The University of Georgia
Office of Prospect Management
Policies and Procedures

Last Updated August 2025

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1 OVERVIEW OF PROSPECT MANAGEMENT AND CORE FUNDRAISING VALUES

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

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 always in their portfolio and to manage prospects according to the supervisor’s 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 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. Recommendations for portfolio size are broken down below:

- Principal Gift portfolio: Maximum of 50
- Major Gift portfolio: Maximum of 100 with a Qual Pool of 20 (10 in requalification)
- Major Gift Supervisor portfolio: Maximum of 60 with a Qual Pool of 10

The prospects in a Major Gift Officer’s portfolio 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.

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 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 Qlik – Development Officer’s Activity Report

Development Officers can access their portfolio breakdown in the Qlik Development Officers Activity Report (https://uga-fad.us.qlikcloud.com), then locate the Portfolio Details sheet and select their name in the left column dropdown. From here, a Development Officer can see their full portfolio, working portfolio (a prospect you have a plan and realized opportunity on), and qual pool (a prospect you have a plan on that either (1) does not have an opportunity on the plan or (2) has an opportunity that is accepted, rejected, or canceled).

2.2.3 "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 any new prospects that have been assigned that day (12.9.1~~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 whose plans have been made historical but may still need to be involved with the school, board, or committee members, etc.) (12.9.2~~12.10.2~~ and 12.9.3~~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 made historical. 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 an original plan made historical, and the new Development Officer will create a new plan.

2.4 PROSPECT CONSTITUENCY

For a fundraiser to add a constituent to a portfolio, the record must first be assigned the Prospect Constituency (12.11~~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 $50,000 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, 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, 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 estimates.

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, 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 on 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

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, their supervisor, and the Prospect Management team partnering together. Prospect Management can offer supporting data entry if requested (**Error! Reference source not found.**~~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

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 consider 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 is responsible for managing a specific fundraising plan on a prospect. The duties of 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 (12.22~~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 (12.10~~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 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 Business Engagement and Foundation Relations team will generally manage these relationships. In most 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 Business Engagement 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.

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 the 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 the 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.") If a Development Officer is the Prospect Manager on a prospect and makes all active plans historical with no new plan created, then it is best practice that they are removed as Prospect Manager at that time.

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 of having 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

Once revenue has been committed, an opportunity can be made historical. If the Development Officer(s) plan is to continue to solicit for another gift with the same plan partners, a new opportunity should be added to the plan, with pending Stewardship steps being added until they are ready to move into Qualification or Cultivation.

If the Development Officer wants to work on a new gift with different plan partners, then the plan can be made historical and a new plan created.

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

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 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. The 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 (12.12~~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 (12.11~~12.12~~).

4.1.1 Major Giving Plan

A Major Giving Plan in GAIL provides a documented strategy to cultivate and solicit a major gift of at least $50,000 from a prospect.

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

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 $1,500 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. Prospect Management will check in with the Development Office throughout the life of the plan.

When entered by Prospect Management, Major Gift Plans will be titled "(site naming convention) – Suspect Referral Plan" and contain the following outline:

Objective	Role	Days from Start	Contact Method
Outreach Attempt	DO	30	Email
Outreach Attempt	DO	60	Phone
Outreach Attempt	DO	90	Email
Outreach Attempt	DO	120	Phone
CDPM - Initial Review	PM	60	Task
CDPM - 2nd Review	PM	120	Task
CDPM - Final Review - Make Historical?	PM	180	Task
Introductory Meeting	DO	150	Initial 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 Prospect Management Team uses the "4-2-2 Method" to evaluate suspect referral plans. This includes 4 outreach attempts using 2 different contact methods over 2 quarters (180 days).

The Development Officer is expected to qualify the prospect within 180 days of the plan's start date. If the Development Officer disqualifies the referral, then a step should be completed with details as to why this prospect is not a viable major gift prospect. The Development Officer's Prospect Management Liaison should be notified via email so the plan can then be made historical.

- An outreach attempt must happen within the first 60 days from the plan start date or risk having the plan made historical.
- Initial meeting should be scheduled within the first 150 days from the plan start date or risk having the plan made historical.
- Once a meeting has occurred, PM will come off the plan, change the plan name, and archive the referral.

4.2.3 Overdue Suspect Referral Plans

If no outreach attempts have been made or the Development Officer has not been able to gain contact with the prospect using the 4-2-2 method 180 days after the plan's start date, Prospect Management may choose to make the Suspect Referral Plan historical and potentially reassign the referral to a different Development Officer if the prospect was not disqualified.

4.2.4 Requesting Extensions on Suspect Referral Plans

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

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 (12.14~~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	**Pending:** 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. **Planned:** 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." **Completed:** After you have completed a step, make sure to change its status to "completed."

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 (12.18.1~~12.19.1~~) or by utilizing the "Edit next step" section (12.18.3~~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 that will benefit from and/or work 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 stages 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.

Stage	Duration	
5.5.1 Qualification	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.
5.5.2 Cultivation	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.
5.5.3 Solicitation	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: • if the ask was accepted, the opportunity can be made historical, and the plan can move into Stewardship if needed. • if the ask was rejected, the opportunity should be made historical, and the plan move back into Cultivation if appropriate. **Note:** Plans and/or opportunities should not be made historical until all revenue, including matching gifts, has been committed.
5.5.4 Stewardship	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: •make the opportunity historical and start a new future opportunity OR make the plan historical and add prospect to 'Prospect Of' group.

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.

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 that 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 (12.21~~12.22~~).

5.8 PLAN ATTRIBUTES

Attributes can be added to a plan for the purpose of querying. The following attributes can be added:

- DXO – Annual Giving
- Foundation Relations – SPA
- Principal Gift Prospect
- RPM – Suspect Referral
- Sales and Service
- Will include a planned gift discussion

6 OPPORTUNITIES

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 (12.24~~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, Likelihood, and Expected Close Amount indeed may be “guesswork” 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.

Qualified*	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", "Expected Close Amount" and "Anticipated Fiscal Year to Close" are also required to be entered on qualified opportunities.
Response Pending*	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", "Anticipated Fiscal Year to Close", and "Ask Amount" should be updated.
Accepted*	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.
Rejected	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."
Canceled	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.
Unqualified	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 receive solicitor credit when applicable.

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	***$1,500***	When soliciting a Leadership Annual Gift, $1,500 is the suggested minimum opportunity amount that should be entered.
Major	***$50,000***	The minimum threshold for a Major Gift at The University of Georgia is $50,000. All plans with expected ask amounts below $50,000 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 the 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 the 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.

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 Expected Close Amount

The "Expected Close Amount" is the amount a fundraiser believes the gift will actually close. If a fundraiser is "asking to capacity" but does not believe the gift will close at that amount, this field would be different than the "expected ask amount." A suggested practice is to use $1 in this field if you believe the Development Officer has very low confidence of the gift closing at all or the Development Officer is uncertain of this amount at the time.

6.2.11 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 MULTIPLE OPPORTUNITIES

Multiple opportunities can be added to a plan. Once an opportunity has revenue committed or has been rejected, the opportunity can be made historical and a new one added if appropriate.

Note: An exception occurs if the primary, secondary, or secondary solicitor changes between opportunities. If a fundraiser begins another ask working with new fundraising partners.

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

6.4 MAKING AN OPPORTUNITY HISTORICAL

Once revenue has been committed on an opportunity, the opportunity can be made historical. This can be done by adding the Historical attribute or by clicking the "Make Historical" shortcut in the left sidebar on the opportunity page of the plan.

6.5 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 (12.26~~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 or Zoom 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 (12.29~~12.30~~).

Please see FAQs for answers to common questions about Meetings.

Location	The location should be as specific as possible – "John Doe's office at Chick-fil-a headquarters in Atlanta, GA."
Purpose	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.")
Summary	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.
Next Steps	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 meets 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.

Note: An “Initial Meeting” noted as a phone call undergoes a separate screening process prior to getting approved.

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 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 Stewardship.

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.

Campus Assist meetings with students/parents can count as a meeting if the parents are possible prospects. These will be reviewed by the Prospect Management team for approval.

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.
- Internal Collaboration (Campus Assist): For strategy interactions between campus partners, these can be entered with **Contact Method:** Task or Other, **Category:** Prospect Management, and **Subcategory:** Campus Assist.

Note: The Campus Assist sub-category should only be used when meeting with a campus partner OUTSIDE of your SCUD

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).

Note: A PLC event can count as a meeting only for the interaction on the host of the event. All others should be documented as an event interaction.

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. (11.24~~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 has 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, 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 related 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 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 (12.27.2~~12.28.2~~, 12.28~~12.29~~).

Interactions or contact reports can also be added by using the Zuri Plug-In app on Outlook. Advancement IT has a full tutorial in the DAR Knowledge Base on how to download and add the plug in for Outlook. (https://uga.teamdynamix.com/TDClient/3010/DAR/KB/ArticleDet?ID=167505)

This allows users to directly add an email interaction from Outlook into GAIL. Once you have added the plug in, you can access Zuri on your top ribbon in Outlook to file an interaction or a planned or unplanned contact report. Once you select one of these options, a search bar appears, type the prospect’s name or lookup ID you want the email to live under in GAIL, select the correct profile, complete the report, scroll down to the bottom, and select “File Interaction”. A planned contact report will fill out a pending interaction that already exists in GAIL, an interaction or unplanned contact report will add a new interaction into GAIL. This allows users to add these interactions without having to copy and paste an email into GAIL, entering the interaction as you send the email.

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 “Snapshot,” which is generally distributed by Prospect Management 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 completed during their audit review process to count. You can review your Pending and Action Needed interactions in your Interaction Review Tab (12.8~~12.9~~).

7.6.1 Development Officer Activity Report (DOAR)

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

The Activity Report transparently reports up-to-date activity by Major Gift Officers: meetings, other interactions, and major giving level asks ($50,000+). 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.

Note: The DOAR also reflects metrics for LAG officers and combined MG/LAG officers that have metrics entered in the GAIL system for that fiscal year.

8 PROSPECT MANAGEMENT TEAM STRUCTURE

8.1 STAFF MEMBERS

Prospect Management personnel include:

Nedra Newton-Jones, Executive Director of Prospect Management and Research
nedra11@uga.edu

Libby Shepherd, Director, Prospect Management
libby989@uga.edu

Karine Bauch, Prospect Management Specialist
karine.bauch@uga.edu

Alex Brown, Prospect Management Specialist
Alexandra.Brown@uga.edu

Andrew Hibbs, Prospect Management Specialist
ah22799@uga.edu

Tori Petefish, Prospect Management Specialist
tori.petefish@uga.edu

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 works 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 07/2025):

Prospect Management Policies and Procedures

Alex	Karine	Andrew	Tori	Libby
CAES: Jan **(Eliza)** - Mary Ann Parsons - Joey Lynn -Elizabeth Carlson -VACANCY **Engineering: Jan** **(Mary/Nedra)** - VACANCY - Jordan DeRosa -Michaela Collins **Ecology: Jan** **(Chelsea)** -Melissa Lee -Nano Serwich -VACANCY **4-H: Jan** **(Mary)** - Adam Hammond **CED: Brooks** **(Chelsea)** - VACANCY **Office of Instruction: Jan** **(Mary)** -Graff Wilson **Foundation Relations: Kyle T.** **(Ryan)** -Matt Pruitt -Mary Koon -VACANCY **OBE: Jill** **(Ryan)** -Kyle Tschepikow -Nic Laconico -Stacy Stanford -Heather Pearson -Allison Chesnutt -Amy Sweet **Parent Giving: Andrea** **(Heather)** -VACANCY - Eric Schmidt - Courtney Ayers - Meredith Glenn **Strategic Initiatives: Andrea** **(Heather/Nedra)**	**Franklin: Jan** **(Eliza/Nedra)** - Meredith Metcalf (Nedra) -DIR OF DEV - VACANCY - Aubrey Miller - Melissa Roberts -Kate Arnold -Abby Fuller -Hailee Talbot -VACANCY **COE: Jan** **(Ryan/Nedra)** - Molly Thomas - Robby Poister **Medicine: Jan** **(Heather/Nedra)** -Hudson Clare **Forestry: Kathy** **(Eliza)** - Bridget Harden **Pharmacy: Jan** **(Eliza/Nedra)** - Kate O'Reilly (Nedra) - Gordon Thomas **Vet Med: Brooks** **(Mary)** - Michelle Jones - Taylor Hicks -Ellen Sims -Mallory Moye -VACANCY **Terry: Brooks** **(Heather/Nedra)** ***- Ruth Seiler ***** - Andrea Burruss - Brandon Cochran - Kathy O'Bryan -Meghan Fernandez -Bennie Cohen	**GMOA: Brooks** **(Chelsea)** - Heather Malcom **Honors: Brooks** **(Ryan)** - Debbie Daniel **Journalism: Brooks** **(Ryan)** - Sara Cook **Law: Brooks** **(Heather)** - Jeremy Headrick - Gabby Dukes **Libraries: Brooks** **(Mary)** - Lee Snelling -Leandra Nessel **PAC: Brooks** **(Heather)** - Carlton Bain **SPIA: Brooks** **(Chelsea)** - Sarah Baines -Ryan Leonard **PSO: Brooks** **(Eliza)** - Anne Moser **BOTG: Brooks** **(Eliza)** - Johnathon Barrett **Social Work: Brooks** **(Mary)** - Megan Powell **Student Affairs: Brooks** **(Mary/Nedra)** -Carrie Truax -William Draper **Public Health: Brooks** **(Ryan)** - Faith Perry **FACS: JFACS: Jan** **(Eliza)** - Suzanne Griffeth **Forestry: Jan** **(Chelsea)** - Bridget Harden	**Planned Giving: Kathy O.** **Chelsea/Nedra)** -Mike Cook (Nedra) -Patrick Knowles -VACANCY -Zeb Brookshire **Regionals: Jeremy** ***Elizabeth Kozak*(Heather)** ***VACANCY (Chelsea)** -Chris Jefts **(Chelsea)** -Vince Thomas **(Chelsea)** - Rob Carrico **(Chelsea)** -VACANCY ***Michelle Versfeld** **(Mary)** **Development Officer Team** - Weldon Kolker -Madi Cox -Zack Robbins ***Michelle Rotondo** **(Mary/Nedra)** -Courtney Hart -VACANCY -Ali Elyaman -Matthew Brown (DO Team) ***Alysse Capitanelli** **(Ryan)** - Ellie Engquist - Chandler Boyle - Katie Adams - Christina Varnedoe -Kyle Bryson **Athletics: Jeremy (w/Libby):** **(Mary/Nedra)** - Ford Williams - Brad Bell - Travis Epling - Shaun Chapas -Blake Hirth -Mikayla Coombs - VACANCY	**UGA Development:** **(Nedra/Heather)** - Brooks McCommons - Jan Blaine **(Alex)** -Will Willimon -Andrea Parris - Jill Walton - Jeremy Ransom **Principal Gifts: Kathy O.** **(Heather/Nedra)** -Kathy Ortstadt - Lindsay Carter - Matt Mize **Annual Giving (DXO):** - Rachel Jordan **Athletics: Jeremy** **(Nedra/Devin)** - Ford Williams - Brad Bell - Travis Epling - Shaun Chapas -Blake Hirth -Mikayla Coombs - VACANCY **Alumni Relations: Jeremy** **(Nedra)** -Adam Roell -Kate Lantz -Mason Black -VACANCY -Kaylin Jones -Erica Lowman -Terrance Smith -Realenn Watters -Jennifer Johnson -Mary Beth Mallard

-Siara Abdulla -Jill Bateman				

9 PORTFOLIO REVIEW MEETINGS – LET ME

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 additional staff. Directors’ supervisors are also welcome to participate in the meeting, but are not required.

Note: If a Director would like 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 that 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, prospects to qualify, and Research support such as travel plans and prospecting needs. 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 the 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
10. "Response Pending" opportunities
11. Prospect strategy discussion: This provides us with time to discuss any prospects the fundraiser has brought to the meeting to strategize with their supervisor as well as their PM and Research liaisons on ways to move the prospect forward.
12. Any questions that the Development Director may have for the Prospect Management Team

10 PROSPECT RESEARCH

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

10.1 INTRODUCTION

Prospect 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 Prospect Research's products or services, contact Director of Prospect Research, Heather McCauley (heather.mccauley@uga.edu).

10.2 PROSPECT 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
  - Curating lists designed to aid with upcoming events, travel, and due diligence

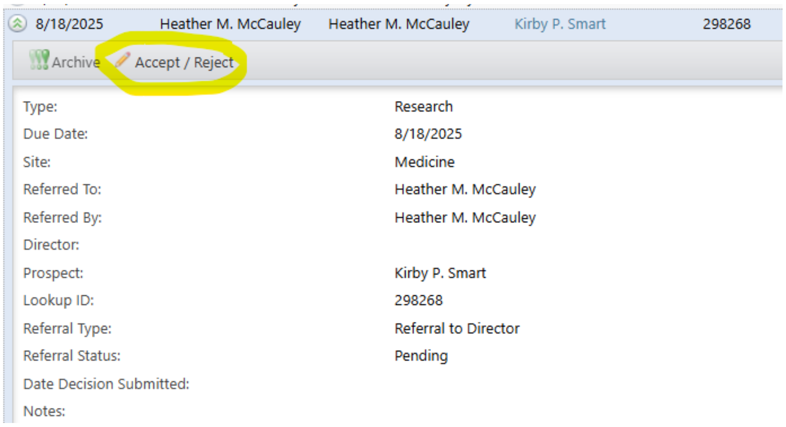
10.2.1 Referral Tracking System

One of the most crucial ways the Prospect 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 (12.30~~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.

10.2.2 Assigning Referrals to Team Members

If you are the Director or Development Coordinator of your team, you may assign a referral to one of your team members. Under your Prospect Referrals Tab, you can review your referrals. When clicking Accept/Reject, you will have the opportunity to type a team members' name in the text box. When you press Save, this referral will automatically send to that team member.



