include, but are not limited to Endowment Reports, Scholarship Gratitude Reports, Personal Impact Reports, Chair & Professorship Impact Reports, etc.

#### **7.3.16 Task**

The “Task” contact method should be used when entering planned or pending steps concerning internal tasks to be completed by Development Officers (e.g., “Create stewardship report” or “speak with Planned Giving representative”).

### 7.3.17 Text Message

### 7.3.18 University Top Prospect Strategy Notes

The “University Top Prospect Strategy Notes” contact method is primarily used by Research and Prospect Management along with the Principal Gifts team to record meaningful prospect strategy meeting notes about top university prospects. These notes include new knowledge about the constituent and/or activity that relates to strategy, gift conversations, or gift stewardship. Most Development Officers will not need to use this contact method.

### 7.3.19 Website

The “Website” contact method is generally used when utilizing a website’s contact form to reach out to a person or organization. It is also commonly used when submitting proposals through a website.

## 7.4 CONTACT REPORT VS. INTERACTIONS NOT TIED TO A PLAN

When entering Interactions into GAIL, it is important for Development Officers to distinguish between Interactions that are part of a plan and Interactions that are not tied to furthering a specific fundraising effort. GAIL defines Contact Reports as simply “interactions tied to a fundraising plan.” For any Interaction that is part of a fundraiser’s plan and can be considered to be moving the gift forward, a Contact Report needs to be filed. Contact Reports are filed by either completing a step within a plan or using the “Add step and interaction” feature on the prospect’s Interactions tab (12.28.2, 12.29).

**Note:** Interactions, once filed, cannot retroactively be tied to a plan as Contact Reports to complete plan steps. This connection must be made at the initial point of data entry. If an interaction needs to be moved to a plan as a step, please contact your Prospect Management Liaison for assistance as this is a manual process.

## 7.5 MEETINGS WITH MORE THAN ONE DEVELOPMENT OFFICER IN ATTENDANCE

If more than one development professional participates in a meeting, each fundraiser should enter their own unique Contact Report to receive credit for the meeting in the Development Officer Activity Report. Simply adding a meeting interaction with “See X’s meeting comments” or copy/pasting someone else’s content will not suffice, and the meeting will be changed to an “Other” interaction.

**Note:** Additional Development Officers should not be listed as “Participants” in Interactions/Contact Reports. That field is used to assign the same Contact Report to additional prospects involved (e.g., a spouse, siblings involved in an estate conversation, or simply assigning duplicate content to a group of people at an alumni gathering.)

## 7.6 DEADLINE FOR ENTERING INTERACTIONS IN GAIL

Interactions are to be entered into GAIL by 5:00 p.m. on the first business day of the month in order for the numbers to be included on that month’s Development Officer Activity Report, which is generally distributed by DAR Leadership on the second business day of the month. **Extensions will not be granted.** However, any interactions not entered by the monthly deadline will still be included in Fiscal Year totals once reviewed.

**Note:** Prospect Management reviews all meetings entered by Major Gift Officers each month. Prospect Management has to mark a meeting interaction as complete during their audit review process to count. You can review your Pending and Action Needed interactions in your Interaction Review Tab (12.9).



### 7.6.1 Development Officer Activity Report

The Development Officer Activity Report is an internal report distributed by DAR Leadership detailing Development Officers' fiscal year-to-date progress. This report is focused on Major Gifts and Major Gift Officers.

The Activity Report transparently reports last month activity by Major Gift Officer: meetings, other interactions, and major giving level asks (\$25,000+). Activity for the fiscal year is also included: meetings, other interactions, top 10 meetings, qualification meetings, collaboration, major giving level asks and revenue solicitor credit. Find it [here](#).

## 8 PROSPECT MANAGEMENT TEAM STRUCTURE

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### 8.1 STAFF MEMBERS

Prospect Management personnel include:

**Nedra Newton-Jones**, Executive Director of  
Prospect Management and Research  
[nedra11@uga.edu](mailto:nedra11@uga.edu)

**Tanner Poltzer**, Prospect Management Specialist  
[Tanner.poltzer@uga.edu](mailto:Tanner.poltzer@uga.edu)

**Danielle Free**, Senior Director of Prospect  
Management  
[bda92087@uga.edu](mailto:bda92087@uga.edu)

**Karine Bauch**, Prospect Management Specialist  
[karine.bauch@uga.edu](mailto:karine.bauch@uga.edu)

**Libby Shepherd**, Associate Director, Prospect  
Management  
[libby989@uga.edu](mailto:libby989@uga.edu)

**Andrew Hibbs**, Prospect Management Specialist  
[ah22799@uga.edu](mailto:ah22799@uga.edu)

## Prospect Management Policies and Procedures

### 8.2 RESEARCH AND PROSPECT MANAGEMENT LIAISON MODEL (RPM)

To provide the highest level of prospect management support for Major Gift Officers, Research and Prospect Management has adopted a liaison model allowing specific staff members to serve as the point of contact for a defined group of Major Gift Officers. RPM primarily work with Major Gift Officer portfolios. However, any Development Officer desiring help with portfolio clean-up and maintenance may reach out to their school's liaison for assistance. Prospect Management contact is listed at the top of each column and the Researcher contact is listed in parentheses.

Current liaison assignments are as follows (as of 03/2023):

<b>Tanner:</b>	<b>Libby:</b>	<b>Karine:</b>	<b>Andrew</b>	<b>Danielle:</b>
<b>4-H: Brooks (David)</b> - Adam Hammond  <b>FACS: Kathy (David)</b> - VACANCY  <b>Forestry: Kathy (Ryan)</b> - Bridget Harden  <b>PSO: Brooks (Ryan)</b> - Anne Moser  <b>BOTG: Brooks (David)</b> - Johnathon Barrett  <b>Law: Brooks (Heather)</b> - Jeremy Headrick - Kate O'Reilly  <b>Parent Giving: Jill (Heather/Eliza)</b> - Andrea Parris - Brittany Rider - Eric Schmidt - Courtney Ayers <b>Pharmacy: Kathy (Eliza)</b> - VACANCY - Gordon Thomas  <b>Public Health: Kathy (David)</b> - Lynnsey Lafayette  <b>Athens-Based Regionals: Jeremy (H/E)</b> - Beth Zimmerman - Rob Carrico - Chris Jefts - Matt Mize - Adam Prescott - Justin Hill <u><b>With Karine:</b></u> <b>Remote Regionals: (D/R)</b> Elizabeth Kozak - Katie Adams - Alysse Capitanelli	<b>CAES: Kathy (David)</b> - Mary Ann Parsons - Brian Brookey  <b>CED: Kathy (Ryan)</b> - Jennifer Messer  <b>COE: Kathy (David)</b> - Molly Thomas - Robby Poister  <b>GMOA: Brooks (David)</b> - Heather Malcom  <b>Journalism: Brooks (Ryan)</b> - Sara Cook  <b>Student Affairs: Brooks (Eliza)</b> - Steve Pitts  <u><b>With Danielle:</b></u> <b>Principal Gifts: Jeremy (Prisca/Ryan)</b> - Will Willimon - Lindsay Carter-Tidwell	<b>Vet Med: Kathy (Ryan)</b> - Adam Roell - Elizabeth Guest - Taylor Hicks - Michelle Jones  <b>Foundation Relations: Jill (Ryan)</b> - Matt Pruitt - Colleen Cherry  <b>Libraries: Brooks (Ryan)</b> - Lee Snelling  <b>SPIA: Brooks (Eliza)</b> - Sarah Baines  <b>Honors: (Ryan)</b> - Debbie Daniel  <b>Ecology: Kathy (David)</b> -Melissa Lee  <b>Social Work: Brooks (Vacant)</b> - Megan Powell  <b>Remote Regionals: Jeremy (D/R)</b> - Elizabeth Kozak - Katie Adams - Alysse Capitanelli - LaRisa Chambers - Chandler Boyle  <u><b>With Tanner:</b></u> <b>Athens-Based Regionals: (H/E)</b> - Beth Zimmerman - Rob Carrico - Chris Jefts - Matt Mize - Adam Prescott - Justin Hil	<b>Planned Giving: Jeremy (Prisca/Eliza)</b> - Mike Cook - Patrick Knowles  <b>Franklin: Kathy (Prisca/Ryan)</b> - Meredith Metcalf - Johnie Tucker - Aubrey Miller - Melissa Roberts  <b>PAC: Brooks (Eliza)</b> - Carlton Bain	<b>Athletics: Jeremy (Prisca/Ryan)</b> - Ford Williams - Brad Bell - Travis Epling - Kevin Miller - Sean Chapas - Brandon Boykin - Jon Burkett -Brooke Robbins  <u><b>With Libby:</b></u> <b>Central: (Prisca/Ryan)</b> - Kathy Bangle - Brooks McCommons - Jill Walton - Jeremy Ransom - Siara Abdulla

## Prospect Management Policies and Procedures

<ul style="list-style-type: none"> <li>- LaRisa Chambers</li> <li>- Chandler Boyle</li> </ul> <hr/> <p><b>Engineering: Kathy (Eliza)</b></p> <ul style="list-style-type: none"> <li>- Jan Blaine</li> <li>- Jordan DeRosa</li> </ul> <p><b>Terry: Brooks</b> <b>(David/Heather/Prisca)</b></p> <ul style="list-style-type: none"> <li>- <b>Kathy Ortstadt**</b></li> <li>- Andrea Burruss</li> <li>- Brandon Cochran</li> <li>- Kathy O'Bryan</li> <li>- Ruth Seiler</li> </ul>		<hr/> <p><b>OBE: Kelly (Prisca/Ryan)</b></p> <ul style="list-style-type: none"> <li>- Kyle Tschepikow</li> <li>- Stacy Stanford</li> <li>- Allison Chesnutt</li> </ul>		
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## 9 PORTFOLIO REVIEW MEETINGS

### 9.1 QUARTERLY DIRECTOR MEETINGS

Quarterly, Directors of Development have the opportunity to meet with assigned Prospect Management Liaisons for portfolio reviews. These meetings serve as an opportunity to speak personally and openly about portfolio progress.

#### 9.1.1 Attendees

Development Directors are the only staff members required to attend the quarterly meetings. Directors with assistants who help with the input of data are welcome to invite those additional staff. Directors' supervisors are also welcome to participate in the meeting but are not required.

**Note:** If a Director would like for a Leadership Annual Giving Officer to attend a team meeting, they are welcome to invite that officer. However, the Director should notify his or her Prospect Management Liaison so that the officer's portfolio file can be prepared prior to the meeting.