8/18/2025 Heather M. McCauley Heather M. McCauley Kirby P. Smart 298268

Type:	Research
Due Date:	8/18/2025
Site:	Medicine
Referred To:	Heather M. McCauley
Referred By:	Heather M. McCauley
Director:	
Prospect:	Kirby P. Smart
Lookup ID:	298268
Referral Type:	Referral to Director
Referral Status:	Pending
Date Decision Submitted:	
Notes:	

11 Frequently Asked Questions

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 (12.9.2~~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 (11.20~~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 (12.11~~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 (12.23~~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?

Multiple opportunities can be added to a plan. Once an opportunity has revenue committed or has been rejected, the opportunity can be made historical and a new one added if appropriate. An exception occurs if the primary, secondary, or secondary solicitor changes between opportunities. If a fundraiser begins another ask working with new fundraising partners (6.4.).

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 been 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 (12.36~~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. (12.26~~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 (12.25~~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?

Yes. Plans can be made historical, or an individual Opportunity can be added within a plan.

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 reference the Qlik Development Officer Activity Report on the Interactions Details sheet.

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 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 "fix it" reports addressing data integrity will be sent by the Prospect Management Liaison on a bi-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, **Error! Reference source not found.**~~9.1.4~~).

Qlik can be a great resource for fundraisers to access reports based on what has been entered into GAIL. Within Qlik, fundraisers have access to the following apps in the DAR-GAIL space: DOAR, Pledge Analysis, Fix it File, Donor Quadrants, Prospecting Tool, and more. Each app focuses on specific reporting for related information pulled from GAIL. Qlik refreshes automatically every morning and cannot be manually refreshed, meaning any work done in GAIL will not be reflected in Qlik reports until the following morning. Each app and sheet can be sorted by fundraiser to reflect only their related information.

We encourage fundraisers to attend the Monthly Dashboards meeting that is hosted by Danielle Free for any Qlik updates or related questions.

PM collection in Qlik: https://uga-fad.us.qlikcloud.com/analytics/collections/687a405045a573c7380ad4b9

11.20 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).

- If you need any information on a constituent's record updated, contact Records (records@uga.edu).
- If you have questions about how to complete specific tasks in GAIL, contact The Office of Client Services (askit@uga.edu).
- 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 Director of Prospect Research, Heather McCauley (heather.mccauley@uga.edu).
- If you have a question about revenue being correctly tied to an Opportunity, contact your Senior Director for Constituent Programs (Brooks McCommons, Kathy Ortstadt, or Jan Blaine) and/or your RPM Liaison (8.1).

11.21 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.

11.22 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.

11.23 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 reach out to 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.

11.24 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.

11.25 What is considered a significant activity?

Significant activity refers to an interaction that is one of: email, phone, initial meeting, or return meeting.

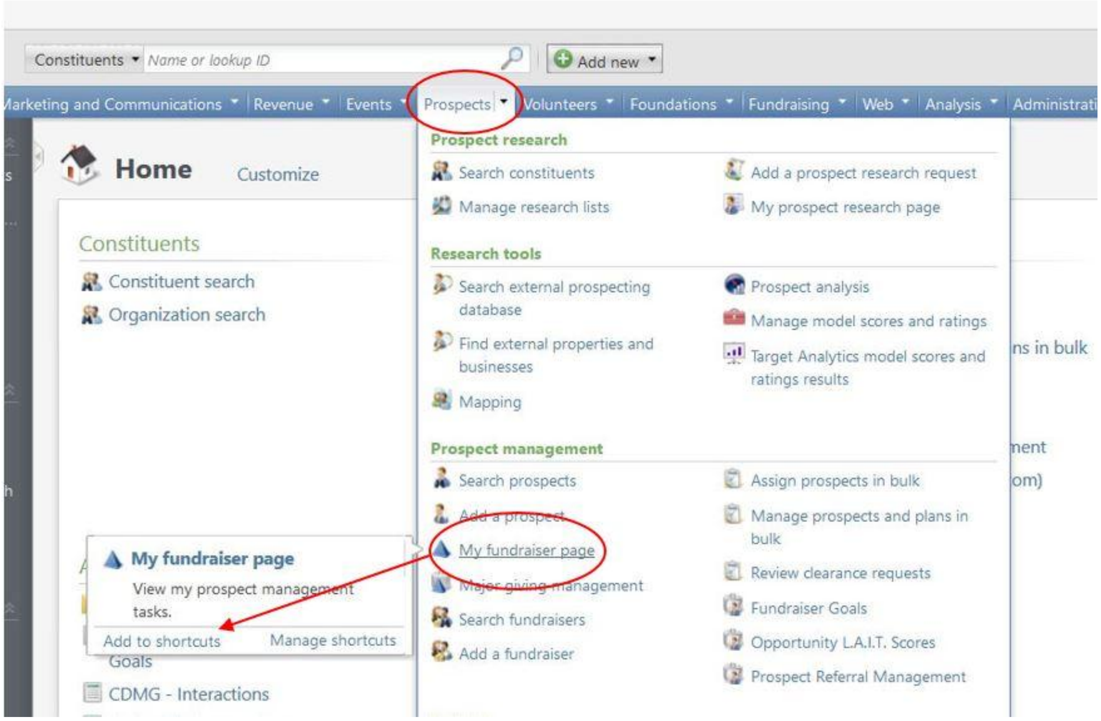
11.26 What is a University Top Prospect Group?

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.

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.


Constituents
Name or lookup ID
Add new
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
Administrati
Home
Customize
Constituents
Constituent search
Organization search
Prospect research
Search constituents
Add a prospect research request
Manage research lists
My prospect research page
Research tools
Search external prospecting database
Prospect analysis
Manage model scores and ratings
Find external properties and businesses
Target Analytics model scores and ratings results
Mapping
Prospect management
Search prospects
Assign prospects in bulk
Add a prospect
Manage prospects and plans in bulk
My fundraiser page
Review clearance requests
Major giving management
Fundraiser Goals
Search fundraisers
Opportunity L.A.I.T. Scores
Add a fundraiser
Prospect Referral Management
My fundraiser page
View my prospect management tasks.
Add to shortcuts
Manage shortcuts
Goals
CDMG - Interactions
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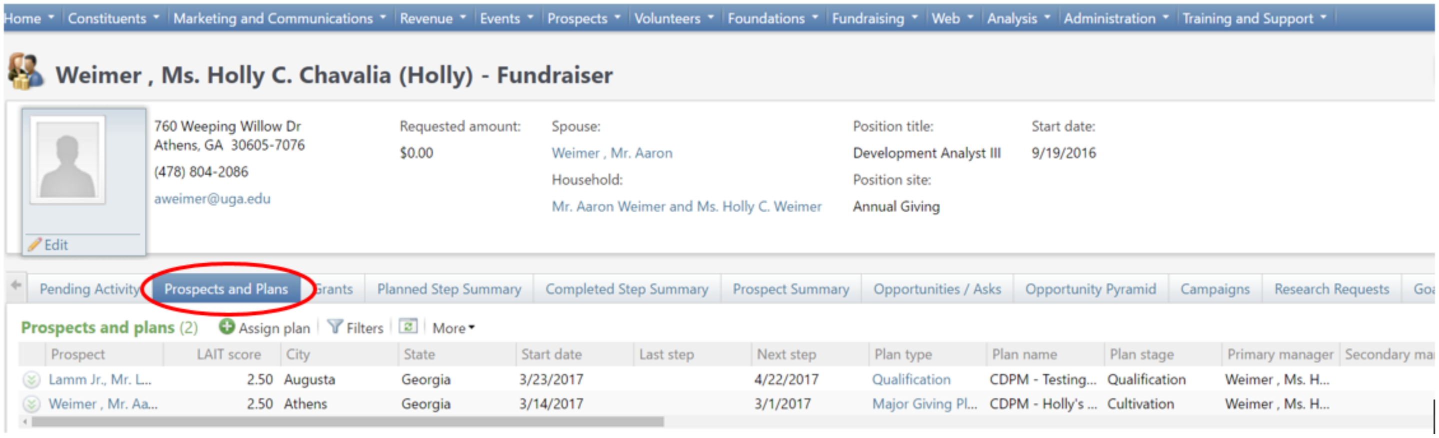
om)

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.


Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
Administration
Training and Support
Edit
Pending Activity
Prospects and Plans
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Research Requests
Go
Assign plan
Filters
More

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

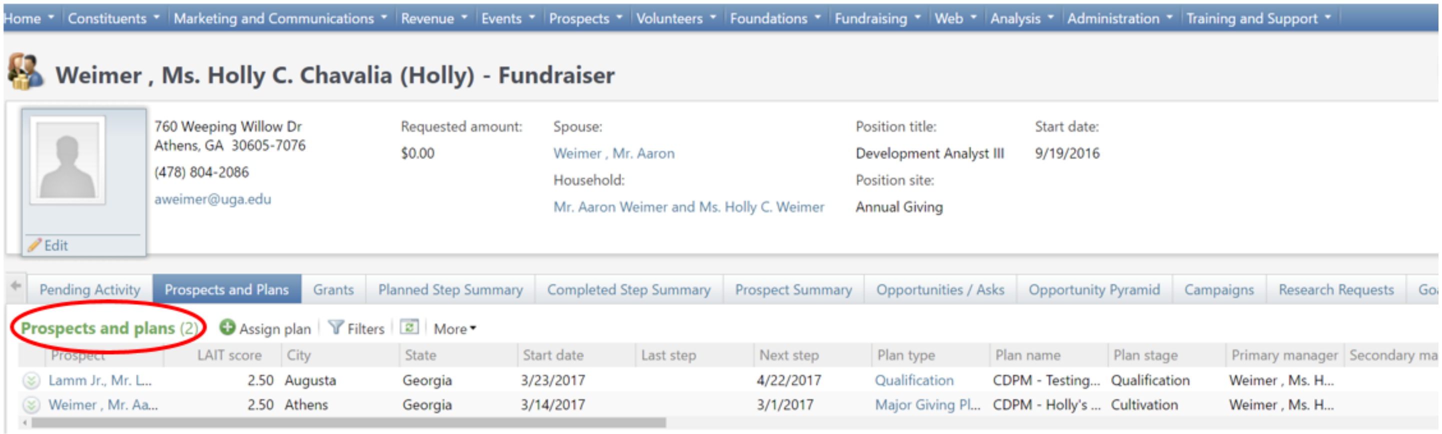
Start date: 9/19/2016

Prospects and plans (2)

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...	

12.3 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
Edit
Pending Activity
Prospects and Plans
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Research Requests
Go
Assign plan
Filters
More

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

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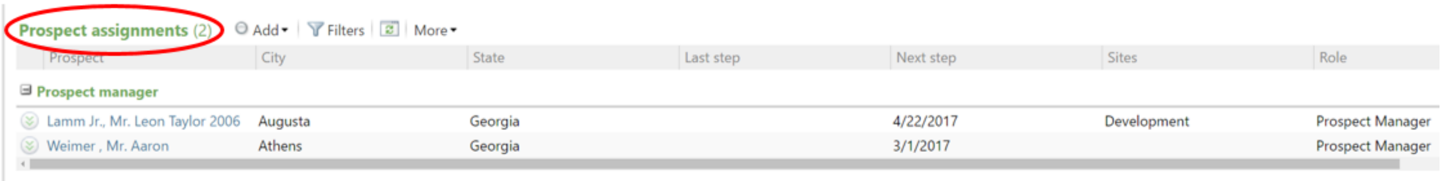
Lamm Jr., Mr. L...	2.50	Augusta	Georgia	3/23/2017		4/22/2017	Qualification	CDPM - Testing...	Qualification	Weimer , Ms. H...	
Weimer , Mr. Aa...	2.50	Athens	Georgia	3/14/2017		3/1/2017	Major Giving Pl...	CDPM - Holly's ...	Cultivation	Weimer , Ms. H...	

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.

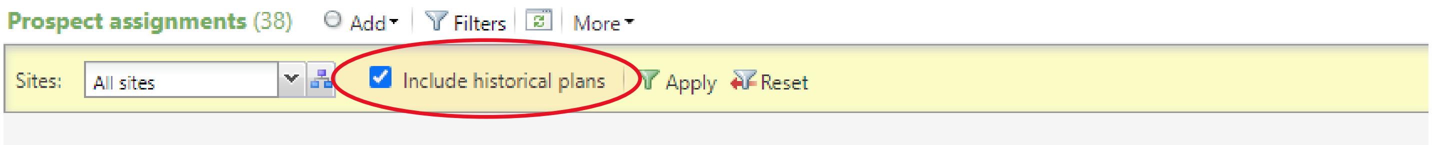

Add
Filters
More

Prospect assignments (2)

Prospect	City	State	Last step	Next step	Sites	Role
Prospect manager						
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.


Add
Filters
More
Apply
Reset

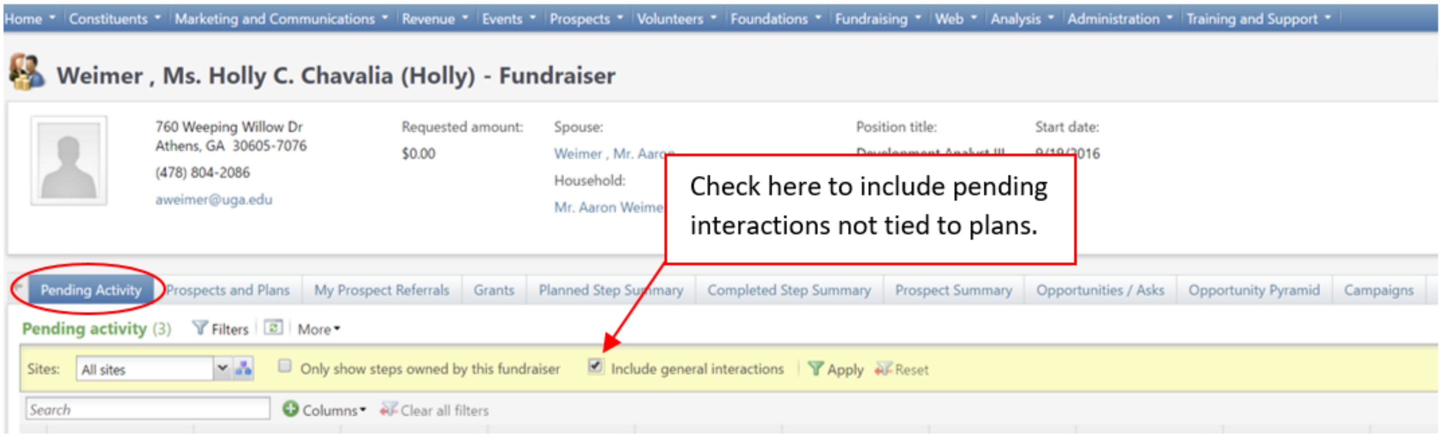
Prospect assignments (38)

Sites: All sites

☑ Include historical plans

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.


Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
Administration
Training and Support
Pending Activity
Prospects and Plans
My Prospect Referrals
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Filters
More
Apply
Reset
Search
Columns
Clear all filters

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 Weime
Position title:
Start date: 9/19/2016

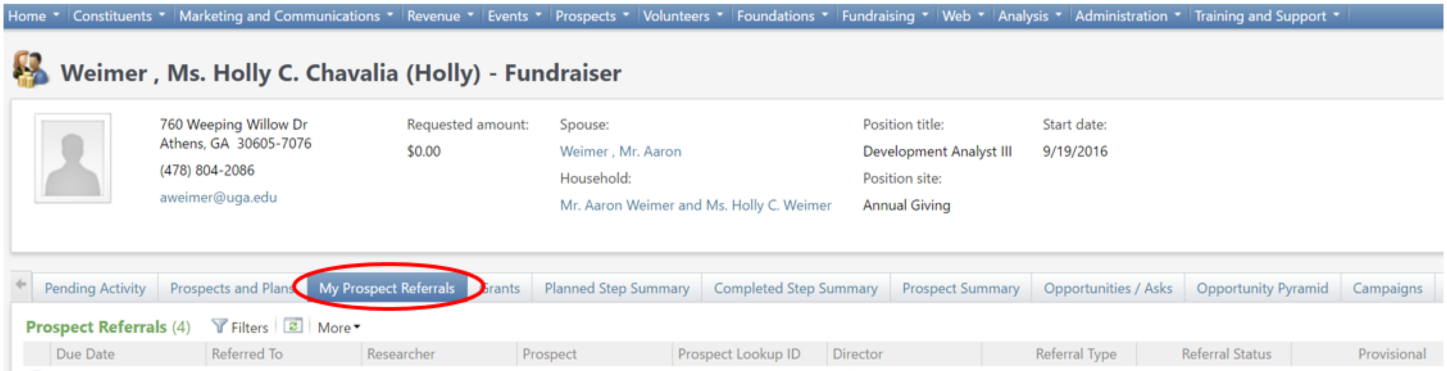
Pending activity (3)

Sites: All sites
☐ Only show steps owned by this fundraiser
☑ Include general interactions

Check here to include pending interactions not tied to plans.

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 12.30~~12.31~~.


Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
Administration
Training and Support
Pending Activity
Prospects and Plans
My Prospect Referrals
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Filters
More

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

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

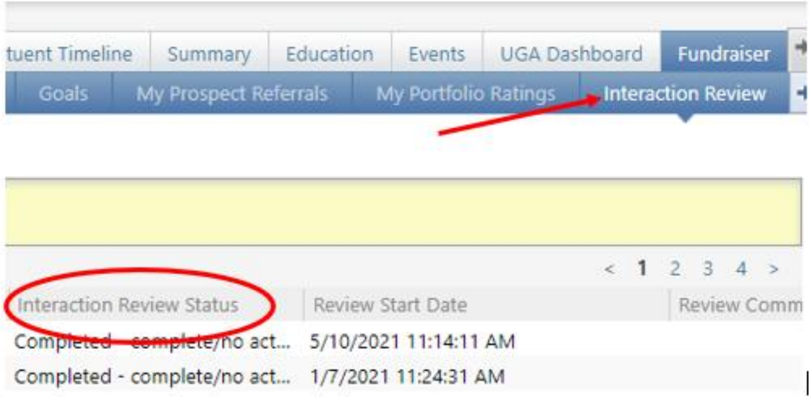
Requested amount: $0.00
Spouse: Weimer , Mr. Aaron
Household: Mr. Aaron Weimer and Ms. Holly C. Weimer
Position title: Development Analyst III
Position site: Annual Giving
Start date: 9/19/2016

Prospect Referrals (4)

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

12.8 INTERACTION REVIEW: REVIEWING COMPLETED, PENDING AND ACTION NEEDED INTERACTIONS

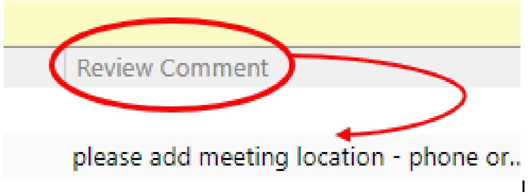
To review your meeting interactions that have been marked as complete, pending, and/or action needed by a member of the Prospect Management Team, navigate to your My Fundraiser Tab and select the Interaction Review subtab.


tuent Timeline
Summary
Education
Events
UGA Dashboard
Fundraiser
Goals
My Prospect Referrals
My Portfolio Ratings
Interaction Review
< 1 2 3 4 >

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	

12.8.1 Review Comment

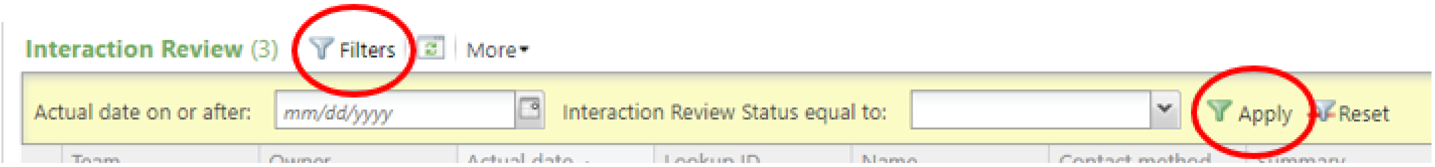
If your meeting interaction has 'Action Needed' as an Interaction Review Status, Prospect Management would have included a comment as to what needs to be updated in the 'Review Comment' section.



Review Comment
please add meeting location - phone or..

12.8.2 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.


Interaction Review (3)
Filters
More
Apply
Reset
Team
Owner
Actual date
Lookup ID
Name
Contact method
Summary

Actual date on or after: mm/dd/yyyy

Interaction Review Status equal to:

12.9 THE "PROSPECTS OF" GROUP

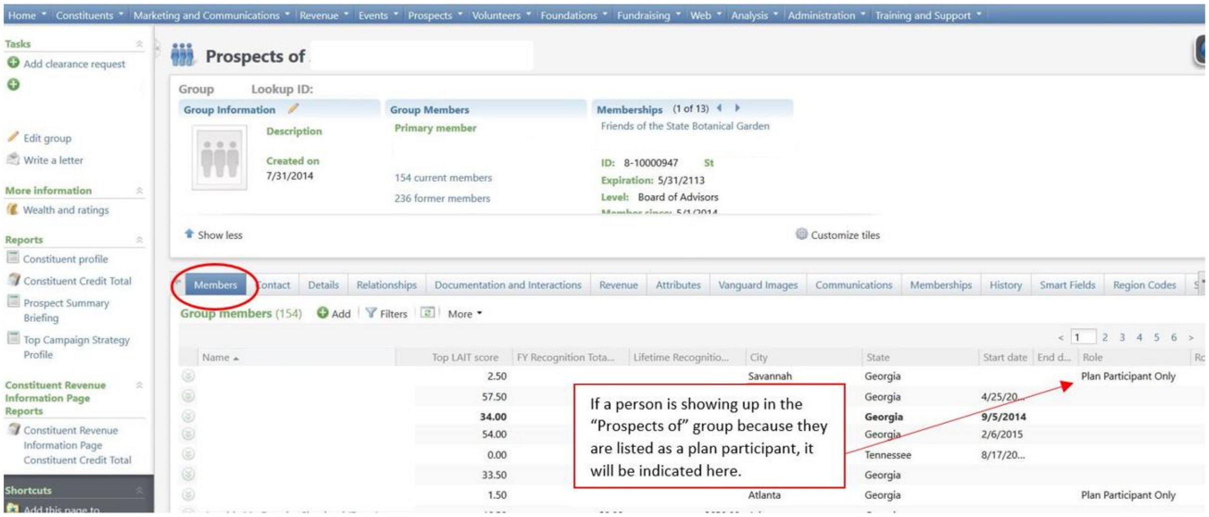
The "Prospects of" group is an automatically generated group in GAIL that includes all prospects that a fundraiser is connected to as Prospect Manager, Primary Manager, Secondary Manager, or Secondary Solicitor. It also includes any constituent listed as a plan participant on any of a fundraiser's plans. 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.

12.9.1 Members Tab

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

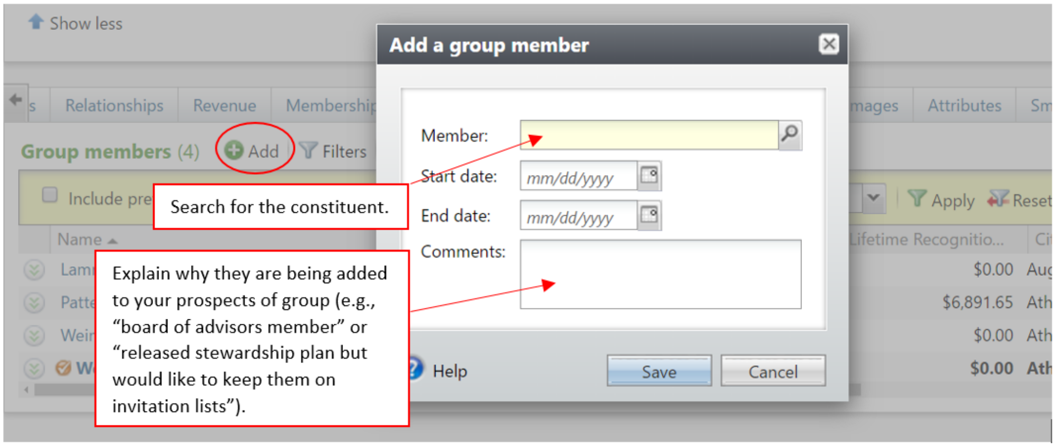
Note: Your tabs may be in a different order.


Prospects of
Group Information
Group Members
Memberships
Members
Group members (154)
Add
Filters
More

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

12.9.2 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.

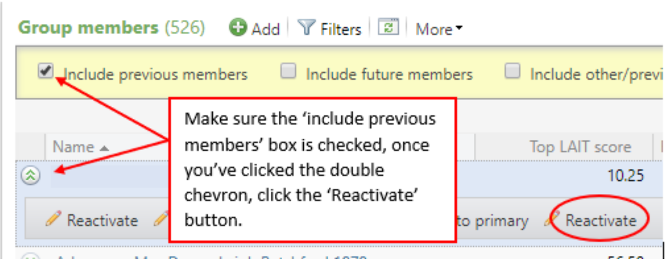

Add a group member
Member:
Start date:
End date:
Comments:
Save
Cancel
Help
Group members (4)
Add
Filters

Search for the constituent.

Explain why they are being added to your prospects of group (e.g., “board of advisors member” or “released stewardship plan but would like to keep them on invitation lists”).

12.9.3 Reactivating Previous Members

To include prospects that were once 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.

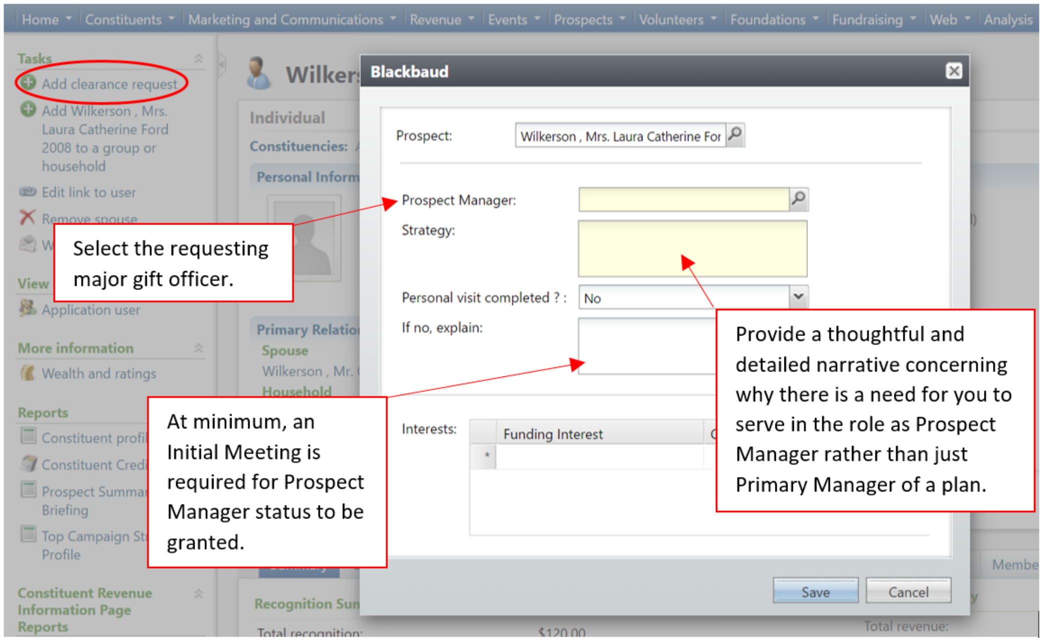

Group members (526)
Add
Filters
More
☑ Include previous members
☐ Include future members
☐ Include other/previ
Name
Top LAIT score
10.25
Reactivate
to primary
Reactivate

Make sure the ‘include previous members’ box is checked, once you’ve clicked the double chevron, click the ‘Reactivate’ button.

12.10 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.


Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
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 profi
Constituent Credi
Prospect Summar Briefing
Top Campaign St Profile
Constituent Revenue Information Page Reports
Wilker
Individual
Constituencies:
Personal Inform
Primary Relatio
Spouse
Wilkerson , Mr.
Household
Recognition Sun
Total recognition:
$120.00
Total revenue:
Membe
Blackbaud
Prospect Manager:
Strategy:
If no, explain:
Interests:
Funding Interest
Save
Cancel

Prospect: Wilkerson , Mrs. Laura Catherine For

Personal visit completed ? : No

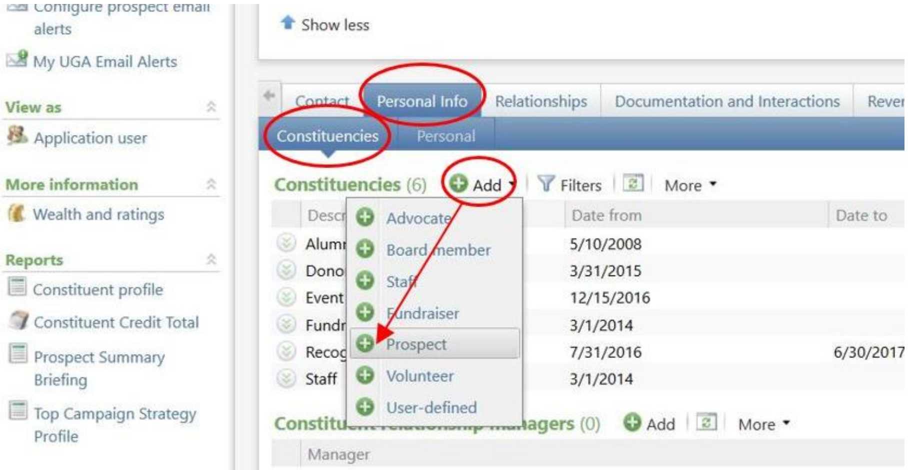
Select the requesting major gift officer.

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.

12.11 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.

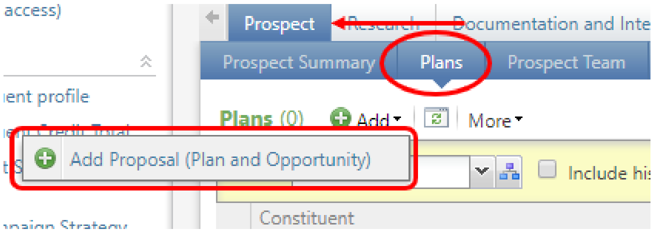

Configure prospect email alerts
My UGA Email Alerts
View as
Application user
More information
Wealth and ratings
Reports
Constituent profile
Constituent Credit Total
Prospect Summary Briefing
Top Campaign Strategy Profile
Show less
Contact
Personal Info
Relationships
Documentation and Interactions
Rever
Constituencies
Personal
Constituencies (6)
Add
Filters
More
Advocate
Board member
Staff
Fundraiser
Prospect
Volunteer
User-defined
Constituent relationship managers (0)
Add
More
Manager

Descr	Date from	Date to
Alum	5/10/2008	
Dono	3/31/2015	
Event	12/15/2016	
Fundr	3/1/2014	
Recog	7/31/2016	6/30/2017
Staff	3/1/2014	

12.12 HOW TO ADD A PLAN

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

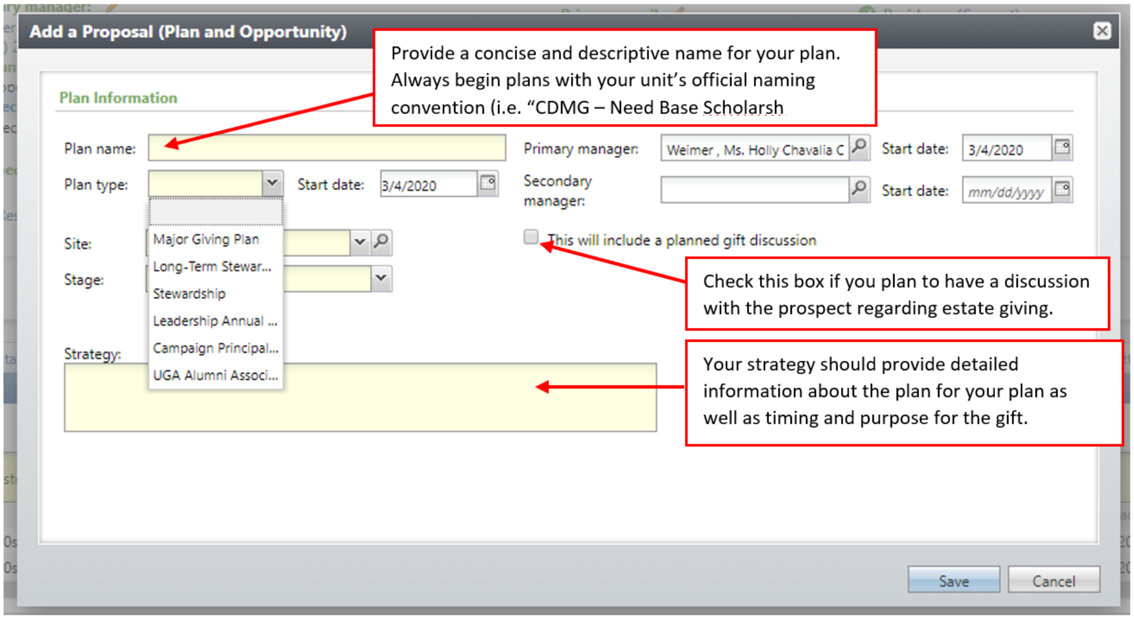
Note: You will select “Add proposal (plan and opportunity)” when adding a new plan. The plan type (Major Giving, Leadership Annual, Stewardship, etc.) will be selected on the next screen.


Prospect
Research
Documentation and Inte
Prospect Summary
Plans
Prospect Team
Plans (0)
Add
More
Add Proposal (Plan and Opportunity)
Include his
Constituent

12.13 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.


Add a Proposal (Plan and Opportunity)
Plan Information
Plan name:
Plan type:
Site:
Stage:
Strategy:
Major Giving Plan
Long-Term Stewar...
Stewardship
Leadership Annual ...
Campaign Principal...
UGA Alumni Associ...
Save
Cancel

Start date: 3/4/2020

Primary manager: Weimer , Ms. Holly Chavalia C

Start date: 3/4/2020

Secondary manager:

Start date: mm/dd/yyyy

☐ This will include a planned gift discussion

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

Check this box if you plan to have a discussion with the prospect regarding estate giving.

Your strategy should provide detailed information about the plan for your plan as well as timing and purpose for the gift.

12.13.1 Example of a Proper Strategy

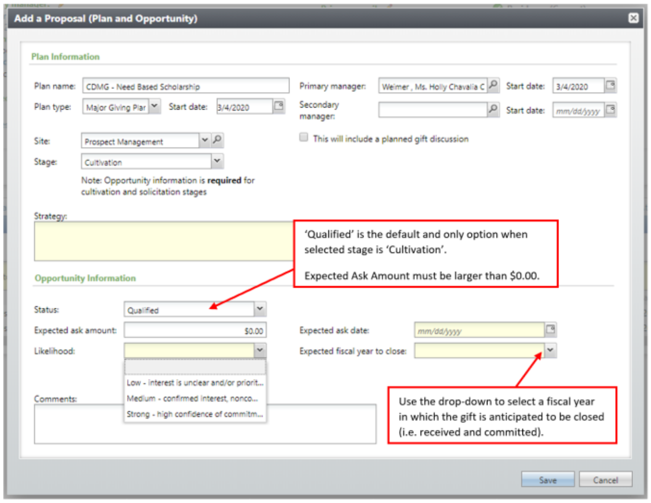
A plan strategy should provide an overview of key cultivation and solicitation components and include a biographical sketch, information about capacity and inclination, and a strategy statement (5.1).