#### 9.1.2 Agenda Items

Prospect Management has developed a Snapshot which drives the majority of the meeting dialogue. This Snapshot focuses on the current fiscal year progress to goals and pipeline projection as well as Top 10 Strategy, portfolio composition and prospects to qualify. Items discussed will include (but will not be limited to):

1. Portfolio Composition
2. Top 10
3. Open opportunities for the current year and those in the next 3 fiscal years
4. Referrals received from Research
5. Plans with No Significant Activity in Last 12 Months
6. Meetings and Interactions entered
7. Estimated giving capacity of prospects in the portfolio
8. Active plans with revenue committed
9. Portfolio valuation and revenue projection

## Prospect Management Policies and Procedures

10. “Response Pending” opportunities

11. Any questions that the Development Director may have for the Prospect Management Team

### 9.1.3 Quarterly Meeting Structure

Q1 - Jump-start meeting focused on portfolio composition and pipeline review

- DO Assessment Review
- Portfolio Composition – Pipeline Review, Top 10
- Opportunity Clean Up

Q2 - Standard RPM meeting following Agenda

Q3 - Standard RPM meeting following Agenda

Q4 - Wrap-up meeting focused on portfolio clean-up and data accuracy

- Open Opportunities and Asks Made (AFYC)
- Likelihoods
- Plans with Revenue Committed/Missing Revenue
- Next Pending Step(s)

### 9.1.4 Sample RPM Agenda

## Agenda

### Lindsay Carter-Tidwell RPM Quarterly Meeting

March 16, 2020

9:00 – 10:00

Attendees: Lindsay Carter-Tidwell, Jeremy Ransom, Danielle Free, Katalina Williams, Prisca Zaccaria, Kayla Hembree

**Old Business** – 5 minutes

**Portfolio Composition** - 25 minutes

*Focus on the health and composition of each portfolio to determine the level of balance and quality of prospects.*

- a. Top 10 (new activity and next steps)
- b. Principal Gift Prospects
- c. Prospect Development

**Prospects to Qualify** – 15 minutes

*Discuss the ten oldest referrals, present new referrals, look at upcoming travel, review miscellaneous prospects and special projects that RPM can assist with.*

**Development Officer Snapshot** – 15 minutes

- a. Progress to Goals
- b. Pipeline Projection
- c. Donor Engagement Process

## 10 ADVANCEMENT RESEARCH

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The Prospect Management Team works closely with the Advancement Research Team to ensure that Major Gift Officers understand the individual prospects in their portfolios.

### 10.1 INTRODUCTION

Advancement Research supports fundraisers by providing publicly available biographical, business, and financial information on prospective donors or volunteers. The goal is to provide accurate and timely information that enables effective decision-making.

Research uses institutional knowledge, the GAIL donor database, wealth screenings, free public sources, and paid subscription services containing warehoused publicly available information to prepare prospect profiles.

Research is skilled at creating, acquiring, and transferring knowledge and leveraging this knowledge for positive organizational change. Research is committed to regularly evaluating common goals and objectives and continuously developing more effective and efficient ways of meeting these goals.

If you have questions about Advancement Research's products or services, contact Senior Director of Advancement Research, Prisca Zaccaria ([prisca@uga.edu](mailto:prisca@uga.edu)).

### 10.2 ADVANCEMENT RESEARCH SERVICES

Research provides a number of services to over 90+ requestors across campus, including individual Development Officers and administrators in the University's schools, colleges, and units. The following are the primary services that Development Analysts in Research provide to serve the University community:

- Reactive Research
  - Providing requested supporting information on known UGA donor prospects
- Proactive Research and Referrals
  - Identifying new donor prospects with potential capacity and inclination to support UGA
- Wealth Screenings
  - Compiling information from external public services to ascertain wealth indicators
- Top Prospects
  - Identifying Principal Gift potential, interests, ask strategies, and suggested gift amounts
- Special Projects

#### 10.2.1 Referral Tracking System

One of the most crucial ways the Advancement Research Team partners with Prospect Management is through the Referral Tracking System. This system was custom-built to create and maintain a transparent record of all proactive prospects assigned to Development Officers as referrals by Research. Once a Referral is made by a Development Analyst through this system, the Major Gift Officer must accept or reject the Referral using the My Referrals tab (12.31). If accepted, Prospect Management adds the suspect to the Development Officer's portfolio by entering a Suspect Referral Plan.

**Note:** Development Officers must personally accept or reject Referrals through GAIL using the Referral Tracking System. Development Analysts do not have the ability to accept or reject Referrals for fundraisers based on emailed responses.

## **11 FREQUENTLY ASKED QUESTIONS**

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### **11.1 WHO IS INCLUDED IN MY PORTFOLIO AND HOW DO I GET THAT LIST?**

Your portfolio includes any prospect that you are connected to as Prospect Manager, Primary Manager, Secondary Manager or Secondary Solicitor. You may access your portfolio at any time through your My Fundraiser Page in GAIL (12.1). You may also request a copy of your portfolio from your Liaison (8.1).

### **11.2 IS THERE A WAY FOR ME TO SEE A LIST OF SPECIFIC TYPES OF PLANS THAT ARE IN MY PORTFOLIO?**

Yes. The “Prospects and Plans” tab on your My Fundraiser Page includes several filters that allow you to sort based on Plan Type, Plan Stage, and Opportunity Status.

**Note:** Prospects will only show up here if there is a plan associated with the record.

### **11.3 CAN I REMAIN PROSPECT MANAGER ON A PROSPECT IF I DO NOT HAVE A PLAN ON THEM?**

You must have a Major Giving Plan on a prospect in order to retain Prospect Manager status. Exceptions are granted by Prospect Management and DAR Leadership only in rare cases involving high-level prospects (3.2.1).

### **11.4 CAN I GET EMAIL UPDATES ABOUT A PROSPECT IF THEY ARE NOT IN MY PORTFOLIO?**

Yes. You will simply need to manually add them to your “Prospects of” group (12.10.2). For instructions on how to set up email alerts if you are not already receiving them, contact The Office of Client Services (11.21).

### **11.5 HOW DO I REMOVE MYSELF AS PROSPECT MANAGER?**

To remove Prospect Manager status, send an email request to your Prospect Management Liaison with the prospect GAIL ID and your request to be removed as Prospect Manager (3.7).

### **11.6 WHAT IS THE DIFFERENCE BETWEEN A SECONDARY MANAGER AND A SECONDARY SOLICITOR?**

A Secondary Manager on a plan is a person who works closely with the Primary Manager to cultivate and solicit a prospect for a gift. If only one other Development Officer is working with the Primary Manager, this person should be added to the plan as a Secondary Manager. There can be only one Secondary Manager. A Secondary Solicitor is also involved in the solicitation of a gift, but may be less involved in the development and execution of the plan. There may be more than one Secondary Solicitor (3.1.3, 3.1.4).

### **11.7 CAN I ADD A PLAN ON SOMEONE WITHOUT THE PROSPECT CONSTITUENCY IN GAIL?**

You may add a plan on anyone in GAIL, regardless of whether they already have the Prospect tab or not. If the person is not already labeled as a prospect, you will simply need to add the constituency to their record (12.12).

### **11.8 CAN I EDIT A PLAN NAME ONCE I HAVE ADDED A PLAN?**

Yes. Within the plan screen, click on the “Edit plan details” link under “Tasks” in the upper left corner of the screen. This will allow you to edit the plan name, plan type, start date and site (12.24).

### **11.9 WHAT IS THE DIFFERENCE BETWEEN AN “EXPECTED ASK AMOUNT” AND AN “ASK AMOUNT”?**

The “Expected Ask Amount” is what a Development Officer plans to ask for. This amount is a Development Officer’s best guess. The “Ask Amount” is the amount that is actually requested. These two amounts are often the same, but they can widely vary based on various circumstances (6.2.3,6.2.6).

### **11.10 SHOULD I HAVE ONE OPPORTUNITY PER PLAN OR SHOULD I HAVE MULTIPLE OPPORTUNITIES PER PLAN?**

The Prospect Management Team prefers that each plan have only one Opportunity. This provides cleaner data for reports. However, Development Officers may add multiple opportunities in the case of Leadership Annual Giving Plans or Major Giving Plans where both asks are immediate. If the opportunity is a planned gift, Prospect Management recommends that this have its own plan (6.3).

### **11.11 HOW DO I KNOW IF MY PROSPECT’S REVENUE HAS BEEN ASSOCIATED WITH MY PLAN?**

When a prospect is added to your portfolio they are automatically added to your “Prospects of” group. You are then able to sign up to receive activity notifications on these prospects. One option is to receive notification when a gift has posted to your prospect’s record. On that daily digest there is a field called ‘Associated Plan Name’, if this is blank the contribution has not been connected to a plan. If it is populated, that is the name of the plan that has the revenue tied to it (12.37).

### **11.12 HOW DO I ASSOCIATE REVENUE TO AN OPPORTUNITY?**

Associating revenue with an opportunity is a manual process that takes place during the depositing and posting of a gift in GAIL by the Gift Accounting Team. Development Officers do not have the ability to associate revenue to an Opportunity. If you notice that a gift has come in but has not been properly associated with your Opportunity, you will need to reach out to your RPM Liaison. (12.27)

**Note:** It is important to make sure that your Opportunity is as up-to-date and accurate as possible before the revenue is in GAIL; change the status from Response Pending to Accepted and include the Accepted Amount and Response Date.

### **11.13 HOW DO I KNOW IF REVENUE HAS BEEN ASSOCIATED TO AN OPPORTUNITY?**

To see that revenue has been associated to a plan, navigate to the “Opportunities” tab within your plan, click the green “Go to opportunity” arrow, and look at the Opportunity details. This screen will show a “Revenue committed” amount (12.26).

### **11.14 CAN I ENTER A PLAN AFTER A GIFT COMES IN SO THAT I STILL RECEIVE CREDIT?**

As a general rule, plans with an Opportunity must be entered *before* a gift is received for Development Officer credit to be assigned. Exceptions to this policy will be granted on an extremely limited basis by Senior Directors of Development for Constituent Programs.

### **11.15 CAN I MAKE AN OPPORTUNITY HISTORICAL?**

No. Plans can be made historical, but not individual Opportunities within plans.

### **11.16 HOW CAN I SEE A LIST OF THE MEETINGS AND INTERACTIONS I'VE ENTERED INTO GAIL THIS MONTH?**

In order to see how many meetings or interactions you've completed within a specified time period, you can pull the "Custom Interactions Report" in GAIL. This report will allow you to view completed interactions by selecting a specific time period as well as specific interaction contact methods (12.33).

### **11.17 HOW DO I DELETE AN INTERACTION?**

Development Officers do not have the ability to delete interactions. If you have entered an interaction in error, please edit the title of the interaction to "Delete" and email your Prospect Management Liaison with the constituent ID and instructions to delete the erroneous interaction.

### **11.18 CAN I TRANSFER STEPS BETWEEN PLANS OR RETROACTIVELY TIE AN EXISTING STEP TO A PLAN?**

No. Unfortunately GAIL does not provide the ability to move steps from one plan to another or to connect an existing step to a plan.

### **11.19 SOMETHING DOESN'T LOOK RIGHT ON THE DEVELOPMENT OFFICER ACTIVITY REPORT: WHO DO I CONTACT?**

The Development Officer Activity Report is an internal report distributed on a monthly basis by DAR Leadership showing a tally of gifts raised as well as meetings and other interactions completed (12.34). The Prospect Management Team can assist Development Officers with general questions about the Development Officer Activity Report and help associate revenue if necessary, pending Senior Director approval. However, because the majority of questions about the Development Officer Activity Report involve solicitor credit, Development Officer Activity Report questions should be directed to the Senior Directors of Development for Constituent Programs first, with the Prospect Management Team providing support if necessary.

### **11.20 WHAT STANDARD REPORTS DOES PROSPECT MANAGEMENT PROVIDE? HOW CAN I ACCESS THEM?**

The Prospect Management Team provides several reports for review during quarterly meetings with Development Officers. A Snapshot is provided during standing meetings, and reports addressing data integrity will be sent by the Prospect Management Liaison on a monthly basis. A Development Officer may request information from any of these reports at any time by contacting his or her Liaison (9.1.2, 9.1.4).

### **11.21 I HAVE A REQUEST FOR SOMETHING GAIL RELATED, BUT I DON'T THINK IT IS A PROSPECT MANAGEMENT QUESTION: WHO DO I CONTACT?**

- If you would like a list pulled for your prospecting and cold-calling purposes, submit a request with your specific criteria to AskIT ([askit@uga.edu](mailto:askit@uga.edu)).
- If you need any information on a constituent's record updated, contact Records ([records@uga.edu](mailto:records@uga.edu)).
- If you have questions about how to complete specific tasks in GAIL, contact The Office of Client Services ([askit@uga.edu](mailto:askit@uga.edu)).



## Prospect Management Policies and Procedures

- If you need an explanation of wealth scores or have questions about the specific research products that the Research team can offer to Development Officers, contact the Senior Director of Advancement Research, Prisca Zaccaria ([prisca@uga.edu](mailto:prisca@uga.edu)).
- If you have a question about revenue being correctly tied to an Opportunity, contact your Senior Director for Constituent Programs (Brooks McCommons or Kathy Bangle) and/or your RPM Liaison (8.1).

### **11.22 WHEN SHOULD I CHANGE MY OPPORTUNITY STATUS FROM RESPONSE PENDING TO ACCEPTED (OR REJECTED)?**

Once you have received a verbal or written acceptance/rejection of the proposal you can change the opportunity status to Accepted or Rejected as applicable. There is not a need to wait until everything has been committed to change the status; solicitor credit is not assigned until a gift has been committed in GAIL.

### **11.23 WHAT SHOULD I AVOID WRITING IN MY INTERACTION?**

Keep the interaction to relevant and essential information. Be cautious when providing sensitive personal information. Remember, these interactions are open to public record, so as a general rule, refrain from listing specific details regarding medical information/health concerns.

### **11.24 I WANT TO REACH OUT TO A PROSPECT. THERE ISN'T A PLAN AND THE LAST CONTACT MADE BY A DO WAS 3 YEARS AGO — DO I NEED TO ASK PERMISSION TO REACH OUT?**

No with an exception. If there is a Prospect Manager you should definitely reach out to the them. No plan, fair game. It is always a professional courtesy to reach out to the last DO to have made contact to let them know of your plans but not a requirement. You should ALWAYS read through interaction in the event there is relevant information included.

### **11.25 I SCHEDULED A (LUNCH) MEETING WITH A PROSPECT WHO DECIDED TO BRING A GUEST, DO I GET TO ENTER TWO MEETING INTERACTIONS?**

No, the meeting interaction will be on the Prospect in which the meeting was originally scheduled. You can add the guest as an interaction participant or have an 'Other' interaction on the guest's profile. You will only receive Meeting credit for one of the Prospects.

### **11.26 WHAT IS CONSIDERED A SIGNIFICANT ACTIVITY?**

A significant activity in regards to the No Significant Activity report used by Prospect Management, refers to an interaction that is one of: email, phone, initial meeting, or return meeting.

### **11.27 WHAT IS A UNIVERSITY TOP PROSPECT GROUP?**

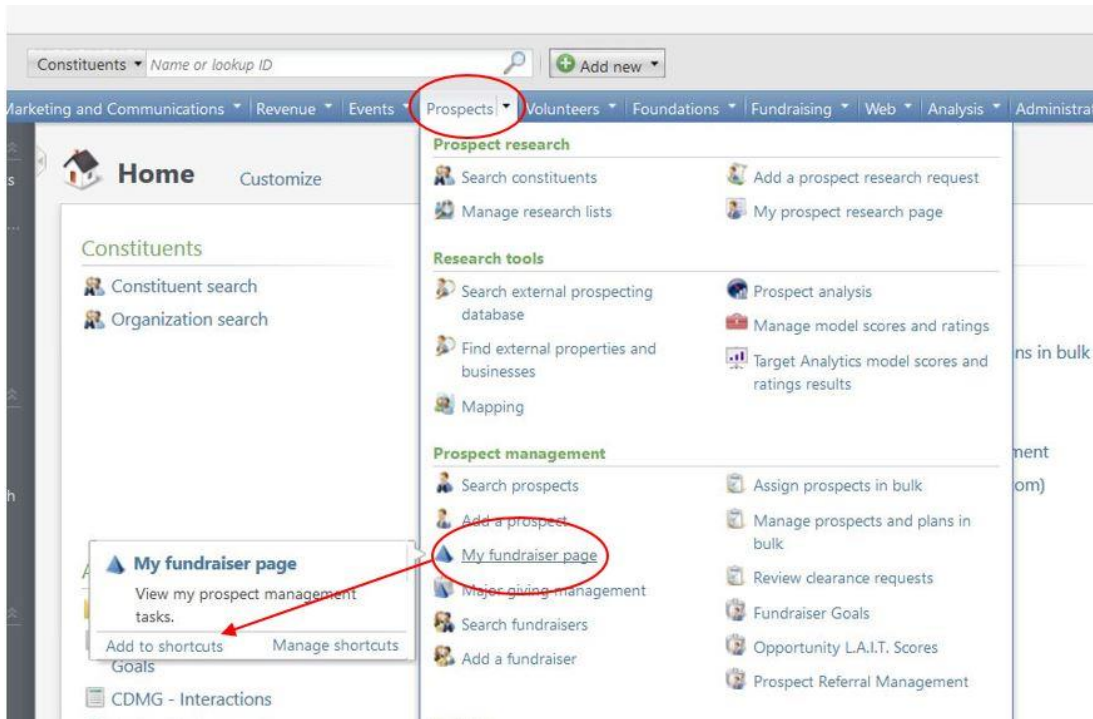
A University Top Prospect is a qualified and engaged prospect who is well-cultivated, committed and has demonstrated the interest and capacity to make a gift at the principal level or above.

We currently have three "University Top Prospect" groups in GAIL. Each group is made up of constituents that meet wealth criteria defined by RPM and Central Leadership i.e. Estimated Giving Capacity of \$1M+, \$5M+, \$10M+.

## 12 How-To

### 12.1 NAVIGATING TO THE MY FUNDRAISER PAGE

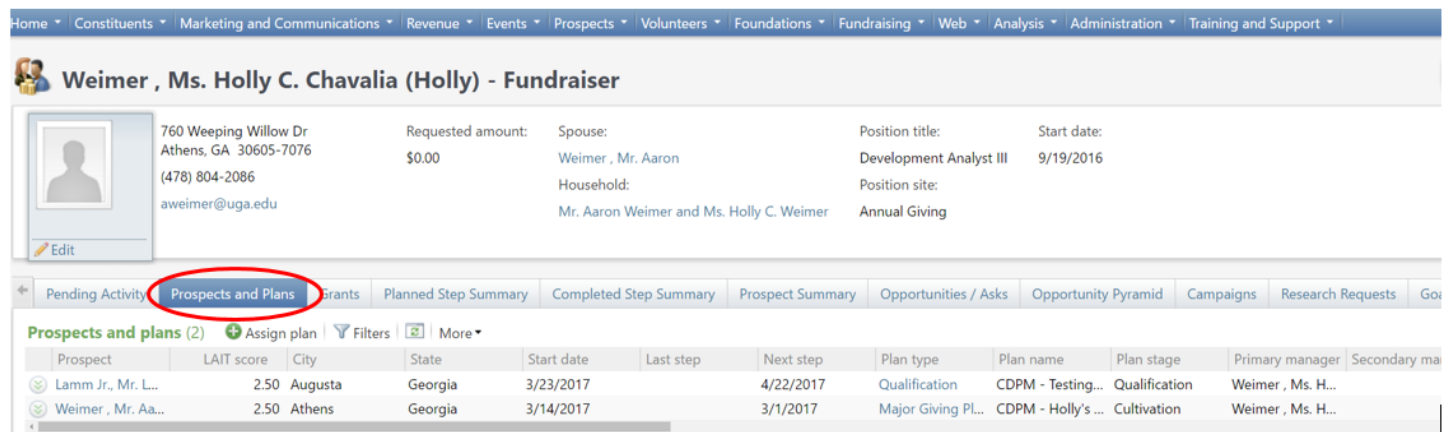
Locate “My fundraiser page” under the Prospect Management section of the blue Prospects tab (2.2.1). You may also add this section to your shortcuts for quicker access. You can also access this page by navigating to your personal constituent record in GAIL and clicking on your “Fundraiser” constituency link.



### 12.2 PROSPECTS AND PLANS TAB

Your “My fundraiser page” includes several tabs that contain important information about your portfolio. The “Prospects and plans” tab is where you will find the list of people included in your portfolio.

Note: Your tabs may be in a different order- Main tabs and blue sub-tabs may be rearranged and customized to each individual fundraiser’s preferences.

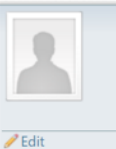


## 12.3 PROSPECTS AND PLAN SECTION

The first section, “Prospects and Plans,” includes every plan that you are connected to as Primary Manager, Secondary Manager, or Secondary Solicitor.