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* *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."*

12.14 **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 a few more options with status: Ask Amount and Ask Date. The yellow highlighted fields are required.


Add a Proposal (Plan and Opportunity)

Plan Information

Plan name: CDMG - Need Based Scholarship
Plan type: Major Giving Plar
Start date: 3/4/2020
Primary manager: Weimer , Ms. Holly Chavalia C
Start date: 3/4/2020
Secondary manager:
Start date: mm/dd/yyyy
☐ This will include a planned gift discussion
Site: Prospect Management
Stage: Cultivation
Note: Opportunity information is **required** for cultivation and solicitation stages
Strategy:

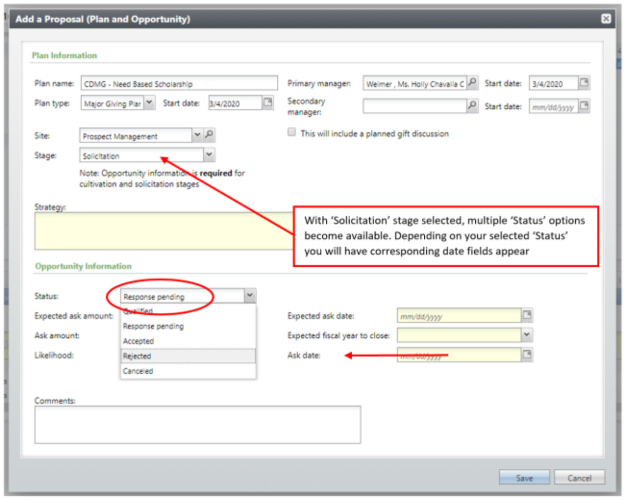
Opportunity Information

Status: Qualified
Expected ask amount: $0.00
Likelihood:
Low - interest is unclear and/or priorit...
Medium - confirmed interest, nonco...
Strong - high confidence of commitm...
Expected ask date: mm/dd/yyyy
Expected fiscal year to close:
Comments:

'Qualified' is the default and only option when selected stage is 'Cultivation'.

Expected Ask Amount must be larger than $0.00.

Use the drop-down to select a fiscal year in which the gift is anticipated to be closed (i.e. received and committed).


Add a Proposal (Plan and Opportunity)

Plan Information

Plan name: CDMG - Need Based Scholarship
Plan type: Major Giving Plar
Start date: 3/4/2020
Primary manager: Weimer , Ms. Holly Chavalia C
Start date: 3/4/2020
Secondary manager:
Start date: mm/dd/yyyy
☐ This will include a planned gift discussion
Site: Prospect Management
Stage: Solicitation
Note: Opportunity information is **required** for cultivation and solicitation stages
Strategy:

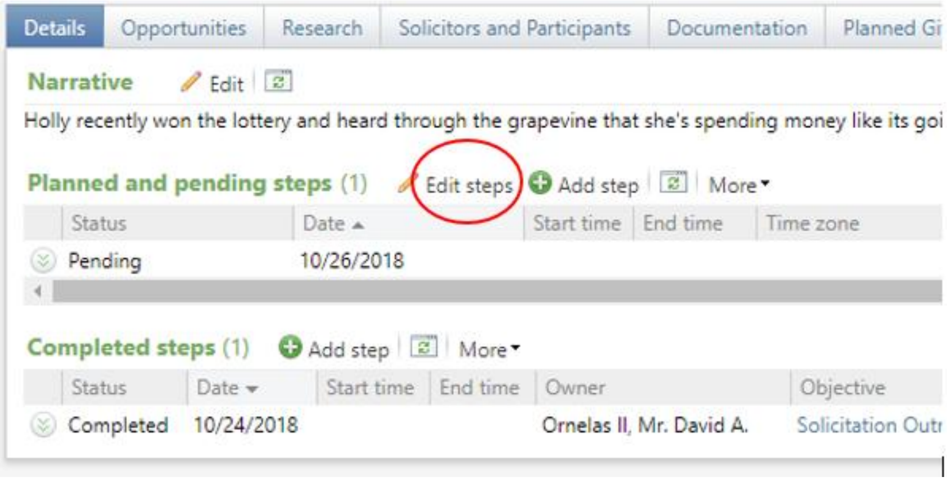
Opportunity Information

Status: Response pending
Qualified
Response pending
Accepted
Rejected
Canceled
Expected ask amount:
Ask amount:
Likelihood:
Expected ask date: mm/dd/yyyy
Expected fiscal year to close:
Ask date: mm/dd/yyyy
Comments:

With 'Solicitation' stage selected, multiple 'Status' options become available. Depending on your selected 'Status' you will have corresponding date fields appear

12.15 **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.



Narrative

Holly recently won the lottery and heard through the grapevine that she's spending money like its goi

Planned and pending steps (1)

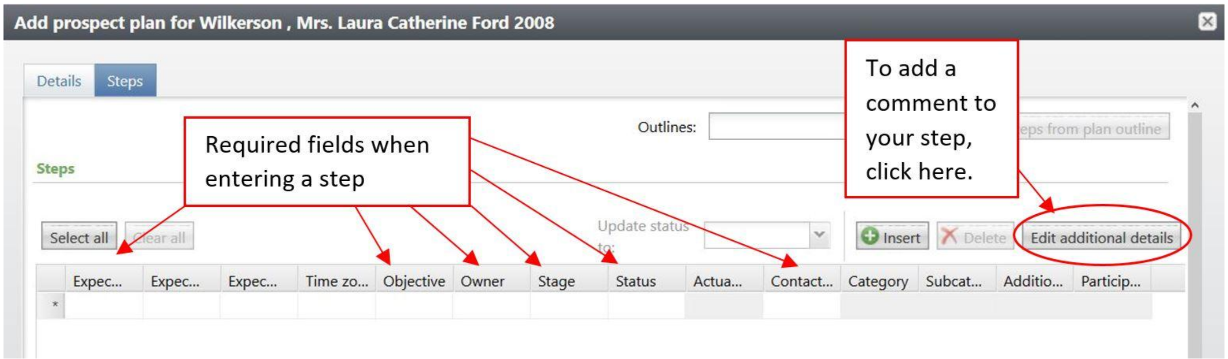
Status	Date	Start time	End time	Time zone
Pending	10/26/2018			

Completed steps (1)

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

12.16 **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.

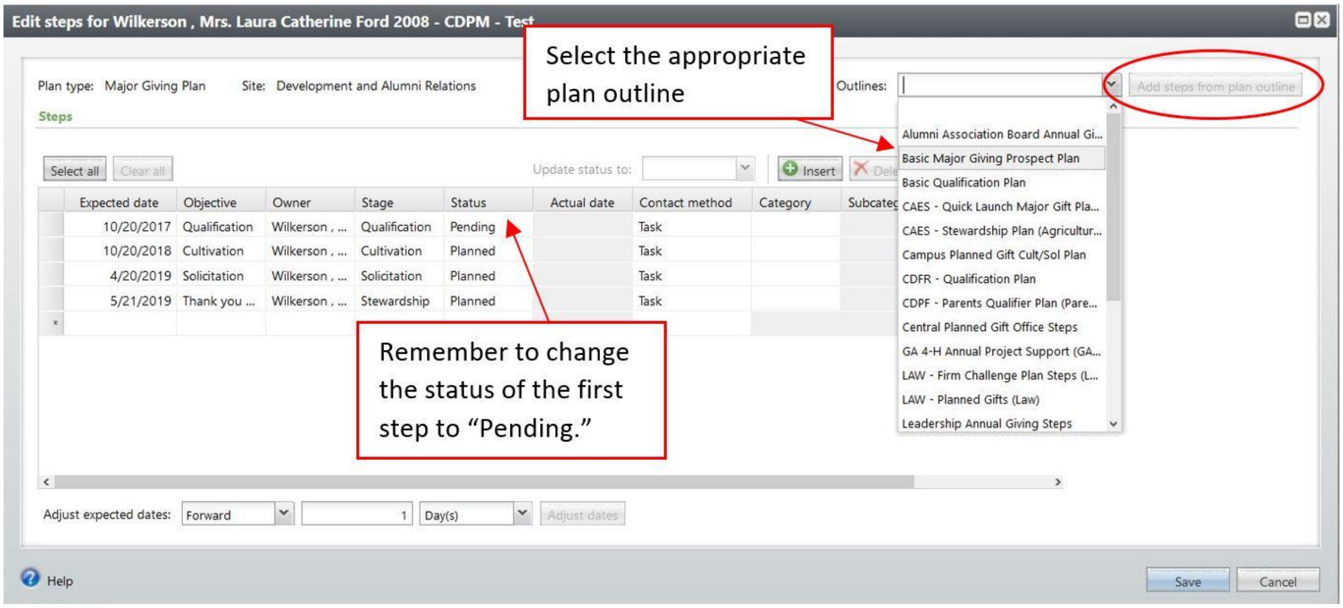

Add prospect plan for Wilkerson , Mrs. Laura Catherine Ford 2008
Details
Steps
Outlines:
eps from plan outline
Steps
Select all
Clear all
Update status to:
Insert
Delete
Edit additional details
Expec...
Expec...
Expec...
Time zo...
Objective
Owner
Stage
Status
Actua...
Contact...
Category
Subcat...
Additio...
Particip...
*

Required fields when entering a step

To add a comment to your step, click here.

12.17 **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.”


Edit steps for Wilkerson , Mrs. Laura Catherine Ford 2008 - CDPM - Test
Outlines:
Add steps from plan outline
Alumni Association Board Annual Gi...
Basic Major Giving Prospect Plan
Basic Qualification Plan
CAES - Quick Launch Major Gift Pla...
CAES - Stewardship Plan (Agricultur...
Campus Planned Gift Cult/Sol Plan
CDFR - Qualification Plan
CDPF - Parents Qualifier Plan (Pare...
Central Planned Gift Office Steps
GA 4-H Annual Project Support (GA...
LAW - Firm Challenge Plan Steps (L...
LAW - Planned Gifts (Law)
Leadership Annual Giving Steps
Steps
Select all
Clear all
Update status to:
Insert
Dele
Adjust dates
Help
Save
Cancel

Plan type: Major Giving Plan
Site: Development and Alumni Relations

Expected date	Objective	Owner	Stage	Status	Actual date	Contact method	Category	Subcateg
10/20/2017	Qualification	Wilkerson , ...	Qualification	Pending		Task		
10/20/2018	Cultivation	Wilkerson , ...	Cultivation	Planned		Task		
4/20/2019	Solicitation	Wilkerson , ...	Solicitation	Planned		Task		
5/21/2019	Thank you ...	Wilkerson , ...	Stewardship	Planned		Task		

Adjust expected dates: Forward 1 Day(s)

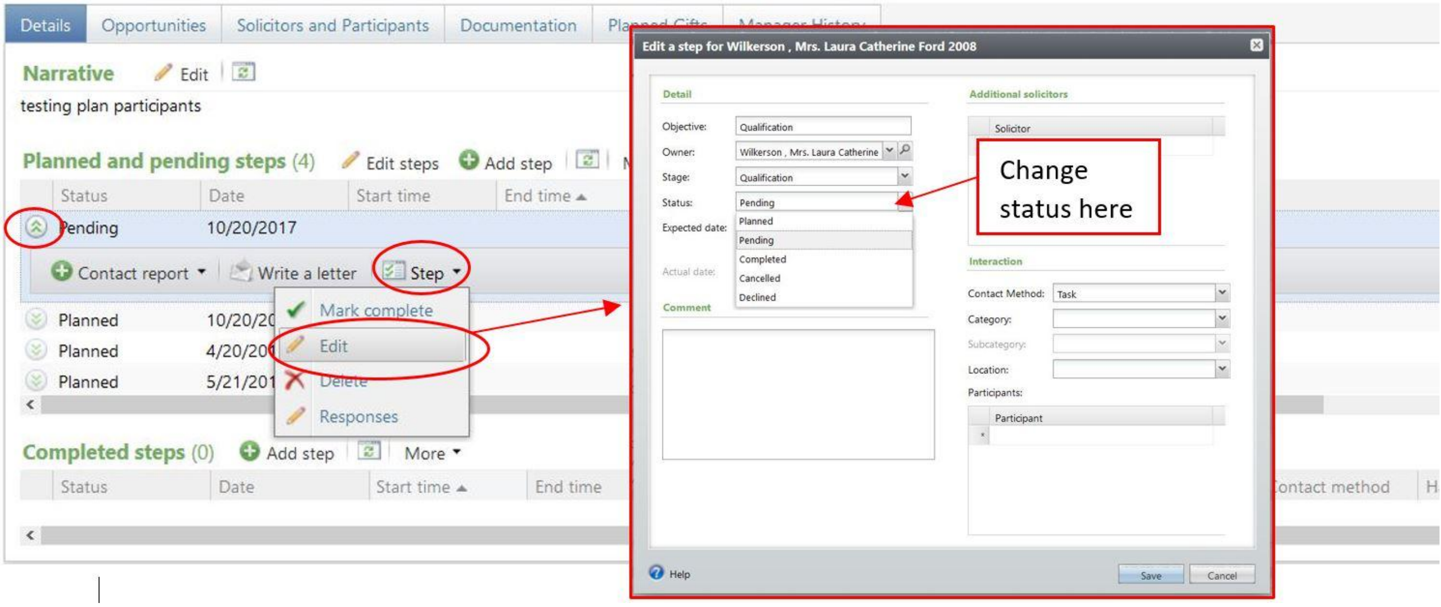
Select the appropriate plan outline

Remember to change the status of the first step to “Pending.”

12.18 HOW TO CHANGE THE STEP STATUS

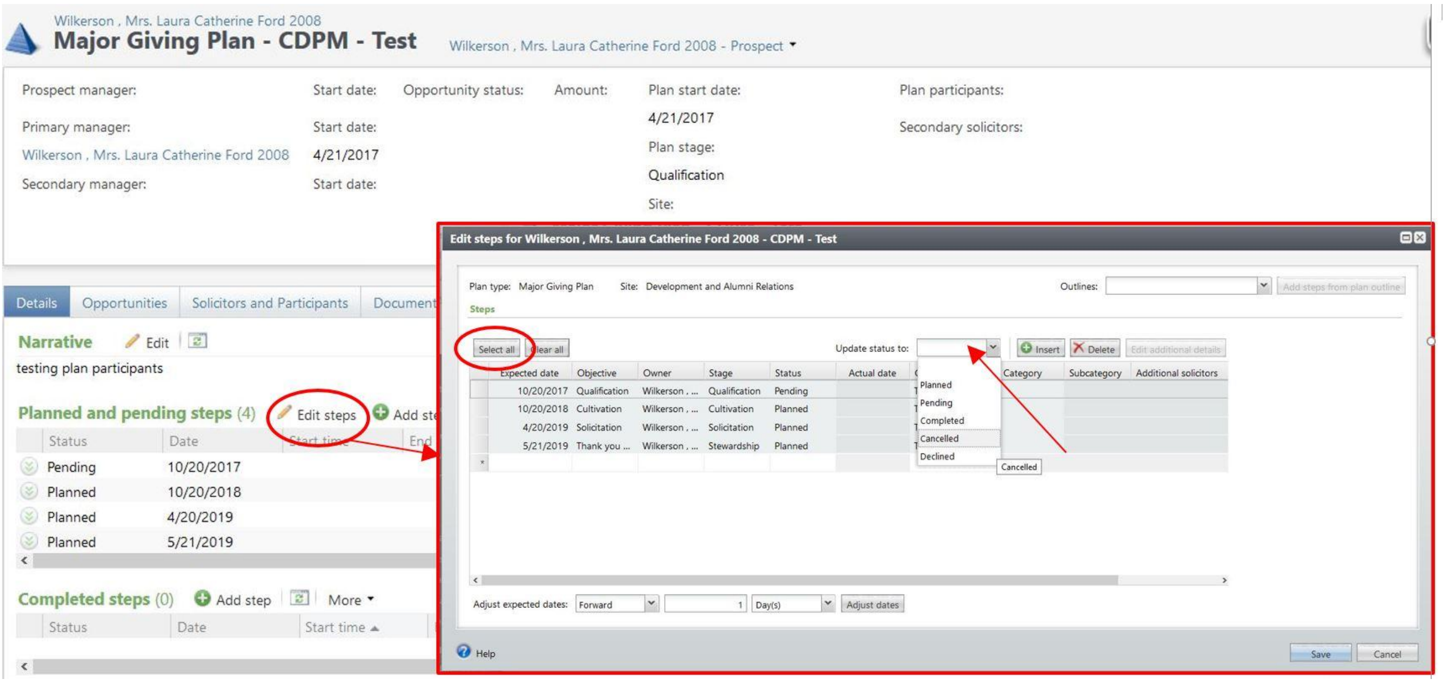
12.18.1 How to Change an Individual Step Status

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."


Details
Opportunities
Solicitors and Participants
Documentation
Narrative
Edit
testing plan participants
Planned and pending steps (4)
Edit steps
Add step
Status
Date
Start time
End time
Pending 10/20/2017
Contact report
Write a letter
Step
Mark complete
Edit
Delete
Responses
Planned 10/20/20
Planned 4/20/20
Planned 5/21/201
Completed steps (0)
Add step
More
Edit a step for Wilkerson , Mrs. Laura Catherine Ford 2008
Detail
Objective: Qualification
Owner: Wilkerson , Mrs. Laura Catherine
Stage: Qualification
Status: Pending
Planned
Pending
Completed
Cancelled
Declined
Expected date:
Actual date:
Comment
Additional solicitors
Solicitor
Change status here
Interaction
Contact Method: Task
Category:
Subcategory:
Location:
Participants:
Participant
Help
Save
Cancel

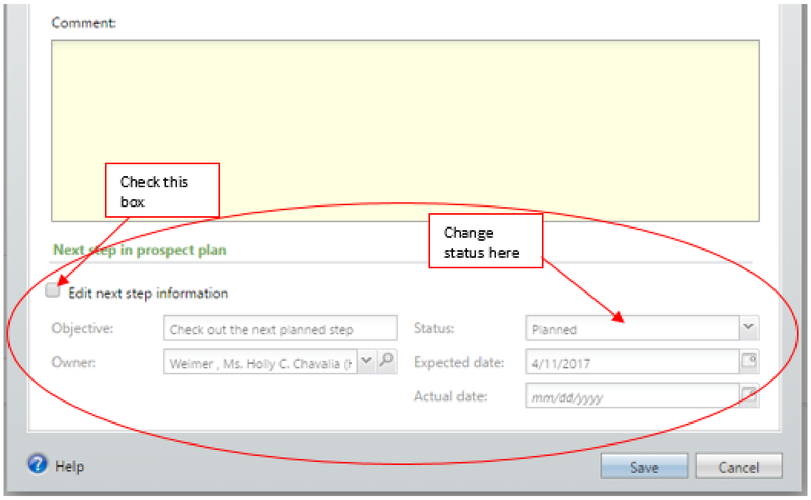
12.18.2 How to Change the Status of Multiple Steps at Once

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.