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Web ▾ Analysis ▾ Administration ▾ Training and Support ▾

**Weimer , Ms. Holly C. Chavalia (Holly) - Fundraiser**

 760 Weeping Willow Dr  
Athens, GA 30605-7076  
(478) 804-2086  
aweimer@uga.edu

Requested amount: \$0.00

Spouse: Weimer , Mr. Aaron  
Household: Mr. Aaron Weimer and Ms. Holly C. Weimer

Position title: Development Analyst III  
Position site: Annual Giving

Start date: 9/19/2016

[Edit](#)

← Pending Activity **Prospects and Plans** Grants Planned Step Summary Completed Step Summary Prospect Summary Opportunities / Asks Opportunity Pyramid Campaigns Research Requests Go

**Prospects and plans (2)** [Assign plan](#) [Filters](#) [More](#)

Prospect	LAIT score	City	State	Start date	Last step	Next step	Plan type	Plan name	Plan stage	Primary manager	Secondary ma
Lamm Jr., Mr. L...	2.50	Augusta	Georgia	3/23/2017		4/22/2017	Qualification	CDPM - Testing...	Qualification	Weimer , Ms. H...	
Weimer , Mr. Aa...	2.50	Athens	Georgia	3/14/2017		3/1/2017	Major Giving PL...	CDPM - Holly's ...	Cultivation	Weimer , Ms. H...	

## 12.4 PROSPECT ASSIGNMENTS SECTION

The second section, “Prospect assignments,” shows every prospect that you are assigned to as Prospect Manager and have a plan on.

**Prospect assignments (2)** [Add](#) [Filters](#) [More](#)

Prospect	City	State	Last step	Next step	Sites	Role
<b>Prospect manager</b>						
Lamm Jr., Mr. Leon Taylor 2006	Augusta	Georgia		4/22/2017	Development	Prospect Manager
Weimer , Mr. Aaron	Athens	Georgia		3/1/2017		Prospect Manager

## 12.5 PROSPECT ASSIGNMENTS WITHOUT A PLAN

To include prospects who you are assigned to as Prospect Manager but do not have a plan on, select the Filters icon and check “include historical plans”. Select Apply.

**Prospect assignments (38)** [Add](#) [Filters](#) [More](#)

Sites:  [Include historical plans](#) [Apply](#) [Reset](#)


## 12.6 PENDING ACTIVITY TAB

The “Pending Activity” tab contains a list of all pending steps that you own. GAIL’s default setting is to only list interactions connected to a plan. However, the filter feature can be used to include pending interactions that are not tied to plans.

## Prospect Management Policies and Procedures

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Web ▾ Analysis ▾ Administration ▾ Training and Support ▾

**Weimer, Ms. Holly C. Chavalia (Holly) - Fundraiser**

 760 Weeping Willow Dr  
Athens, GA 30605-7076  
(478) 804-2086  
aweimer@uga.edu

Requested amount: \$0.00

Spouse: Weimer, Mr. Aaron  
Household: Mr. Aaron Weimer

Position title: Development Analyst III  
Start date: 9/19/2016

**Check here to include pending interactions not tied to plans.**

Pending Activity | Prospects and Plans | My Prospect Referrals | Grants | Planned Step Summary | Completed Step Summary | Prospect Summary | Opportunities / Asks | Opportunity Pyramid | Campaigns

**Pending activity (3)** Filters More ▾

Sites: All sites Only show steps owned by this fundraiser ☒ Include general interactions Apply Reset


Search Columns Clear all filters

### 12.7 MY PROSPECT REFERRALS TAB

The “My Prospect Referrals” tab contains a record of all referrals that have been made by Research. More will be explained in section 12.31.

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Web ▾ Analysis ▾ Administration ▾ Training and Support ▾

**Weimer, Ms. Holly C. Chavalia (Holly) - Fundraiser**

 760 Weeping Willow Dr  
Athens, GA 30605-7076  
(478) 804-2086  
aweimer@uga.edu

Requested amount: \$0.00

Spouse: Weimer, Mr. Aaron  
Household: Mr. Aaron Weimer and Ms. Holly C. Weimer

Position title: Development Analyst III  
Position site: Annual Giving  
Start date: 9/19/2016

Pending Activity | Prospects and Plans | **My Prospect Referrals** | Grants | Planned Step Summary | Completed Step Summary | Prospect Summary | Opportunities / Asks | Opportunity Pyramid | Campaigns

**Prospect Referrals (4)** Filters More ▾

Due Date	Referred To	Researcher	Prospect	Prospect Lookup ID	Director	Referral Type	Referral Status	Provisional
----------	-------------	------------	----------	--------------------	----------	---------------	-----------------	-------------

## 12.8 ADDING PROSPECT PORTFOLIO RATINGS

To add a portfolio rating on a prospect, navigate to their Prospect tab then click on the Portfolio Rating sub tab. Click the Add button and select the appropriate Portfolio rating type and value, enter your name in the Estimate by field, add a start date and save.

**Note:** This process also applies to adding at Top 10 indicator to prospects.

## 12.9 INTERACTION REVIEW: REVIEWING COMPLETED, PENDING AND ACTION NEEDED INTERACTIONS

To review your meeting interactions that have been marked as complete, pending and/or action needed by a member of the Prospect Management Team, navigate to your My Fundraiser Tab and select the Interaction Review sub tab.



Interaction Review Status		
Interaction Review Status	Review Start Date	Review Comm
Completed - complete/no act...	5/10/2021 11:14:11 AM	
Completed - complete/no act...	1/7/2021 11:24:31 AM	

### 12.9.1 Review Comment

If your meeting interaction has 'Action Needed' as a Interaction Review Status, Prospect Management would have included a comment as to what needs to be updated in the 'Review Comment' section.

## Prospect Management Policies and Procedures

### 12.9.2 Filtering Interaction Review Page

You can filter your meeting interactions by the Interaction Review Status. You can also filter on the interaction's actual date but it will only pull on or after a specified date.

The screenshot shows the 'Interaction Review' page with a yellow header bar. In the header, there is a 'Filters' button circled in red. Below the header, there are two input fields: 'Actual date on or after:' with a date picker icon, and 'Interaction Review Status equal to:' with a dropdown menu. To the right of these fields are 'Apply' and 'Reset' buttons, both circled in red.

### 12.10 THE “PROSPECTS OF” GROUP

The “Prospects of” group is an automatically generated group in GAIL that includes all prospects that a fundraiser is connected to as Prospect Manager, Primary Manager, Secondary Manager, or Secondary Solicitor. It also includes any constituent listed as a plan participant on any of a fundraiser's plans. To find this group, simply search for “Prospects of [fundraiser name]” and make sure that the “Groups/Households” box is clicked in the Advanced search options section (2.2.2).

**Note:** Daily digest alert emails generated by GAIL and sent to Development Officers are based on this group.

#### 12.10.1 Members Tab

Once you navigate to your “Prospects of” group, select the blue “Members” tab to find your group members.

**Note:** Your tabs may be in a different order.

The screenshot shows the 'Prospects of' group page. The 'Members' tab is selected and circled in red. Below the tabs, there is a table of group members. A red box highlights a row with the following data: Name (blank), Top LAIT score (2.50), FY Recognition Total (57.50), Lifetime Recognition (34.00), City (Savannah), State (Georgia), Start date (4/25/20), End date (9/5/2014), and Role (Plan Participant Only). A red arrow points from the text box to the 'Role' column.

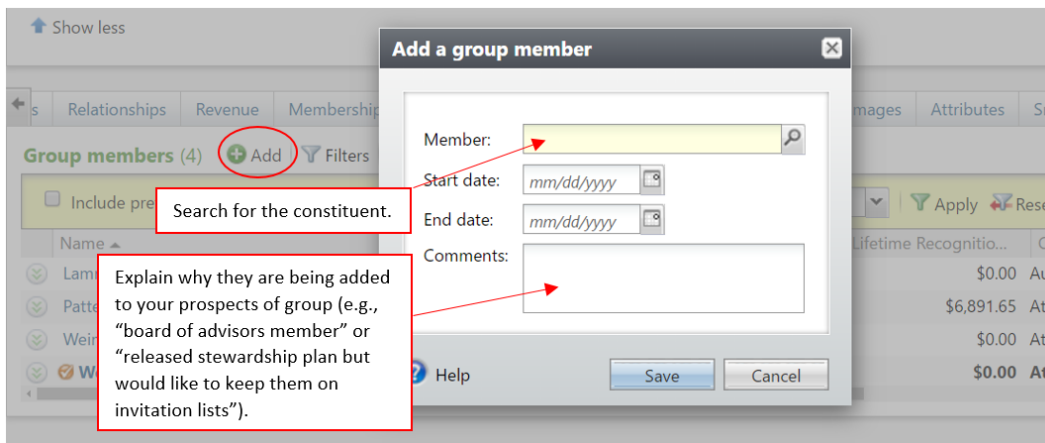
If a person is showing up in the “Prospects of” group because they are listed as a plan participant, it will be indicated here.

#### 12.10.2 Manually Adding Prospects

If you do not have a plan on a prospect but would like to add them to be part of your “Prospects of” group so that you receive email alerts about their giving or any activity on their record, this can be done manually (2.2.2). On the members tab of the Prospect of group constituent page click the ‘Add’ button.

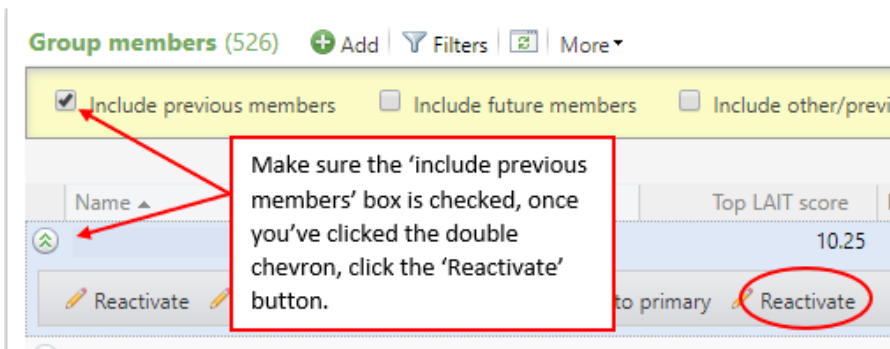


## Prospect Management Policies and Procedures



### 12.10.3 Reactivating Previous Members

To include prospects that once were in your portfolio to your "Prospects of" group, check the 'Include previous members' check box, locate the previous member, click the double down arrows, and select the 'Reactivate' button. An internal process will run and update your group to include these members.



## 12.11 ADDING A CLEARANCE REQUEST

To request Prospect Manager status on an individual through GAIL, click on the “Add clearance request” button under Tasks on the left side of the prospect’s record. A pop up form will appear to complete the request. Please refer to Section 3.2.1 for the criteria that must be met before requesting Prospect Manager status.

**Note:** If the prospect already has an assigned Prospect Manager, this button will not appear.

**Tasks**

- Add clearance request**
- Add Wilkerson, Mrs. Laura Catherine Ford 2008 to a group or household
- Edit link to user
- Remove spouse
- View
- Application user
- More information
- Wealth and ratings
- Reports
- Constituent profile
- Constituent Credit
- Prospect Summary Briefing
- Top Campaign Strategy Profile
- Constituent Revenue Information Page
- Reports

**Blackbaud**

**Individual**

Constituencies: /

Personal Information

Primary Relationship

Spouse

Wilkerson, Mrs. Laura Catherine Ford

Household

Prospect: Wilkerson, Mrs. Laura Catherine Ford

Prospect Manager: [Select]

Strategy: [Select]

Personal visit completed?: No

If no, explain: [Text Area]

Interests: Funding Interest

Save Cancel

Select the requesting major gift officer.

At minimum, an Initial Meeting is required for Prospect Manager status to be granted.

Provide a thoughtful and detailed narrative concerning why there is a need for you to serve in the role as Prospect Manager rather than just Primary Manager of a plan.

## 12.12 ADDING THE PROSPECT CONSTITUENCY

If you would like to add a plan on a prospect but they do not yet have the Prospect constituency, you will need to add that constituency on the individual’s GAIL record (2.4). Once this constituency has been added, the Prospect tab will appear on their constituent record and you will be able to add a plan.

Configure prospect email alerts

My UGA Email Alerts

View as

Application user

More information

Wealth and ratings

Reports

Constituent profile

Constituent Credit Total

Prospect Summary Briefing

Top Campaign Strategy Profile

Show less

Personal Info

Relationships

Documentation and Interactions

Rever

Constituencies

Personal

Constituencies (6)

+ Add

Filters

More

Descr	Date from	Date to
Advocate	5/10/2008	
Board member	3/31/2015	
Staff	12/15/2016	
Fundraiser	3/1/2014	
Prospect	7/31/2016	6/30/2017
Volunteer	3/1/2014	
User-defined		

Constituency Managers (0)

+ Add

More

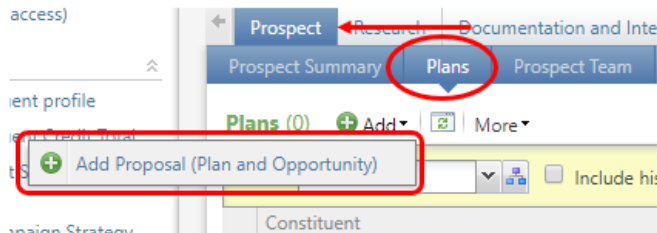
Manager



## 12.13 HOW TO ADD A PLAN

A plan should be entered from the “Plans” subtab under a constituent’s Prospect tab (4.1).

**Note:** You will select “Add proposal (plan and opportunity)” when adding a new plan. The plan type (Major Giving, Leadership Annual, Stewardship, etc.) will be selected on the next screen.



## 12.14 HOW TO ENTER PLAN DETAILS

Once you have clicked “Add major giving plan,” enter all pertinent plan details on this screen. The yellow highlighted fields are required.

**Note:** Plan participants can be added after the plan has been created.

The screenshot shows the 'Add a Proposal (Plan and Opportunity)' form. The form has several sections and fields:

- Plan Information:** This section contains the following fields:
  - Plan name:** A text field with a red arrow pointing to it and a red box containing the text: "Provide a concise and descriptive name for your plan. Always begin plans with your unit's official naming convention (i.e. 'CDMG – Need Base Scholarsh".
  - Plan type:** A dropdown menu.
  - Start date:** A date field with a calendar icon, showing '3/4/2020'.
  - Primary manager:** A text field with a search icon, showing 'Weimer, Ms. Holly Chavalia C'.
  - Secondary manager:** A text field with a search icon.
  - Start date:** A date field with a calendar icon, showing 'mm/dd/yyyy'.
  - Site:** A dropdown menu with options: 'Major Giving Plan', 'Long-Term Stewar...', 'Stewardship', 'Leadership Annual ...', 'Campaign Principal...', and 'UGA Alumni Associ...'.
  - Stage:** A dropdown menu.
  - Strategy:** A large text area with a red arrow pointing to it and a red box containing the text: "Your strategy should provide detailed information about the plan for your plan as well as timing and purpose for the gift."
- Other fields:**
  - This will include a planned gift discussion:** A checkbox with a red arrow pointing to it and a red box containing the text: "Check this box if you plan to have a discussion with the prospect regarding estate giving."
  - Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

### 12.14.1 Example of a Proper Strategy

A plan strategy should provide an overview of key cultivation and solicitation components and include a biographical sketch, information about capacity and inclination, and a strategy statement (5.1).

**Note:** You are limited to ~990 characters including spaces.

Example: *“John Doe is a high profile ‘90 Franklin grad based in Atlanta (with properties in Italy, Belgium, and the Cayman Islands) who participated in the Cortona study abroad program. He mentioned in a Forbes article that his experience there inspired him to start his company, Study Tourists, a technology company catering to parents with students abroad. Services include rental of tablets and international phones, as well as a secure*

## Prospect Management Policies and Procedures

app that students and parents can use to check in and provide location updates. John has expressed interest in providing scholarship support to Franklin for students interested in international technology, but he has mentioned that his wife is not on board just yet. I plan to cultivate John and his wife for a \$3M gift by the end of FY19, and will coordinate with Jeremy Ransom in Principal Gifts.”

### 12.15 ADDING OPPORTUNITY INFORMATION WITHIN PLAN

Depending on the stage that is selected (either Cultivation or Solicitation) an opportunity box will appear below the plan details. When the Cultivation stage is selected, limited options appear. If Solicitation is selected there are few more options with status; Ask Amount and Ask Date. The yellow highlighted fields are required.

**Left Screenshot (Cultivation Stage):**

- Plan name: CDMG - Need Based Scholarship
- Plan type: Major Giving Plan
- Site: Prospect Management
- Stage: Cultivation
- Status: Qualified (highlighted in yellow)
- Expected ask amount: \$0.00 (highlighted in yellow)
- Expected ask date: mm/dd/yyyy
- Expected fiscal year to close: mm/yyyy
- Callout: "Qualified" is the default and only option when selected stage is "Cultivation". Expected Ask Amount must be larger than \$0.00.
- Callout: Use the drop-down to select a fiscal year in which the gift is anticipated to be closed (i.e. received and committed).

**Right Screenshot (Solicitation Stage):**

- Plan name: CDMG - Need Based Scholarship
- Plan type: Major Giving Plan
- Site: Prospect Management
- Stage: Solicitation
- Status: Response pending (highlighted in yellow)
- Expected ask amount: (highlighted in yellow)
- Expected ask date: mm/dd/yyyy
- Expected fiscal year to close: mm/yyyy
- Ask date: mm/dd/yyyy
- Callout: With "Solicitation" stage selected, multiple "Status" options become available. Depending on your selected "Status" you will have corresponding date fields appear.

### 12.16 HOW TO ADD STEPS

To add steps to a plan (5.2), you will need to have saved your plan first. Once saved, you will be taken directly to the step page. Here you will click on the “Edit Steps” button.

**Planned and pending steps (1)** Edit steps Add step More

Status	Date	Start time	End time	Time zone
Pending	10/26/2018			

**Completed steps (1)** Add step More

Status	Date	Start time	End time	Owner	Objective
Completed	10/24/2018			Ornelas II, Mr. David A.	Solicitation Outr

## 12.17 ADDING A SINGLE STEP

To add a single step to a plan you will need to simply fill in the fields on the first line. At minimum, you will need to include Expected Date, Objective, Owner, Stage, Status (Note: each plan needs at least one Pending step, so if you only have one step, its status should be Pending), and Contact method.

Required fields when entering a step

To add a comment to your step, click here.

## 12.18 ADDING STEPS FROM A TEMPLATE

There are several templates in GAIL that provide steps and timelines for different types of plans. If you would like to use one of these templates as a guideline for your plan, simply select the specific template from the drop-down menu and click the "Add steps from plan outline" button. Remember that you must change the status on the first step to "Pending."

Select the appropriate plan outline

Remember to change the status of the first step to "Pending."

## 12.19 HOW TO CHANGE THE STEP STATUS

### 12.19.1 How to Change an Individual Step Status

To change the status of a single step within a plan, click the double chevron next to the plan status to reveal a gray bar menu. On this menu, select “Step” and then “Edit.”

The screenshot shows the 'Edit a step for Wilkerson, Mrs. Laura Catherine Ford 2008' dialog box. The 'Status' dropdown menu is open, showing options: Pending, Planned, Completed, Cancelled, and Declined. A red box highlights the 'Status' field, and a red arrow points to it with the text 'Change status here'.

### 12.19.2 How to Change the Status of Multiple Steps at Once

Click the “Edit steps” button next to the “Planned and pending steps” section header. Click the “Select all” button and then use the “Update status to:” drop down and choose the status you want to use to update the steps.

The screenshot shows the 'Edit steps for Wilkerson, Mrs. Laura Catherine Ford 2008 - CDPM - Test' dialog box. The 'Select all' button is highlighted with a red box. The 'Update status to:' dropdown menu is open, showing options: Planned, Pending, Completed, Cancelled, and Declined. A red arrow points to the 'Update status to:' dropdown with the text 'Update status to:'.

### 12.19.3 Utilize “Edit Next Step” Feature When Filing a Contact Report

When filing your Contact Report, under the “Comment” section of the form, you have the ability to update the next planned step to be your next pending step. Check the “Edit next step information” box and update the status from “Planned” to “Pending”.

The screenshot shows a form titled "Edit next step information" within a larger window. A red box labeled "Check this box" points to the "Edit next step information" checkbox, which is checked. Another red box labeled "Change status here" points to the "Status" dropdown menu, which currently shows "Planned". The form also includes fields for "Objective" (Check out the next planned step), "Owner" (Weimer, Ms. Holly C. Chavalla), "Expected date" (4/11/2017), and "Actual date" (mm/dd/yyyy). There are "Save" and "Cancel" buttons at the bottom right.

### 12.20 HOW TO ADD A SECONDARY MANAGER (WITHIN THE PLAN)

On your plan, navigate to the “Edit secondary manager” button under the Tasks bar on the left side of your screen. Search for the Fundraiser you wish to replace and enter the start date.

The screenshot shows the "Edit secondary manager" dialog box. On the left, the "Tasks" bar has "Edit secondary manager" circled in red. The dialog box contains a "Secondary manager" search field, "Start date" (mm/dd/yyyy), and "End date" (mm/dd/yyyy) fields. There are "Save" and "Cancel" buttons at the bottom right.