Wilkerson , Mrs. Laura Catherine Ford 2008
Major Giving Plan - CDPM - Test
Wilkerson , Mrs. Laura Catherine Ford 2008 - Prospect
Prospect manager:
Primary manager:
Wilkerson , Mrs. Laura Catherine Ford 2008
Secondary manager:
Start date: 4/21/2017
Opportunity status:
Amount:
Plan start date: 4/21/2017
Plan stage: Qualification
Site:
Plan participants:
Secondary solicitors:
Details
Opportunities
Solicitors and Participants
Narrative
Edit
testing plan participants
Planned and pending steps (4)
Edit steps
Pending 10/20/2017
Planned 10/20/2018
Planned 4/20/2019
Planned 5/21/2019
Completed steps (0)
Add step
More
Edit steps for Wilkerson , Mrs. Laura Catherine Ford 2008 - CDPM - Test
Plan type: Major Giving Plan
Site: Development and Alumni Relations
Outlines:
Add steps from plan outline
Steps
Select all
Clear all
Update status to:
Insert
Delete
Edit additional details
Expected date | Objective | Owner | Stage | Status | Actual date | Category | Subcategory | Additional solicitors
10/20/2017 | Qualification | Wilkerson , ... | Qualification | Pending
10/20/2018 | Cultivation | Wilkerson , ... | Cultivation | Planned
4/20/2019 | Solicitation | Wilkerson , ... | Solicitation | Planned
5/21/2019 | Thank you ... | Wilkerson , ... | Stewardship | Planned
Planned
Pending
Completed
Cancelled
Declined
Adjust expected dates: Forward 1 Day(s)
Adjust dates
Help
Save
Cancel

12.18.3 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”.



Comment:

Check this box

Change status here

Next step in prospect plan

☐ Edit next step information

Objective: Check out the next planned step

Owner: Weimer , Ms. Holly C. Chavalia (

Status: Planned

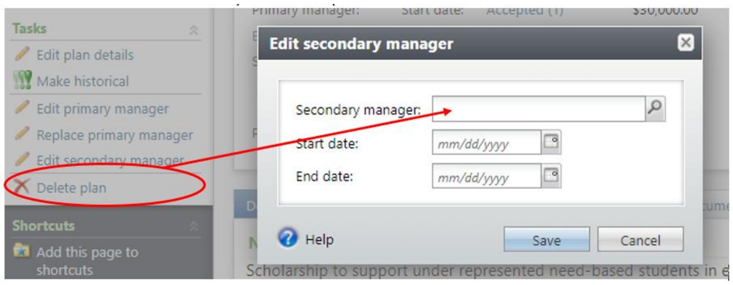
Expected date: 4/11/2017

Actual date: mm/dd/yyyy

Help
Save
Cancel

12.19 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.



Edit secondary manager

Secondary manager:

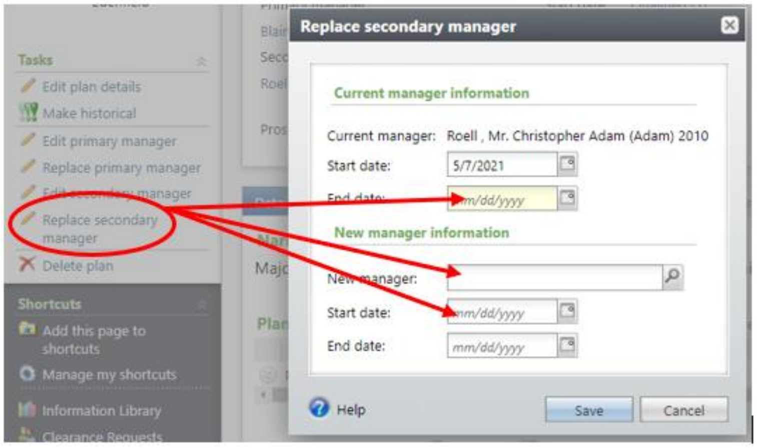
Start date: mm/dd/yyyy

End date: mm/dd/yyyy

Tasks
Edit plan details
Make historical
Edit primary manager
Replace primary manager
Edit secondary manager
Delete plan
Shortcuts
Add this page to shortcuts
Help
Save
Cancel
Scholarship to support under represented need-based students in e

12.20 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 of the current secondary manager. Search for the Fundraiser you wish to replace and enter the start date.



Replace secondary manager

Current manager information

Current manager: Roell , Mr. Christopher Adam (Adam) 2010

Start date: 5/7/2021

End date: mm/dd/yyyy

New manager information

New manager:

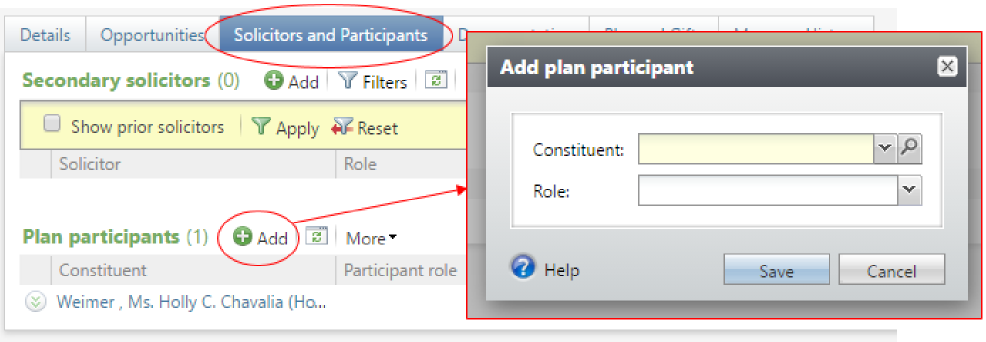
Start date: mm/dd/yyyy

End date: mm/dd/yyyy

Tasks
Edit plan details
Make historical
Edit primary manager
Replace primary manager
Edit secondary manager
Replace secondary manager
Delete plan
Shortcuts
Add this page to shortcuts
Manage my shortcuts
Information Library
Clearance Requests
Help
Save
Cancel

12.21 HOW TO ADD A PLAN PARTICIPANT (WITHIN THE PLAN)

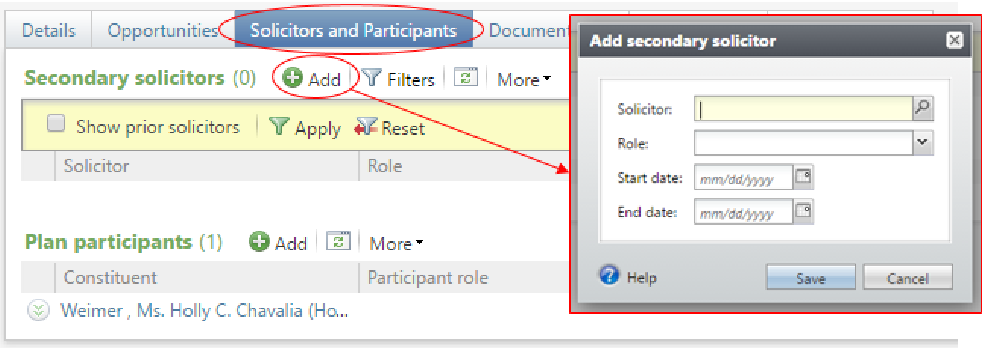
On your plan, navigate to the “Solicitors and Participants” tab; click the Add button under the “Plan participants” section.


Details
Opportunities
Solicitors and Participants
Secondary solicitors (0)
Add
Filters
Show prior solicitors
Apply
Reset
Solicitor
Role
Plan participants (1)
Add
More
Constituent
Participant role
Add plan participant
Constituent:
Role:
Help
Save
Cancel

Weimer , Ms. Holly C. Chavalia (Ho...

12.22 HOW TO ADD A SECONDARY SOLICITOR (WITHIN THE PLAN)

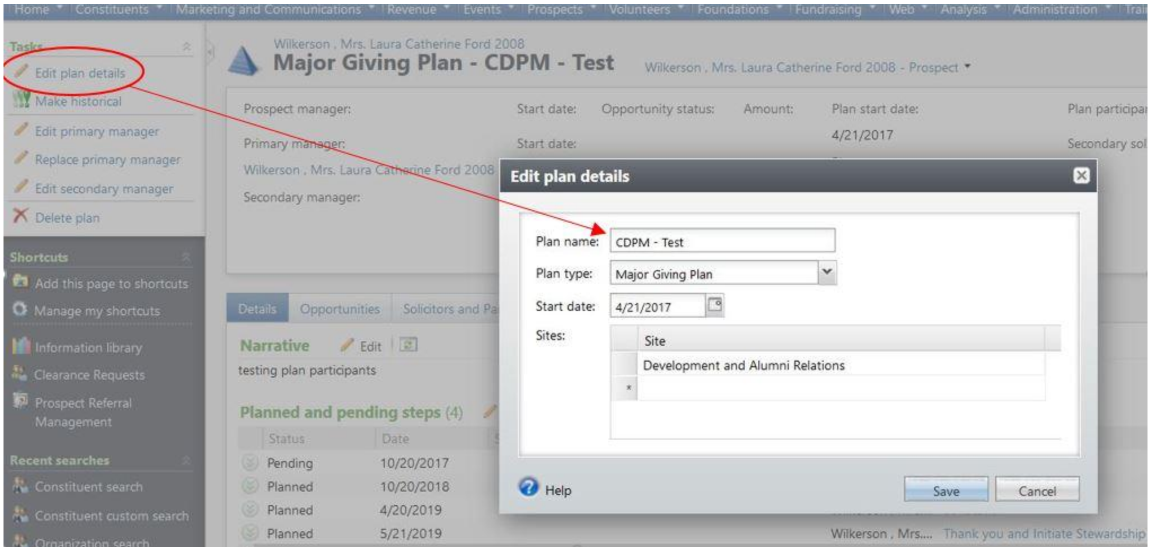
On your plan, navigate to the “Solicitors and Participants” tab; click the Add button under the “Secondary solicitors” section.


Details
Opportunities
Solicitors and Participants
Documen
Secondary solicitors (0)
Add
Filters
More
Show prior solicitors
Apply
Reset
Solicitor
Role
Plan participants (1)
Add
More
Constituent
Participant role
Add secondary solicitor
Solicitor:
Role:
Start date:
mm/dd/yyyy
End date:
mm/dd/yyyy
Help
Save
Cancel

Weimer , Ms. Holly C. Chavalia (Ho...

12.23 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.


Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
Administration
Tasks
Edit plan details
Make historical
Edit primary manager
Replace primary manager
Edit secondary manager
Delete plan
Shortcuts
Add this page to shortcuts
Manage my shortcuts
Information library
Clearance Requests
Prospect Referral Management
Recent searches
Constituent search
Constituent custom search
Organization search
Wilkerson , Mrs. Laura Catherine Ford 2008
Major Giving Plan - CDPM - Test
Wilkerson , Mrs. Laura Catherine Ford 2008 - Prospect
Prospect manager:
Primary manager:
Wilkerson , Mrs. Laura Catherine Ford 2008
Secondary manager:
Start date:
Opportunity status:
Amount:
Plan start date:
4/21/2017
Plan participa
Secondary sol
Details
Opportunities
Solicitors and Pa
Narrative
Edit
testing plan participants
Planned and pending steps (4)
Status
Date
Pending 10/20/2017
Planned 10/20/2018
Planned 4/20/2019
Planned 5/21/2019
Wilkerson , Mrs....
Thank you and Initiate Stewardship
Edit plan details
Help
Save
Cancel

Plan name: CDPM - Test

Plan type: Major Giving Plan

Start date: 4/21/2017

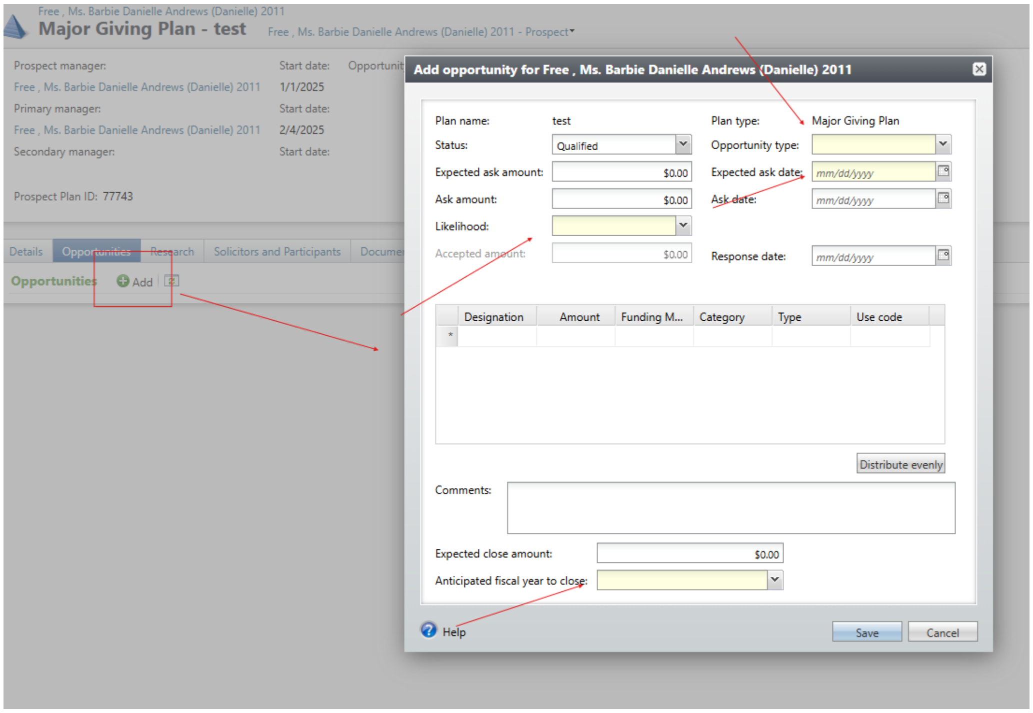
Sites:

Site
Development and Alumni Relations

12.24 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.

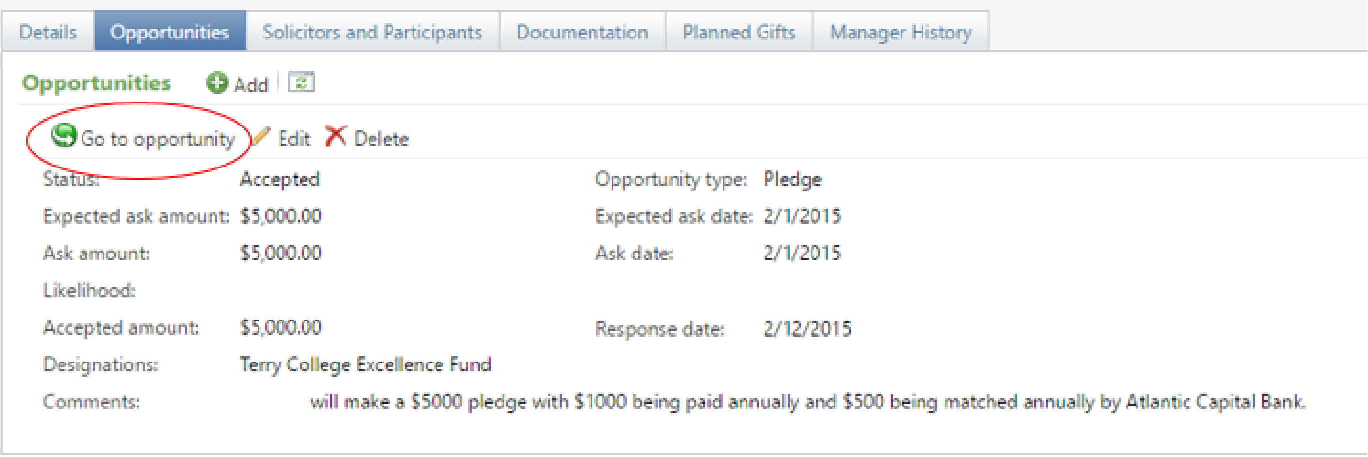

Free , Ms. Barbie Danielle Andrews (Danielle) 2011
Major Giving Plan - test
Free , Ms. Barbie Danielle Andrews (Danielle) 2011 - Prospect
Details
Opportunities
Research
Solicitors and Participants
Docume
Opportunities
Add
Add opportunity for Free , Ms. Barbie Danielle Andrews (Danielle) 2011
Designation
Amount
Funding M...
Category
Type
Use code
Distribute evenly
Help
Save
Cancel

Prospect manager: Free , Ms. Barbie Danielle Andrews (Danielle) 2011
Start date: 1/1/2025
Primary manager: Free , Ms. Barbie Danielle Andrews (Danielle) 2011
Start date: 2/4/2025
Secondary manager:
Start date:
Prospect Plan ID: 77743

Plan name: test
Plan type: Major Giving Plan
Status: Qualified
Opportunity type:
Expected ask amount: $0.00
Expected ask date: mm/dd/yyyy
Ask amount: $0.00
Ask date: mm/dd/yyyy
Likelihood:
Accepted amount: $0.00
Response date: mm/dd/yyyy
Comments:
Expected close amount: $0.00
Anticipated fiscal year to close:

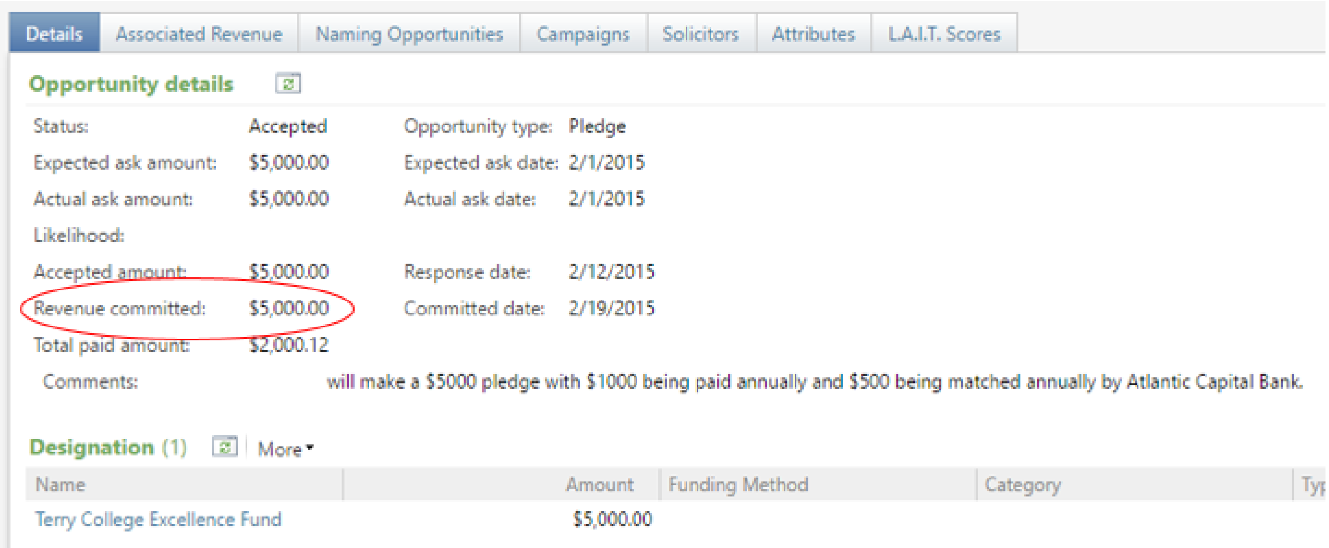
12.25 How to See if Revenue Has Been Associated to an Opportunity

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.