### 12.21 HOW TO REPLACE A SECONDARY MANAGER (WITHIN THE PLAN).

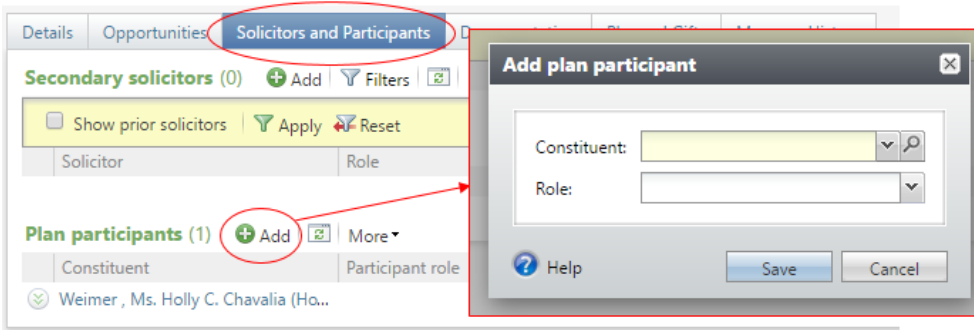
On your plan, navigate to the “Replace secondary manager” button under the Tasks bar on the left side of your screen. End date the current secondary manager. Search for the Fundraiser you wish to replace and enter the start date.

The screenshot shows the "Replace secondary manager" dialog box. On the left, the "Tasks" bar has "Replace secondary manager" circled in red. The dialog box is divided into two sections: "Current manager information" and "New manager information". The "Current manager information" section shows "Current manager: Roell, Mr. Christopher Adam (Adam) 2010", "Start date: 5/7/2021", and "End date: mm/dd/yyyy". The "New manager information" section has a "New manager" search field, "Start date: mm/dd/yyyy", and "End date: mm/dd/yyyy" fields. There are "Save" and "Cancel" buttons at the bottom right.




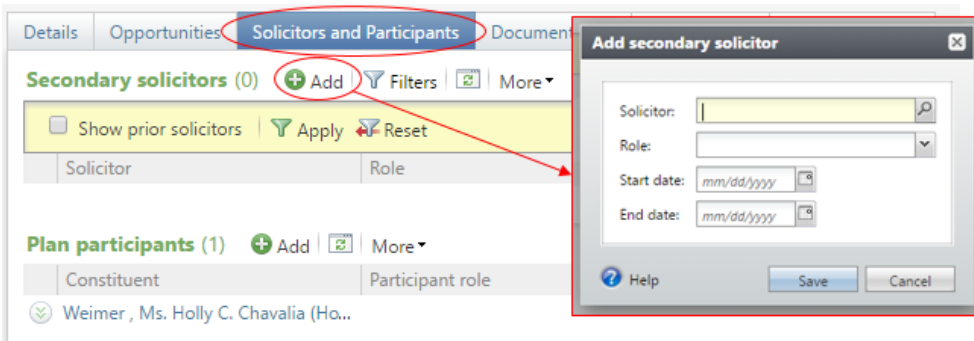
## 12.22 HOW TO ADD A PLAN PARTICIPANT (WITHIN THE PLAN)

On your plan, navigate to the “Solicitors and Participants” tab; click the  Add button under the “Plan participants” section.



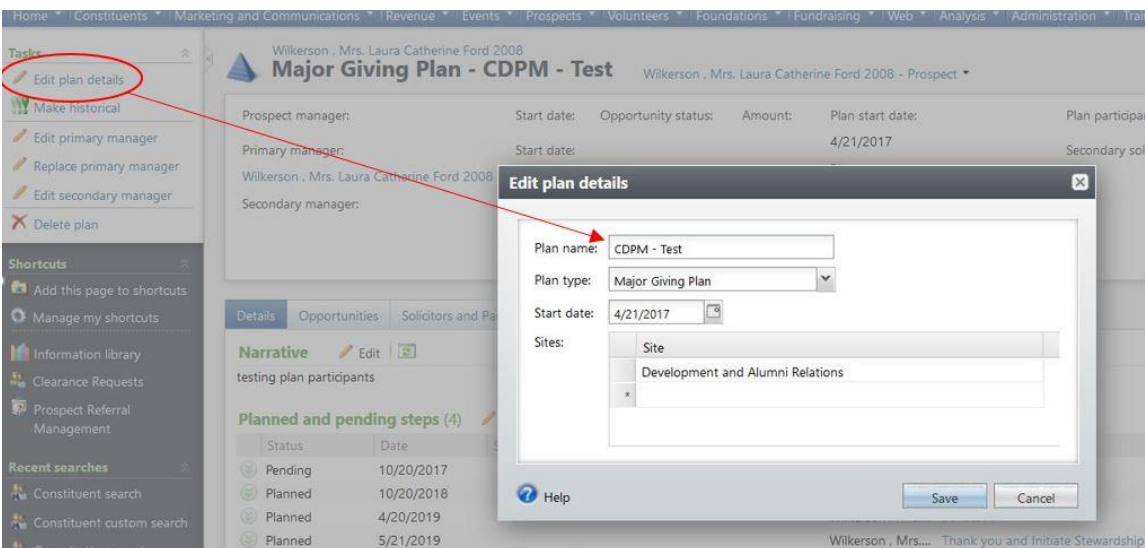
## 12.23 HOW TO ADD A SECONDARY SOLICITOR (WITHIN THE PLAN)

On your plan, navigate to the “Solicitors and Participants” tab; click the  Add button under the “Secondary solicitors” section.




## 12.24 HOW TO EDIT PLAN NAME AFTER PLAN HAS BEEN CREATED

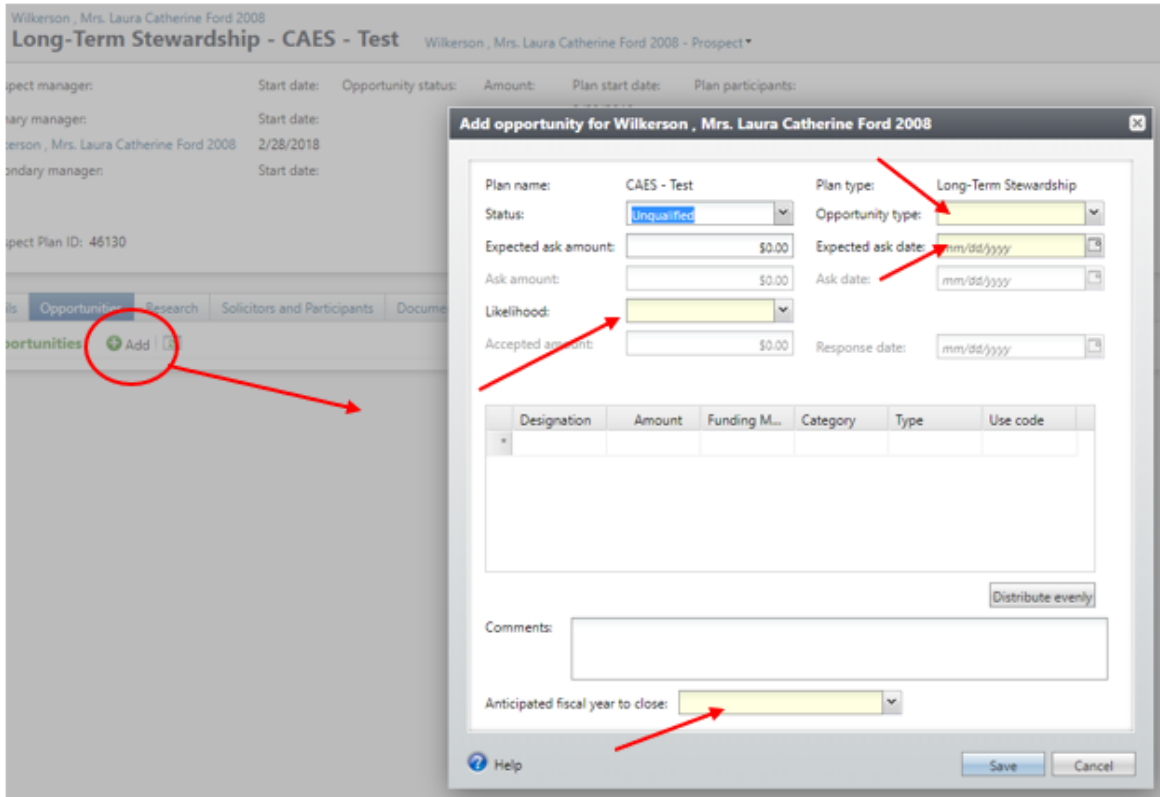
Inside the plan that you want to edit, on the left hand side of the screen, under the Task list, click the “Edit plan details” option.




## 12.25 HOW TO ADD AN OPPORTUNITY AFTER THE PLAN HAS BEEN CREATED

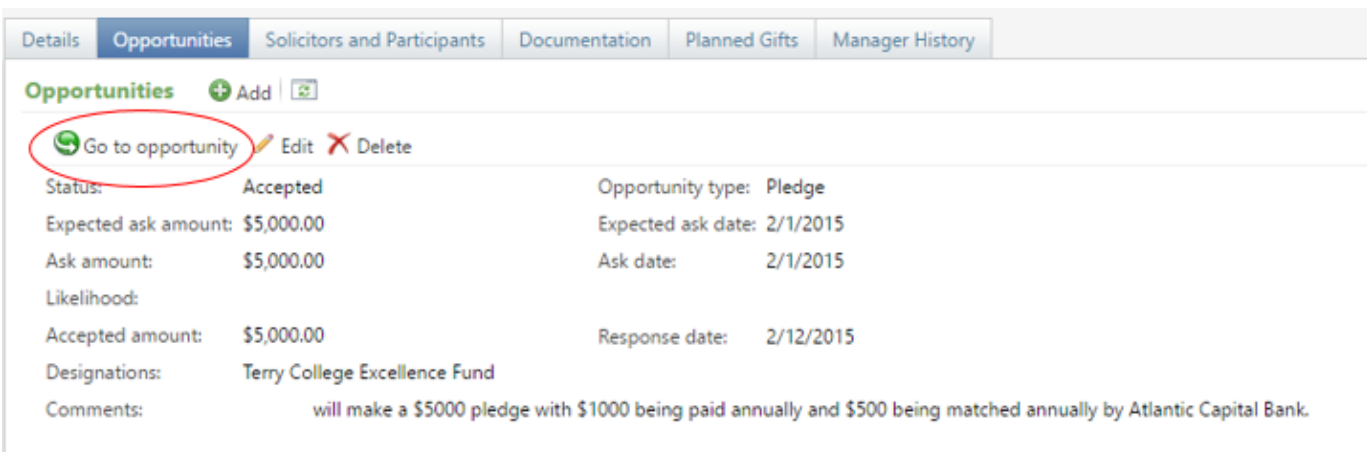
Navigate to the constituent's plan for which you want to attach the Opportunity (6.1). On the "Opportunities" tab, click the  Add button. The status should be one of: Qualified, Response Pending, Accepted, or Rejected. The yellow cells are required fields.

**NOTE:** Only after the Ask has been made should you include the Ask Date and Ask Amount. Designation shouldn't be populated until after the opportunity has been Asked.



## 12.26 HOW TO SEE IF REVENUE HAS BEEN ASSOCIATED TO AN OPPORTUNITY

Within the plan, click on the "Opportunities" tab, locate the specific Opportunity you are interested in viewing, and click on the  Go to opportunity button.



## Prospect Management Policies and Procedures

On the “Opportunity details” page, you can see the total amount of revenue committed.

Details		Associated Revenue	Naming Opportunities	Campaigns	Solicitors	Attributes	L.A.I.T. Scores
<b>Opportunity details</b>							
Status:	Accepted	Opportunity type:	Pledge				
Expected ask amount:	\$5,000.00	Expected ask date:	2/1/2015				
Actual ask amount:	\$5,000.00	Actual ask date:	2/1/2015				
Likelihood:		Response date:	2/12/2015				
Accepted amount:	\$5,000.00	Committed date:	2/19/2015				
Revenue committed:	\$5,000.00						
Total paid amount:	\$2,000.12						
Comments:	will make a \$5000 pledge with \$1000 being paid annually and \$500 being matched annually by Atlantic Capital Bank.						
<b>Designation (1)</b>							
Name	Amount	Funding Method	Category	Type			
Terry College Excellence Fund	\$5,000.00						

To view more detail about the committed revenue, click on the “Associated Revenue” tab. You can click on the hyperlinked dollar amount to see the transaction detail.

Details		Associated Revenue	Naming Opportunities	Campaigns	Solicitors	Attributes	L.A.I.T. Scores
<b>Associated revenue (49)</b>							
Type	Date	Amount	Balance	Constituent	Pay method		
Pledge	2/19/2015	\$5,000.00	\$2,999.88		credit card		

### 12.27 HOW TO FILL OUT A TRANSMITTAL FORM TO ENSURE THAT REVENUE IS ASSOCIATED WITH THE CORRECT PLAN AND OPPORTUNITY

On the normal Deposit Transmittal form (found at <https://dar.uga.edu/deposit/transmittals/add>), make sure to check the box for the “Add Matching, Tribute, Recognition Information, or Special Instructions”. In the box for “Special Instructions” include the Plan Name, Constituent Lookup ID, and Name of the Prospect (if not the same as the name on the check) with the appropriate opportunity.

Add Matching, Tribute, Recognition Information, or Special Instructions ☒

Matching Gift Details ?

Tribute Type ? (in honor of, in memory of, etc.) not a tribute

Tribute Information ?

Recognition Information ?

Special Instructions ?

Submit



## Prospect Management Policies and Procedures

On the next screen, if the revenue is to be associated with a plan and opportunity, ALWAYS selected the 'Y' radio button next to 'Is this associated with an opportunity?'. If the entity that gave the money is the one with the opportunity you can select the correct one in the drop down box. If the revenue is a Third Party gift (i.e. Family Foundation, Investment Fund, etc.), there will not be an opportunity to select. Make sure to include the Plan Name, Constituent Lookup ID, and Name of the Prospect with the correct opportunity in the special instructions box on the previous screen.

Asterisks (\*) indicate required fields.

Amount ? \*

Designation ? \*

Revenue Type ? \*

Is this a pledge payment? ? ☐ Y ☒ N / Not sure

Is this associated with an opportunity? ? ☒ Y ☐ N / Not sure

Opportunity

Back Continue

Logout | Clear Session | My Trans

Home | About Us | News | Giv

Leadership Annual Gift Plan - TCOB - PIVC Corporate Sponsorship - \$2,500.00 - 08/29/2017 - Terry College Professional Women's Conference Fund

Leadership Annual Gift Plan - FACS - Leadership Annual Gift to GICH - \$20,000.00 - 12/23/2016 - Georgia Initiative for Community Housing Fund


Campaign Principal Gift - CDFR - Campaign Principal Gift Plan - \$425,000.00 - 12/01/2016





Remember ☐

Batch


## 12.28 HOW TO ADD INTERACTIONS





### 12.28.1 Add Regular Interaction

Navigate to the constituent's page and on the "Documentation and Interactions" tab, click on the "Interactions" subtab. Click the  Add button.

Prospect	Contact	Personal Info	Relationships	Documentation and Interactions	Revenue	Attributes	Vanguard Images	Communications	Memberships	History	S
<b>Interactions</b> (9)  Add Step and Interaction  Add  Filters  More											
Date	Start time	End time	Time zone	Status	Owner	Summary	Contact method				
3/22/2019				Canceled	Wilkerson, Mrs. ...	Thank you and Initiate Stewardship Plan	Task				
2/19/2019				Canceled	Wilkerson, Mrs. ...	Solicitation	Task				

### 12.28.2 Add Step and Interaction

Navigate to the constituent's page and on the "Documentation and Interactions" tab, click on the "Interactions" subtab. Click the  Add Step and Interaction button.

Prospect	Contact	Personal Info	Relationships	Documentation and Interactions	Revenue	Attributes	Vanguard Images	Communications	Memberships	History	S
<b>Interactions</b> (9)  Add Step and Interaction  Add  Filters  More											
Date	Start time	End time	Time zone	Status	Owner	Summary	Contact method				
3/22/2019				Canceled	Wilkerson, Mrs. ...	Thank you and Initiate Stewardship Plan	Task				
2/19/2019				Canceled	Wilkerson, Mrs. ...	Solicitation	Task				

## 12.29 FILE CONTACT REPORT

Navigate to the plan for which you wish to add a contact report; if it is a step listed on the plan that is being completed (pending or planned), click on the double arrows and select the “+ Contact report” button.

The screenshot shows the 'Planned and pending steps' section of the GAIL interface. The table lists steps with columns for Status, Date, Start time, End time, Time zone, Owner, and Objective. A red circle highlights the '+ Contact report' button next to a pending step. Below the table, there are buttons for 'Write a letter' and 'Step'.

Status	Date	Start time	End time	Time zone	Owner	Objective
Pending	10/20/2017				Wilkerson , Mr...	Qualification
Planned	10/20/2018				Wilkerson , Mr...	Cultivation
Planned	4/20/2019				Wilkerson , Mr...	Solicitation
Planned	5/21/2019				Wilkerson , Mr...	Thank you

## 12.30 EXAMPLE OF A PROPER MEETING ENTRY

A proper meeting interaction entry should include the meeting participants, location, relationship info, personal details (family, kids, etc.), giving ability/inclination, next steps, and detailed overview of the conversation. When writing your meeting interaction, keep in mind that Interactions should help other people who read this interaction (i.e. future Plan Managers or Prospect Managers) understand the basic premise of that specific meeting.

### Note: Subcategory and Location:

- If entering a Campus assist or Collaboration meeting, select the Category *Prospect Management* and the the Subcategory *Campus assist* or *Collaboration*.
- If the meeting took place virtually, select the Location as *Other*, then enter *Virtual meeting* in the Other Location field.

The screenshot shows the 'Detail' form for a meeting entry. The form includes fields for Objective, Owner, Stage, Status, Expected date, and Actual date. There is a 'Comment' section with sub-sections for Location of Meeting, Purpose, Details of Gift/Plan, Highlights of Meeting, and Personal Details. There are also sections for Additional solicitors and Interaction.

## 12.31 REFERRALS FROM ADVANCEMENT RESEARCH

### 12.31.1 Receiving a Referral in GAIL

Once a referral has been made by a member of the Advancement Research team, you will receive an automated message alerting you about the new referral. This email will contain hyperlinks to GAIL, where you will be able to accept or reject the referral (10.2.1).

## Prospect Management Policies and Procedures

**Note:** A referral must be accepted or rejected within a 10-day time frame.

From: [laurahix@uga.edu](mailto:laurahix@uga.edu) [mailto:[laurahix@uga.edu](mailto:laurahix@uga.edu)]  
Sent: Thursday, April 13, 2017 9:11 AM  
To: Holly Chavalia Weimer <[hcweimer@uga.edu](mailto:hcweimer@uga.edu)>  
Subject: Prospect Referral

Holly C. Weimer,

You have received a prospect referral from Laura A. Hix for Jones (128366). Please review the following information and follow the link in this email to your personal My Referrals page. From this page you will be able to **accept or reject your referral within 10 days**. If you accept this referral, Prospect Management will enter a Suspect Qualification Plan on your behalf that will list you as the primary manager. This qualification plan will be visible on your My Fundraiser Page and will allow 90 days for you to qualify this suspect. If no response is given after 10 days, Research will re-refer this prospect due to inactivity. If you have any questions about this referral, please contact Laura A. Hix.

Please **accept or reject** this referral by: 4/23/2017.

When you click on the “accept or reject” hyperlink, you will be taken to your “My Prospect Referrals” tab to review your referrals. On this tab you will be able to see the prospect’s name, referral status (pending, accepted, rejected), the Researcher who made the referral, and the due date for action on the referral.

Home \* Constituents \* Marketing and Communications \* Revenue \* Events \* Prospects \* Volunteers \* Foundations \* Fundraising \* Web \* Analysis \* Administration \* Training and Support \*

**Weimer, Ms. Holly C. Chavalia (Holly) - Fundraiser**

760 Weeping Willow Dr.  
Athens, GA 30605-7076  
(478) 804-2086  
[aweimer@uga.edu](mailto:aweimer@uga.edu)

Requested amount: \$0.00

Spouse: Weimer, Mr. Aaron  
Household: Mr. Aaron Weimer and Ms. Holly C. Weimer

Position title: Development Analyst III  
Position site: Annual Giving

Start date: 9/19/2016

Pending Activity | Prospects and Plans | **My Prospect Referrals** | Plans | Planned Step Summary | Completed Step Summary | Prospect Summary | Opportunities / Asks | Opportunity Pyramid | Campaigns

Prospect Referrals (4) | Filters | More

Due Date	Referred To	Researcher	Prospect	Prospect Lookup ID	Director	Referral Type	Referral Status	Provisional
----------	-------------	------------	----------	--------------------	----------	---------------	-----------------	-------------

Once the Referral plan has been accepted the assigned RPM Liaison will activate the new Suspect Referral Plan and pending steps. Initial outreach attempts should be completed within the first 60 days, and an initial meeting completed 150 days, if not, the plan will be made historical.

**Major Giving Plan - CDMG - Suspect Referral Plan**

Prospect manager: [ ] Start date: [ ] Opportunity status: [ ] Amount: [ ] Plan start date: 4/30/2021 Plan participants: [ ]  
Primary manager: [ ] Start date: 4/30/2021 Plan stage: [ ] Secondary solititors: [ ]  
Secondary manager: [ ] Start date: [ ] Qualification: [ ] Site: [ ]  
Development

Prospect Plan ID: 60816

Details | Opportunities | Solicitors and Participants | Documentation | Planned Gifts | Manager History | Plan Dashboard | Research | Attributes

**Narrative** | Edit | [ ]

From the plan start date, we want to see outreach attempts in 60-days. If not, the plan will then be expired and made historical.  
From the plan start date, we want to see an initial meeting in 150-days. If not, the plan will then be expired and made historical.