Details
Opportunities
Solicitors and Participants
Documentation
Planned Gifts
Manager History
Opportunities
Add
Go to opportunity
Edit
Delete

Status: Accepted
Opportunity type: Pledge
Expected ask amount: $5,000.00
Expected ask date: 2/1/2015
Ask amount: $5,000.00
Ask date: 2/1/2015
Likelihood:
Accepted amount: $5,000.00
Response date: 2/12/2015
Designations: Terry College Excellence Fund
Comments: will make a $5000 pledge with $1000 being paid annually and $500 being matched annually by Atlantic Capital Bank.

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
More

Opportunity details

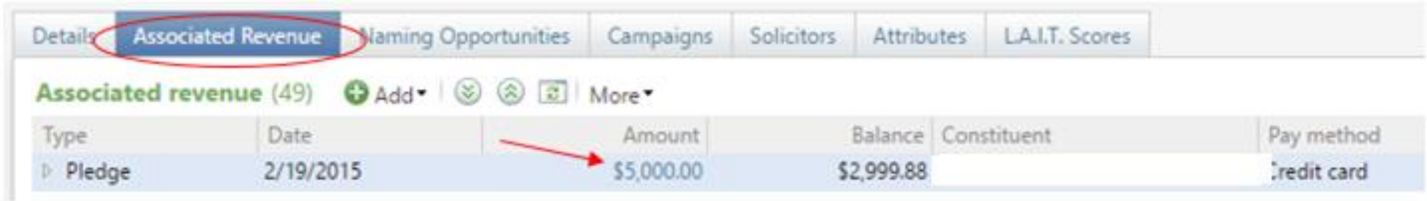
Status:	Accepted	Opportunity type:	Pledge
Expected ask amount:	$5,000.00	Expected ask date:	2/1/2015
Actual ask amount:	$5,000.00	Actual ask date:	2/1/2015
Likelihood:			
Accepted amount:	$5,000.00	Response date:	2/12/2015
Revenue committed:	$5,000.00	Committed date:	2/19/2015
Total paid amount:	$2,000.12		

Comments: will make a $5000 pledge with $1000 being paid annually and $500 being matched annually by Atlantic Capital Bank.

Designation (1)

Name	Amount	Funding Method	Category	Typ
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 details.

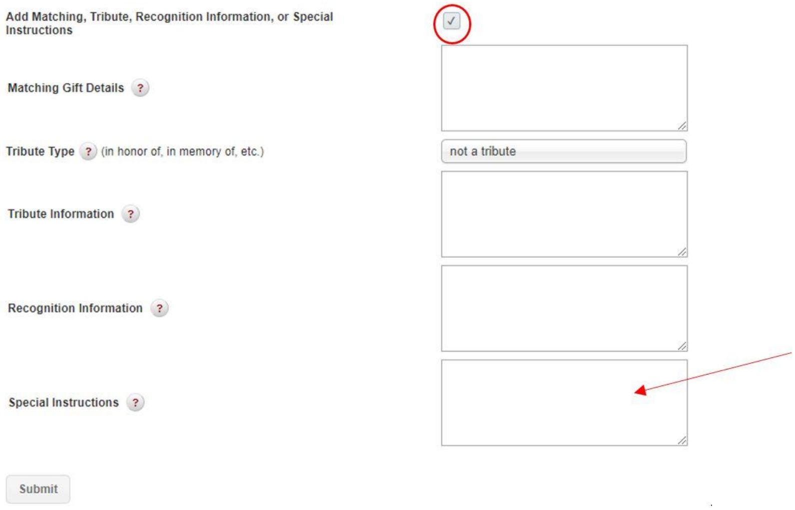

Details
Associated Revenue
Naming Opportunities
Campaigns
Solicitors
Attributes
L.A.I.T. Scores
Add
More

Associated revenue (49)

Type	Date	Amount	Balance	Constituent	Pay method
Pledge	2/19/2015	$5,000.00	$2,999.88		redit card

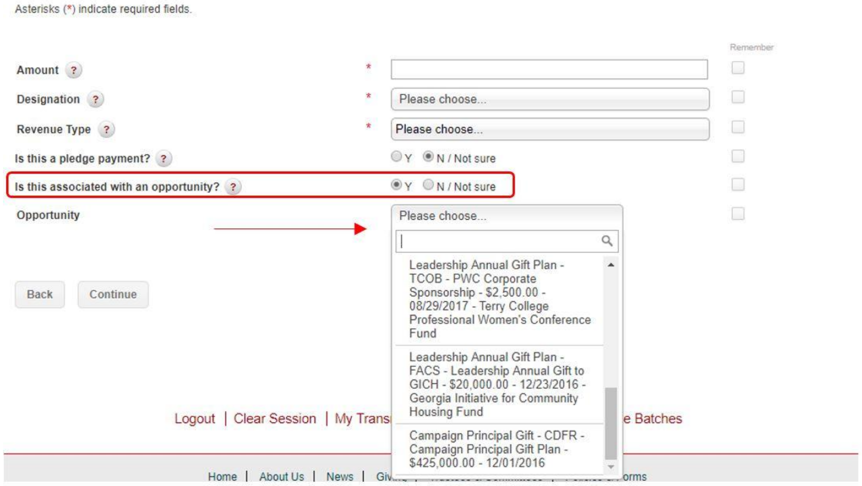
12.26 HOW TO FILL OUT A TRANSMITTAL FORM TO ENSURE THAT REVENUE IS ASSOCIATED WITH THE CORRECT PLAN AND OPPORTUNITY

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 ?	

On the next screen, if the revenue is to be associated with a plan and opportunity, ALWAYS select 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.

			Remember
Amount ?	*		☐
Designation ?	*	Please choose...	☐
Revenue Type ?	*	Please choose...	☐
Is this a pledge payment? ?		○ Y ● N / Not sure	☐
Is this associated with an opportunity? ?		● Y ○ N / Not sure	☐
Opportunity		Please choose...	☐

Leadership Annual Gift Plan - TCOB - PWC 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

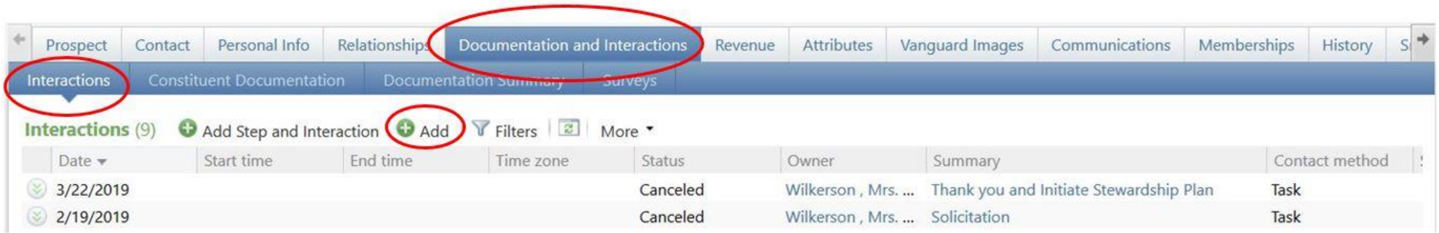
Campaign Principal Gift - CDFR - Campaign Principal Gift Plan - $425,000.00 - 12/01/2016

Back
Continue
Logout | Clear Session | My Trans
e Batches
Home | About Us | News | Giv
orms

12.27 HOW TO ADD INTERACTIONS

12.27.1 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.

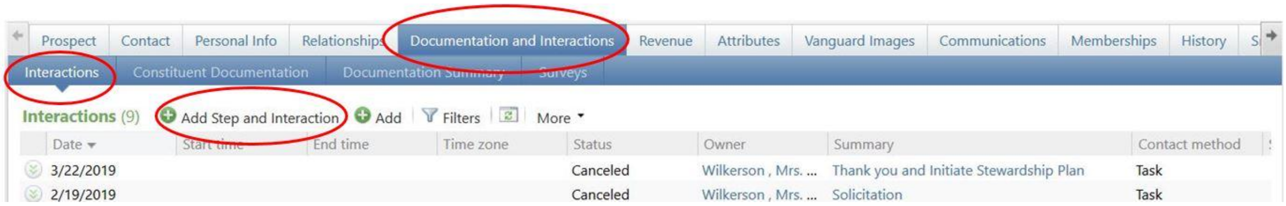


Prospect
Contact
Personal Info
Relationships
Documentation and Interactions
Revenue
Attributes
Vanguard Images
Communications
Memberships
History
Interactions
Constituent Documentation
Documentation Summary
Surveys
Interactions (9)
Add Step and Interaction
Add
Filters
More

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

12.27.2 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.

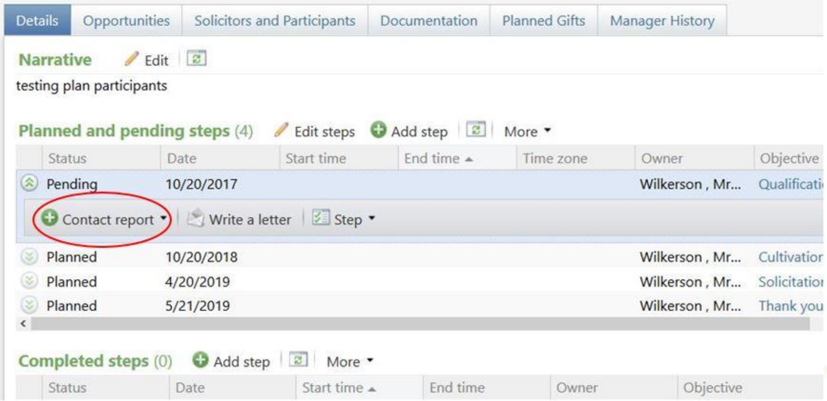


Prospect
Contact
Personal Info
Relationships
Documentation and Interactions
Revenue
Attributes
Vanguard Images
Communications
Memberships
History
Interactions
Constituent Documentation
Documentation Summary
Surveys
Interactions (9)
Add Step and Interaction
Add
Filters
More

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 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.


Details
Opportunities
Solicitors and Participants
Documentation
Planned Gifts
Manager History
Narrative
Edit
Planned and pending steps (4)
Edit steps
Add step
More
Contact report
Write a letter
Step
Completed steps (0)
Add step
More

testing plan participants

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

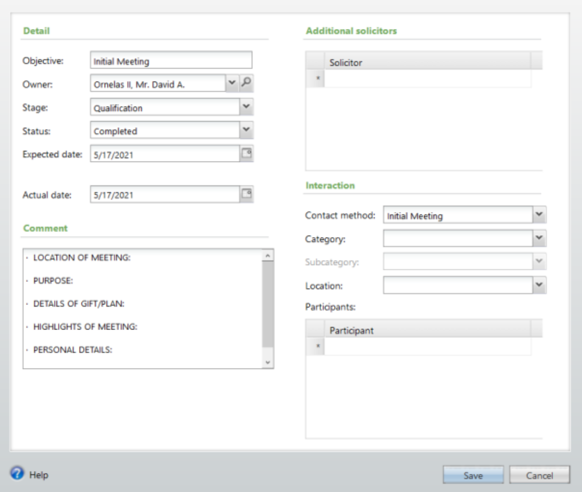
Status	Date	Start time	End time	Owner	Objective

12.29 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 a 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 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.


Detail
Additional solicitors
Solicitor
Interaction
Comment
Help
Save
Cancel

Objective: Initial Meeting
Owner: Ornelas II, Mr. David A.
Stage: Qualification
Status: Completed
Expected date: 5/17/2021
Actual date: 5/17/2021

- LOCATION OF MEETING:
- PURPOSE:
- DETAILS OF GIFT/PLAN:
- HIGHLIGHTS OF MEETING:
- PERSONAL DETAILS:

Contact method: Initial Meeting
Category:
Subcategory:
Location:
Participants:

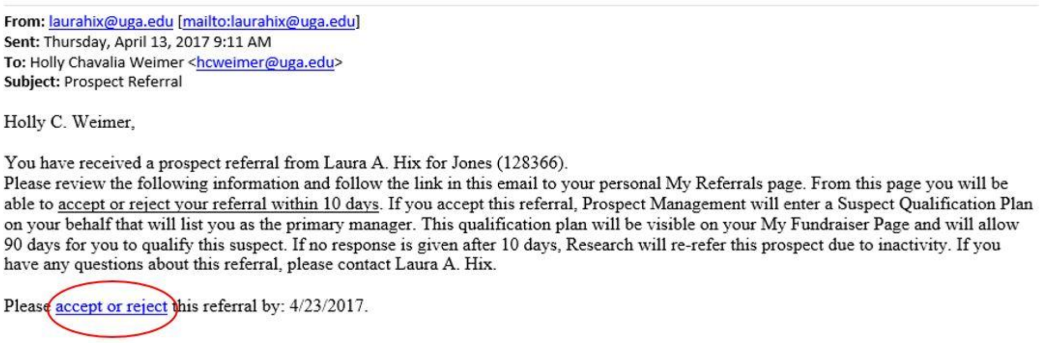
	Participant
*	

12.30 REFERRALS FROM PROSPECT RESEARCH

12.30.1 Receiving a Referral in GAIL

Once a referral has been made by a member of the Prospect 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).