If the prospect is not a MGP, the DO will need to provide a reason within a completed step on the plan and alert prospect management that they are not a prospect.

For more information regarding this suspect, please refer to the Research tab found on the constituent's record or within the Suspect Referral Plan.

**Planned and pending steps (4)** | Edit steps | Add step | [ ] | More

Status	Date	Start time	End time	Time zone...	Owner	Objective
Pending	6/29/2021				[ ]	Initial Outreach
Pending	6/29/2021				Ornelas II, Mr. David A.	Prospect Management Review - Make Plan Historical if No Outreach
Pending	9/27/2021				Ornelas II, Mr. David A.	Prospect Management Review - Make Plan Historical if No Initial Meeting
Pending	9/27/2021				[ ]	Introductory Meeting

## 12.32 RESEARCH REQUESTS IN GAIL

### 12.32.1 Research Requests Tab

To view pending Research Requests or to enter a new Research Request in GAIL, you will need to navigate to the “Research Requests” tab on your My Fundraiser Page.

The screenshot shows the GAIL system interface for a user named Weimer, Ms. Holly Chavalia (Holly). The profile includes personal information, primary relationships, addresses, and contact information. The 'Research Requests' tab is highlighted in the navigation bar. Below the navigation bar, there is a section for 'Research requests (0)' with filters for status, request date, and sites. A table with columns for Request ID, Due date, Status, Record type, and No. prospec is visible.

### 12.32.2 Adding a Research Request

By clicking the “Add” button, you will be able to add a new research request on a prospect.

**Note:** Research Requests on unrelated individuals must be submitted on separate request forms. However, research on spouses should be requested using the same form.

The screenshot shows the 'Add a prospect research request' form. The form includes fields for Status, Record type, Prospects to research, Priority, Due date, Research type, Request reason, Requested by, Submitted by, Sites, and Notes. Annotations provide additional instructions:

- A red box points to the 'Add' button in the 'Research requests (0)' section.
- A red box points to the 'Prospects to research' field with the text: "All blank fields should be filled in by the DO."
- A red box points to the 'Due date' field with the text: "The default due date is two weeks from request date, however the DO may change this as needed."
- A red box points to the 'Notes' field with the text: "If you would like to include additional information about the reason for or urgency of this request to the Advancement Research team, please include that information here."

## Prospect Management Policies and Procedures

### 12.32.3 Checking on Your Research Request

You will be able to view your requests on the “Research Requests” tab of your My Fundraiser Page. The information included will be the request ID# assigned to the request, due date, status (pending, in progress, completed), research type (prequalification, financial brief, bio, comprehensive, etc.) and the Development Analyst working on the request.

Request ID	Due date	Status	Record type	No. prospects	Research type	Researcher	Sites
1367	10/18/2016	Completed	Individual	1	Prequalification	Miller, Ms. Aubrey (Aubrey) 2005	Environment & C
1339	9/16/2016	Completed	Individual	1	Prequalification	Hix, Ms. Laura Anne Eastall (Laura...	Environment & C

### 12.32.4 Retrieving Your Research Request

To view a completed Research Request, click on a blue Request ID within the “Research Requests” tab.

Request ID	Due date	Status	Record type	No. prospects	Research type	Researcher	Sites
1367	10/18/2016	Completed	Individual	1	Prequalification	Miller, Ms. Aubrey (Aubrey) 2005	Environment & C
1339	9/16/2016	Completed	Individual	1	Prequalification	Hix, Ms. Laura Anne Eastall (L...	Environ
1332	9/12/2016	Completed	Individual	1	Prequalification	Cox, Ms. Hayley Diane 2009	Environ

After you click on your Request ID, select the blue “Documentation” tab, click on the double chevron next to the word “Attachment,” and click on the blue hyperlinked file name.

Documentation type	Date	Type	Title
Attachment	8/6/2014	Completed Prospect Profile	Completed Prospect Profile.pdf

**Note:** Your file will be password protected with a unique password for your site. When you receive an email from Research that your request has been completed, you will receive this password.

### 12.33 HOW TO PULL THE CUSTOM INTERACTIONS REPORT

Under the “Analysis” tab, navigate to the “Prospect management reports” section. Under the “Custom reports” header, click on the “CDMG – Interactions report” link.

Analysis	Administration	Training and Support
Reports		
Custom reports		
Constituent reports		
Fundraising reports		
Appeal reports		
Prospect management reports		
Event reports		
Volunteer reports		
Marketing reports		



## Prospect Management Policies and Procedures

Use the filters to pull specific information. Once the filters are set, click the “View Report” button to populate your interactions report. Report shows: Lookup ID, Name, City/State, Date, Summary, Contact Method, Plan Type, Owner Name, if it was an interaction, if a contact report was submitted, and the comment.

Lookup ID	Name	City/State	Date	Summary	Contact Method	Plan type	Owner/Name	Interaction	Contact
		Athens, Georgia	4/14/2017	Visit to discuss wording for scholarship	Return Meeting	Prospect plan	Jennifer W. Abbott	Yes	Yes

### 12.34 HOW TO VIEW DEVELOPMENT OFFICER ACTIVITY REPORT

Under the “Fundraising” tab, navigate to the “Custom reports” header, click on the “Development Officer Activity Report” link. The report is refreshed hourly (8-5) on weekdays and can be accessed at any time.

Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Volunteers | Foundations | Fundraising | Web | Analysis | Administration | Training and Support

**Fundraising**

- Designation search
- Purpose search
- Campaign search
- Donor challenges
  - Donor challenge search
  - Add a donor challenge
  - Update donor challenges
- Workspaces
  - Development workspace
- Naming opportunities
  - Naming opportunity search
  - Add a naming opportunity
- Customizations
  - Fundraising Units
  - Gratitude Recipients
- Custom reports
  - \$10K Donors for Unit
  - Campaign Progress Report
  - Development Detail
  - Development Officer Activity Report**
  - Development Officer Progress to Goals
  - Major Gift Impact Report
  - Pledge Reminders Report
  - Team Fundraising Totals
  - Weekly Fundraising Report
- Reports
  - Naming Opportunities

### 12.35 DRILLING DOWN IN THE DEVELOPMENT OFFICER ACTIVITY REPORT

Find and click your name. The list is sorted by Development Officer last name. The drill down will show detail for Solicitor Revenue, Major Giving Asks, and Interactions.

## Prospect Management Policies and Procedures

Development Officer Activity Report										
Team Name (Multiple values)	Last Month			FY 2021						
Fundraiser	LM Meeting #	LM Other Interaction #	LM Ask #	Meetings	Other Interactions	Top 10 Meeting	Qualification	Collaborations	Count of Asks	Solicitor Credit
Abdulla, Ms. Siara Swan 2004	0	0	1	0	14	0	0	0	3	\$334,500
Allen, Ms. Shirley M. Moore 2018	18									300
Arnold, Ms. Katherine Niles Howard (Kate) 202..	0									300
Baines, Ms. Sarah Jordan Simpson (Sarah) 1997	9									367
Bangle, Mrs. Kathleen Reid (Kathy)	0									300
Barrett, Mr. Johnathon Scott (Johnathon)	2									192
Bell, Mr. Robert Bradford (Brad) 2011	11									318
Blaine, Mr. Jan Rives	14									475
Brookey, Mr. Brian Robert 2022s	12									300
Burkett, Mr. Jonathan A. (Jon)	10									344
Burruss, Mrs. Andrea Malcom Ruark 1997	14									305
Carrico, Mr. Robert Lee (Rob)	1									594
Carter-Tidwell, Ms. Lindsay L.	12									346
Chapas, Mr. Shaun Mitchell (Shaun) 2010	5									312
Chesnutt, Mrs. Allison Louise Lumpkin 2004	1									365
Cochran, Mr. Jeffrey Brandon (Brandon)	16	91	4	198	1,359	17	79	25	35	\$1,379,171
Cook, Mr. Michael Andrew (Mike) 1998	10	15	6	114	189	12	36	81	49	\$14,407,523
Cook, Mrs. Sara Ann Schwartz (Sara) 1998	9	12	0	115	196	20	20	34	18	\$4,644,185
Craig, Mrs. Amanda Michael Clower	3	13	0	88	300	3	67	12	9	\$464,300

If you would like to subscribe to this report, click Subscribe at the bottom of the page.

189	12	36	81	49	\$14,407,523
196	20	20	34	18	\$4,644,185
300	3	67	12	9	\$464,300

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Cancel

Subscribe

Subscribe

DisableTemp

BOR Account Status

Every morning at 10:15AM

First day of the month

Manual Subscription Run for Enrollment Comparison Reports

Monday morning at 10:15AM

Monthly on the 10th

Monthly on the 15th

Test Sub

Testing Subscriptions (manual run)

Tuesday morning at 10 am (Grad School Tuition Waiver Report)

Every morning at 10:15AM

Cancel

Subscribe

63

## 12.36 HOW TO SORT PLANS USING FILTERS ON YOUR MY FUNDRAISER PAGE

Under the “Prospects and Plans” tab of your My Fundraiser Page, click the “Filters” button to reveal the yellow filters bar. In this bar, you may select the criteria to filter your plans. Once you have selected your desired criteria, click “Apply” to see your list.

## 12.37 HOW TO DETERMINE IF REVENUE HAS BEEN ASSOCIATED WITH A PLAN VIA PROSPECT EMAIL ALERTS

If you configure your UGA Email Alerts in GAIL to receive emails about revenue committed by your prospects, you will be able to see if that revenue has been associated with a plan. On that daily digest there is a field called ‘Associated Plan Name’, if this is blank the contribution has not been connected to a plan. If it is populated, that is the name of the plan that has the revenue tied to it.

Prospect Last Name/Company Name:

Gift Amount: \$10.00

Gift Site: Development and Alumni Relations

Gift type: Payment/Donation

**Associated Plan Name:**

Transaction Page: [https://crm.gail.uga.edu/bbappfx\\_gail/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pageId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=cd28a381-095d-4d4a-a016-1e4d25e0f3ab](https://crm.gail.uga.edu/bbappfx_gail/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pageId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=cd28a381-095d-4d4a-a016-1e4d25e0f3ab)

Prospect Last Name/Company Name: :

Gift Amount: \$50,000.00

Gift Site: Business

Gift type: Payment/Pledge

**Associated Plan Name: TCOB - Principal Gift Plan**

Transaction Page: [https://crm.gail.uga.edu/bbappfx\\_gail/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pageId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=57e4929d-2a9b-4545-bd92-a5cdd5bc6228](https://crm.gail.uga.edu/bbappfx_gail/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pageId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=57e4929d-2a9b-4545-bd92-a5cdd5bc6228)



## Prospect Management Policies and Procedures