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



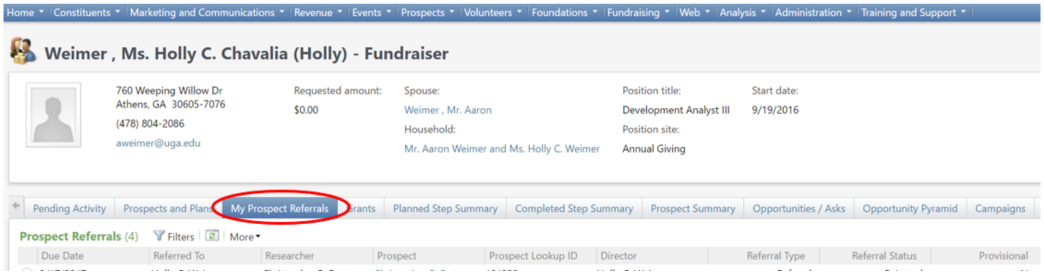
From: laurahix@uga.edu [mailto:laurahix@uga.edu]
Sent: Thursday, April 13, 2017 9:11 AM
To: Holly Chavalia Weimer <hcweimer@uga.edu>
Subject: Prospect Referral

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

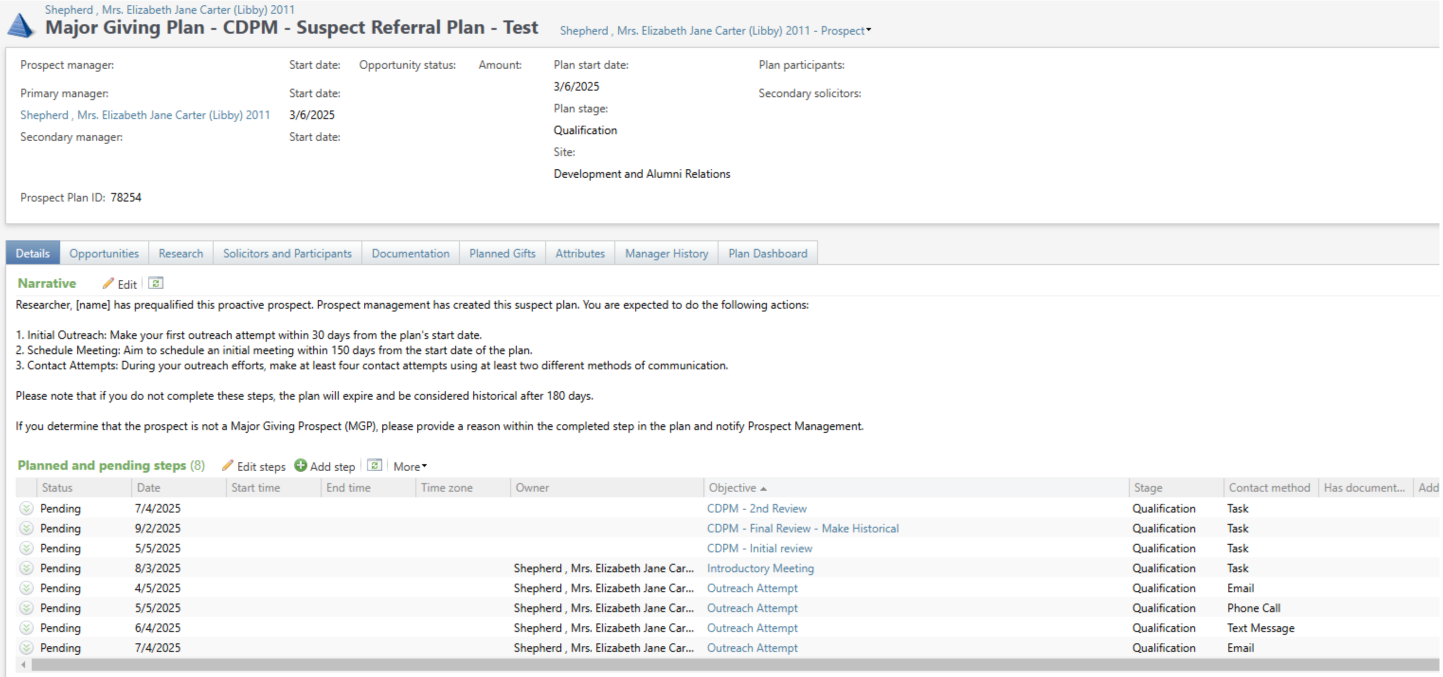
760 Weeping Willow Dr
Athens, GA 30605-7076
(478) 804-2086
aweimer@uga.edu

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

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 scheduled for 150 days, if not, the plan will be made historical after 180 days.



Shepherd , Mrs. Elizabeth Jane Carter (Libby) 2011

Major Giving Plan - CDPM - Suspect Referral Plan - Test Shepherd , Mrs. Elizabeth Jane Carter (Libby) 2011 - Prospect

Prospect manager:
Start date:
Opportunity status:
Amount:
Primary manager: Shepherd , Mrs. Elizabeth Jane Carter (Libby) 2011
Start date: 3/6/2025
Secondary manager:
Start date:
Plan start date: 3/6/2025
Plan stage: Qualification
Site: Development and Alumni Relations
Plan participants:
Secondary solicitors:
Prospect Plan ID: 78254

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

Researcher, [name] has prequalified this proactive prospect. Prospect management has created this suspect plan. You are expected to do the following actions:

1. Initial Outreach: Make your first outreach attempt within 30 days from the plan's start date.
2. Schedule Meeting: Aim to schedule an initial meeting within 150 days from the start date of the plan.
3. Contact Attempts: During your outreach efforts, make at least four contact attempts using at least two different methods of communication.

Please note that if you do not complete these steps, the plan will expire and be considered historical after 180 days.

If you determine that the prospect is not a Major Giving Prospect (MGP), please provide a reason within the completed step in the plan and notify Prospect Management.

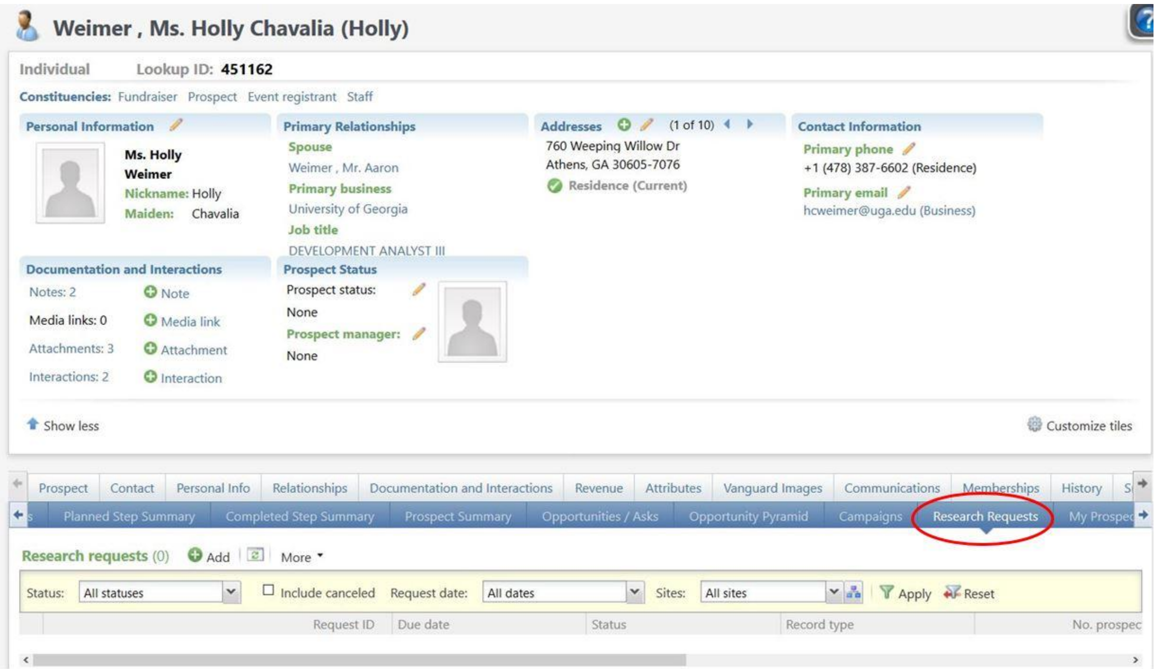
Planned and pending steps (8)
Edit steps
Add step
More

Status	Date	Start time	End time	Time zone	Owner	Objective	Stage	Contact method	Has document...	Add
Pending	7/4/2025					CDPM - 2nd Review	Qualification	Task		
Pending	9/2/2025					CDPM - Final Review - Make Historical	Qualification	Task		
Pending	5/5/2025					CDPM - Initial review	Qualification	Task		
Pending	8/3/2025				Shepherd , Mrs. Elizabeth Jane Car...	Introductory Meeting	Qualification	Task		
Pending	4/5/2025				Shepherd , Mrs. Elizabeth Jane Car...	Outreach Attempt	Qualification	Email		
Pending	5/5/2025				Shepherd , Mrs. Elizabeth Jane Car...	Outreach Attempt	Qualification	Phone Call		
Pending	6/4/2025				Shepherd , Mrs. Elizabeth Jane Car...	Outreach Attempt	Qualification	Text Message		
Pending	7/4/2025				Shepherd , Mrs. Elizabeth Jane Car...	Outreach Attempt	Qualification	Email		

12.31 RESEARCH REQUESTS IN GAIL

12.31.1 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.



Weimer , Ms. Holly Chavalia (Holly)

Individual Lookup ID: 451162

Constituencies: Fundraiser Prospect Event registrant Staff

Personal Information: Ms. Holly Weimer; Nickname: Holly; Maiden: Chavalia

Primary Relationships: Spouse: Weimer , Mr. Aaron; Primary business: University of Georgia; Job title: DEVELOPMENT ANALYST III

Addresses (1 of 10): 760 Weeping Willow Dr, Athens, GA 30605-7076; Residence (Current)

Contact Information: Primary phone: +1 (478) 387-6602 (Residence); Primary email: hcweimer@uga.edu (Business)

Documentation and Interactions: Notes: 2; Media links: 0; Attachments: 3; Interactions: 2

Prospect Status: Prospect status: None; Prospect manager: None

Research requests (0)

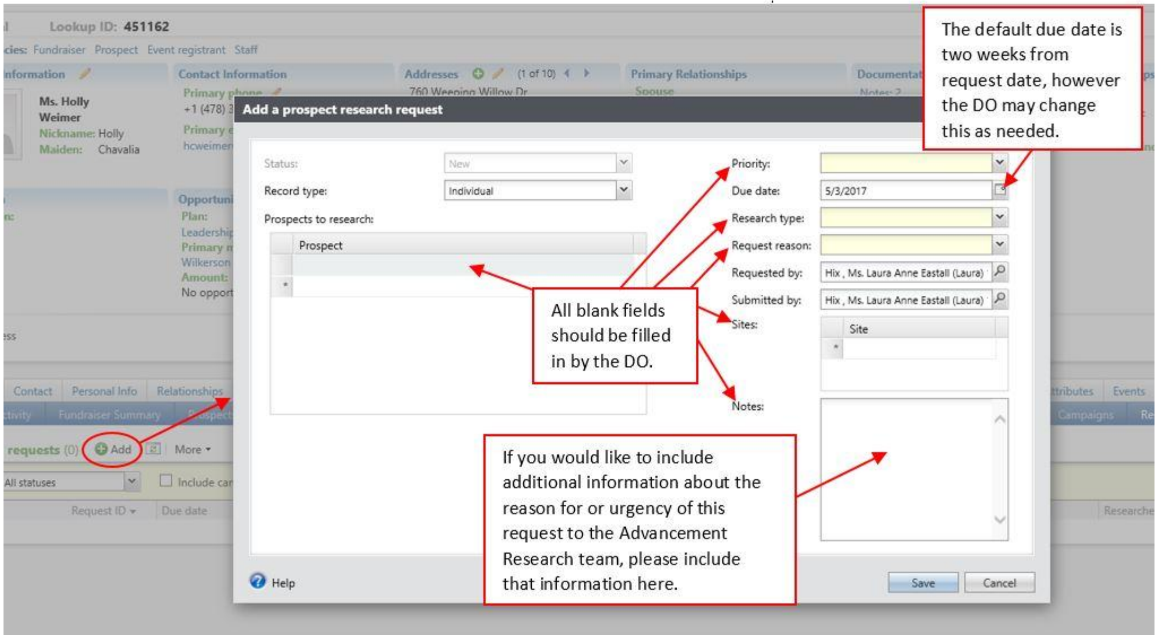
Status: All statuses; ☐ Include canceled; Request date: All dates; Sites: All sites

Note
Media link
Attachment
Interaction
Show less
Customize tiles
Prospect
Contact
Personal Info
Relationships
Documentation and Interactions
Revenue
Attributes
Vanguard Images
Communications
Memberships
History
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Research Requests
My Prospec
Add
More
Apply
Reset
Request ID
Due date
Status
Record type
No. prospec

12.31.2 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.



Add a prospect research request

Status: New

Record type: Individual

Prospects to research:

Priority:

Due date: 5/3/2017

Research type:

Request reason:

Requested by: Hix , Ms. Laura Anne Eastall (Laura)

Submitted by: Hix , Ms. Laura Anne Eastall (Laura)

Sites:

Notes:

The default due date is two weeks from request date, however the DO may change this as needed.

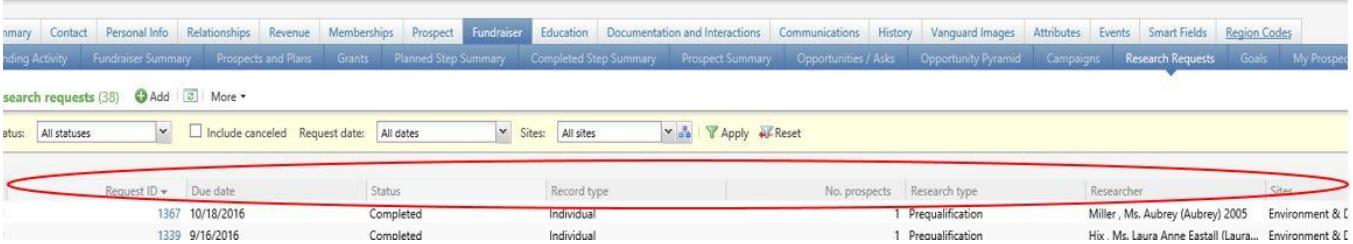
All blank fields should be filled in by the DO.

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
Site
Help
Save
Cancel
Add
More

12.31.3 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.


Contact
Personal Info
Relationships
Revenue
Memberships
Prospect
Fundraiser
Education
Documentation and Interactions
Communications
History
Vanguard Images
Attributes
Events
Smart Fields
Region Codes
Fundraiser Summary
Prospects and Plans
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Research Requests
Goals
Add
More
Apply
Reset

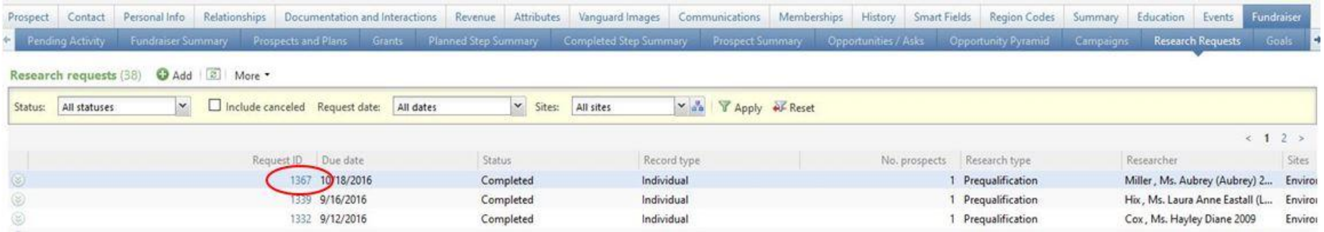
search requests (38)

atus: All statuses ☐ Include canceled Request date: All dates Sites: All sites

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 &
1339	9/16/2016	Completed	Individual	1	Prequalification	Hix , Ms. Laura Anne Eastall (Laura...	Environment &

12.31.4 Retrieving Your Research Request

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

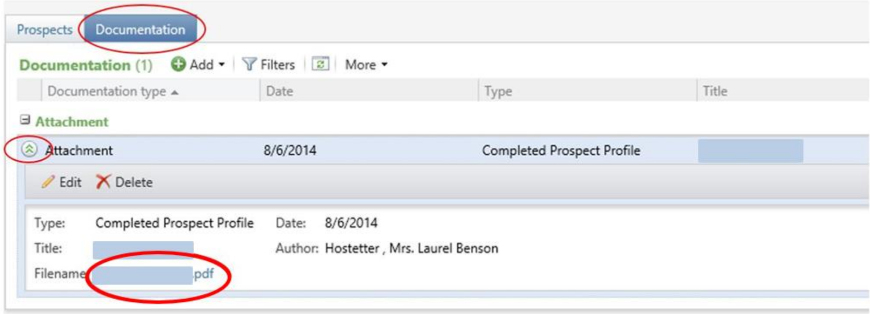

Prospect
Contact
Personal Info
Relationships
Documentation and Interactions
Revenue
Attributes
Vanguard Images
Communications
Memberships
History
Smart Fields
Region Codes
Summary
Education
Events
Fundraiser
Pending Activity
Fundraiser Summary
Prospects and Plans
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Campaigns
Research Requests
Goals
Add
More
Apply
Reset
< 1 2 >

Research requests (38)

Status: All statuses ☐ Include canceled Request date: All dates Sites: All sites

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) 2...	Enviro
1339	9/16/2016	Completed	Individual	1	Prequalification	Hix , Ms. Laura Anne Eastall (L...	Enviro
1332	9/12/2016	Completed	Individual	1	Prequalification	Cox , Ms. Hayley Diane 2009	Enviro

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.


Prospects
Documentation
Add
Filters
More
Edit
Delete

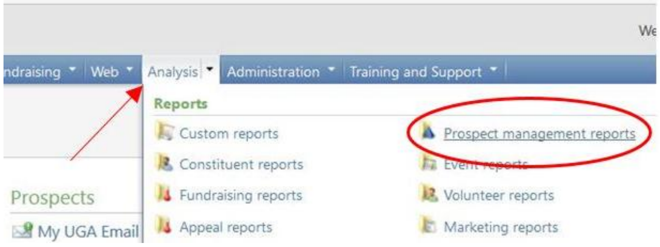
Documentation (1)

Documentation type	Date	Type	Title
Attachment			
Attachment	8/6/2014	Completed Prospect Profile	[redacted]

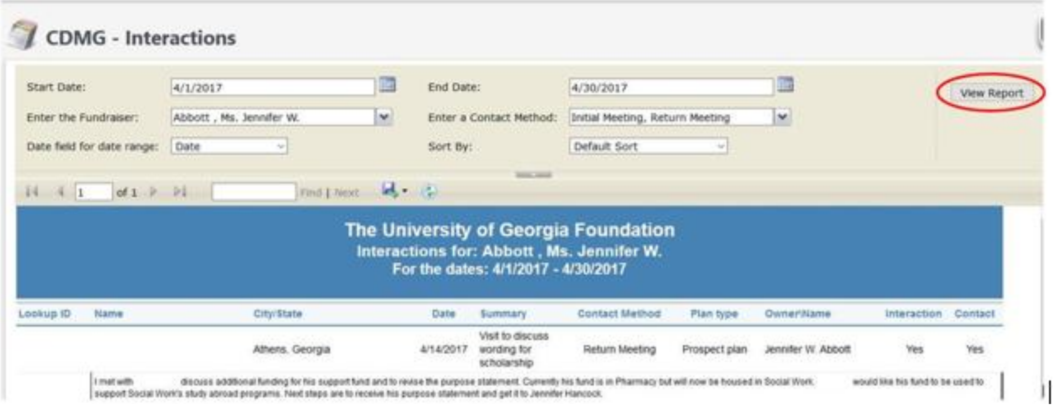
Type: Completed Prospect Profile
Date: 8/6/2014
Title: [redacted]
Author: Hostetter , Mrs. Laurel Benson
Filename: [redacted] pdf

12.32 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.


ndraising
Web
Analysis
Administration
Training and Support
Reports
Custom reports
Constituent reports
Fundraising reports
Appeal reports
Prospect management reports
Event reports
Volunteer reports
Marketing reports
Prospects
My UGA Email

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.


CDMG - Interactions
View Report
1 of 1
Find | Next

Start Date: 4/1/2017
End Date: 4/30/2017
Enter the Fundraiser: Abbott , Ms. Jennifer W.
Enter a Contact Method: Initial Meeting, Return Meeting
Date field for date range: Date
Sort By: Default Sort

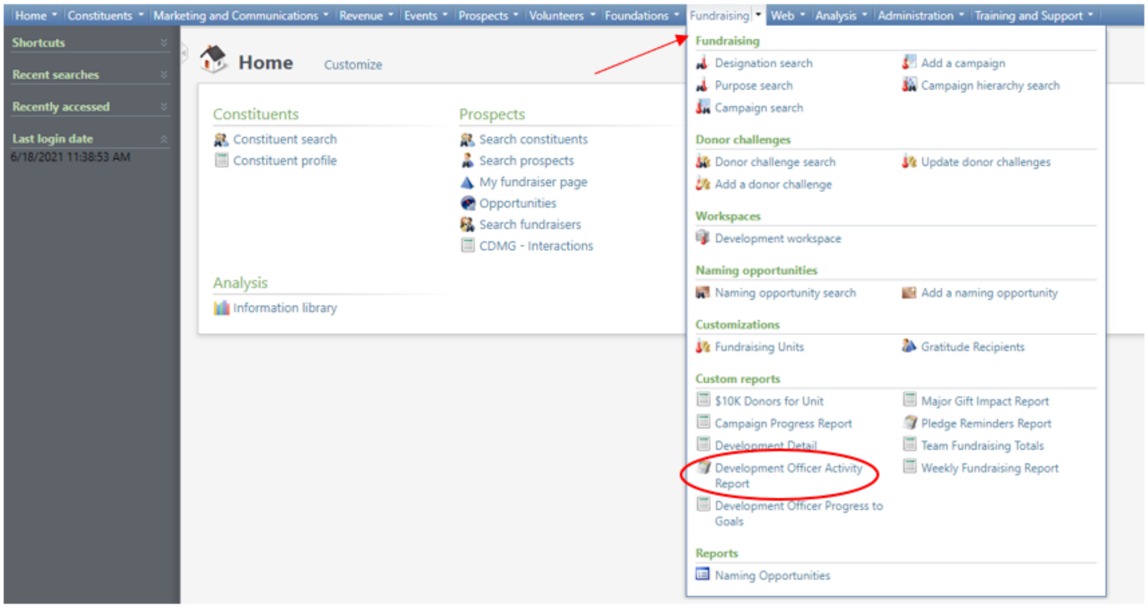
The University of Georgia Foundation
Interactions for: Abbott , Ms. Jennifer W.
For the dates: 4/1/2017 - 4/30/2017

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

I met with discuss additional funding for his support fund and to revise the purpose statement. Currently his fund is in Pharmacy but will now be housed in Social Work. would like his fund to be used to support Social Work's study abroad programs. Next steps are to receive his purpose statement and get it to Jennifer Hancock.

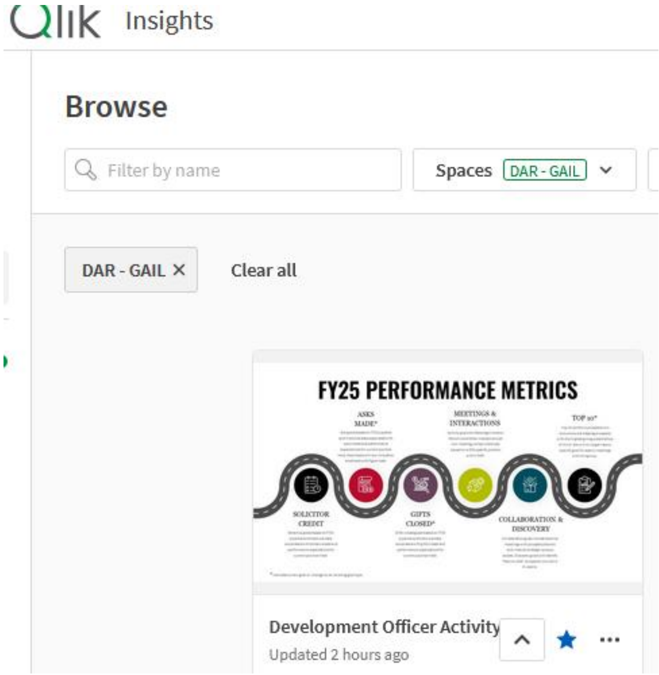
12.33 How to View Development Officer Activity Report

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.

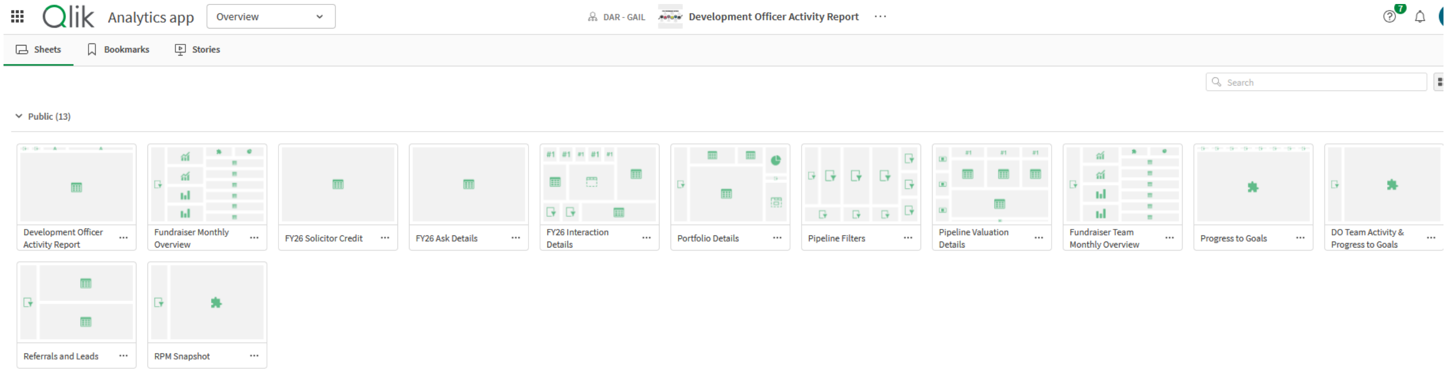

Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Volunteers
Foundations
Fundraising
Web
Analysis
Administration
Training and Support
Shortcuts
Recent searches
Recently accessed
Last login date
6/18/2021 11:38:53 AM
Home
Customize
Constituents
Constituent search
Constituent profile
Prospects
Search constituents
Search prospects
My fundraiser page
Opportunities
Search fundraisers
CDMG - Interactions
Analysis
Information library
Fundraising
Designation search
Purpose search
Campaign search
Add a campaign
Campaign hierarchy 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

12.34 Drilling Down in the Development Officer Activity Report

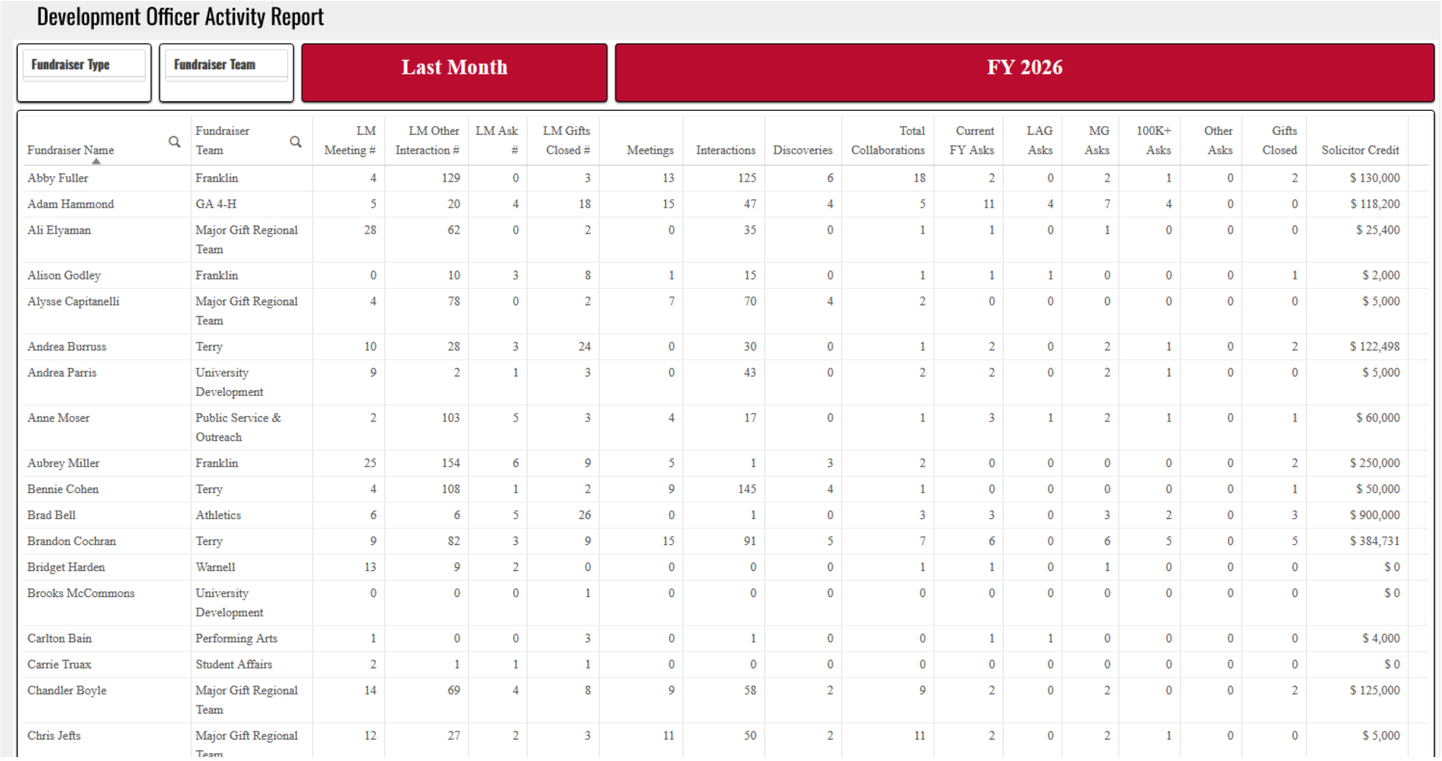
Go to https://uga-fad.us.qlikcloud.com and locate the Development Officer Activity Report App in the DAR – GAIL space.


Qlik Insights
Browse
Filter by name
Spaces DAR - GAIL
DAR - GAIL ✕
Clear all
FY25 PERFORMANCE METRICS
ASKS MADE*
MEETINGS & INTERACTIONS
TOP 10*
SOLICITOR CREDIT
GIFTS CLOSED*
COLLABORATION & DISCOVERY
Development Officer Activity
Updated 2 hours ago

Select the first sheet labeled “Development Officer Activity Report”, find and select your name.


Qlik Analytics app
Overview
DAR - GAIL
Development Officer Activity Report
Sheets
Bookmarks
Stories
Search
Public (13)
Development Officer Activity Report
Fundraiser Monthly Overview
FY26 Solicitor Credit
FY26 Ask Details
FY26 Interaction Details
Portfolio Details
Pipeline Filters
Pipeline Valuation Details
Fundraiser Team Monthly Overview
Progress to Goals
DO Team Activity & Progress to Goals
Referrals and Leads
RPM Snapshot

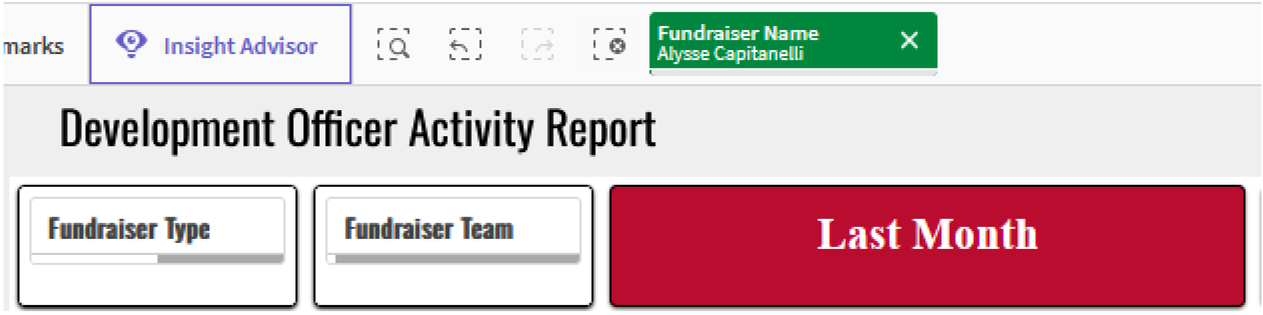
The list is sorted by Development Officer first name.



Development Officer Activity Report

Fundraiser Name	Fundraiser Team	LM Meeting #	LM Other Interaction #	LM Ask #	LM Gifts Closed #	Meetings	Interactions	Discoveries	Total Collaborations	Current FY Asks	LAG Asks	MG Asks	100K+ Asks	Other Asks	Gifts Closed	Solicitor Credit
Abby Fuller	Franklin	4	129	0	3	13	125	6	18	2	0	2	1	0	2	$ 130,000
Adam Hammond	GA 4-H	5	20	4	18	15	47	4	5	11	4	7	4	0	0	$ 118,200
Ali Elyaman	Major Gift Regional Team	28	62	0	2	0	35	0	1	1	0	1	0	0	0	$ 25,400
Alison Godley	Franklin	0	10	3	8	1	15	0	1	1	1	0	0	0	1	$ 2,000
Alysse Capitanelli	Major Gift Regional Team	4	78	0	2	7	70	4	2	0	0	0	0	0	0	$ 5,000
Andrea Burruss	Terry	10	28	3	24	0	30	0	1	2	0	2	1	0	2	$ 122,498
Andrea Parris	University Development	9	2	1	3	0	43	0	2	2	0	2	1	0	0	$ 5,000
Anne Moser	Public Service & Outreach	2	103	5	3	4	17	0	1	3	1	2	1	0	1	$ 60,000
Aubrey Miller	Franklin	25	154	6	9	5	1	3	2	0	0	0	0	0	2	$ 250,000
Bennie Cohen	Terry	4	108	1	2	9	145	4	1	0	0	0	0	0	1	$ 50,000
Brad Bell	Athletics	6	6	5	26	0	1	0	3	3	0	3	2	0	3	$ 900,000
Brandon Cochran	Terry	9	82	3	9	15	91	5	7	6	0	6	5	0	5	$ 384,731
Bridget Harden	Warnell	13	9	2	0	0	0	0	1	1	0	1	0	0	0	$ 0
Brooks McCommons	University Development	0	0	0	1	0	0	0	0	0	0	0	0	0	0	$ 0
Carlton Bain	Performing Arts	1	0	0	3	0	1	0	0	1	1	0	0	0	0	$ 4,000
Carrie Truax	Student Affairs	2	1	1	1	0	0	0	0	0	0	0	0	0	0	$ 0
Chandler Boyle	Major Gift Regional Team	14	69	4	8	9	58	2	9	2	0	2	0	0	2	$ 125,000
Chris Jefts	Major Gift Regional Team	12	27	2	3	11	50	2	11	2	0	2	1	0	0	$ 5,000

Each sheet focuses on separate reporting data from GAIL, and you can scroll through the sheets that will be sorted by your name if you have selected in and it shows in a green tab on the top.

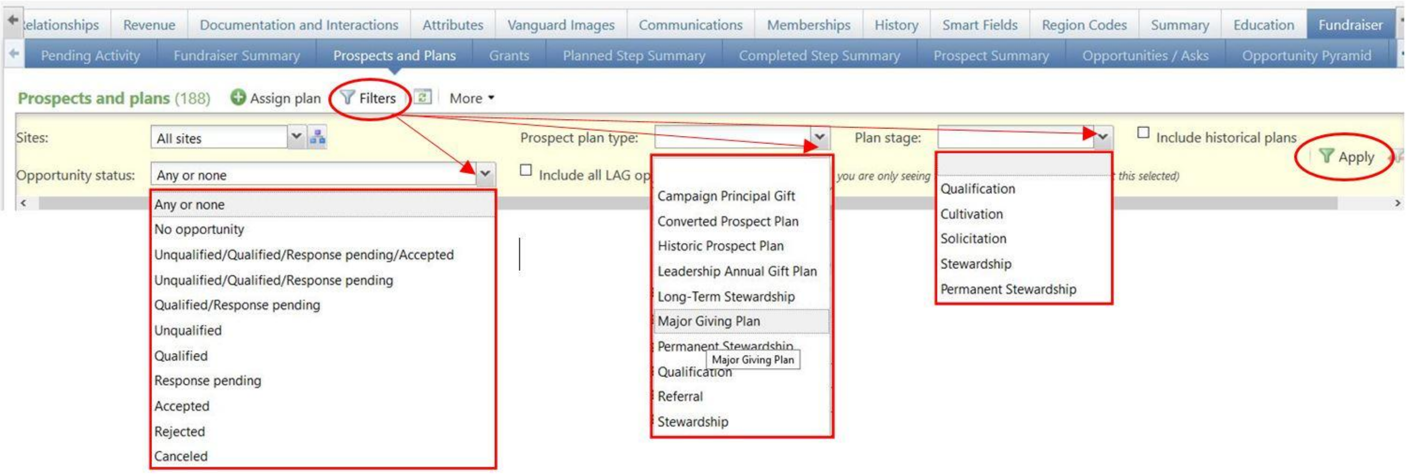


Fundraiser Name
Alysse Capitanelli

Development Officer Activity Report

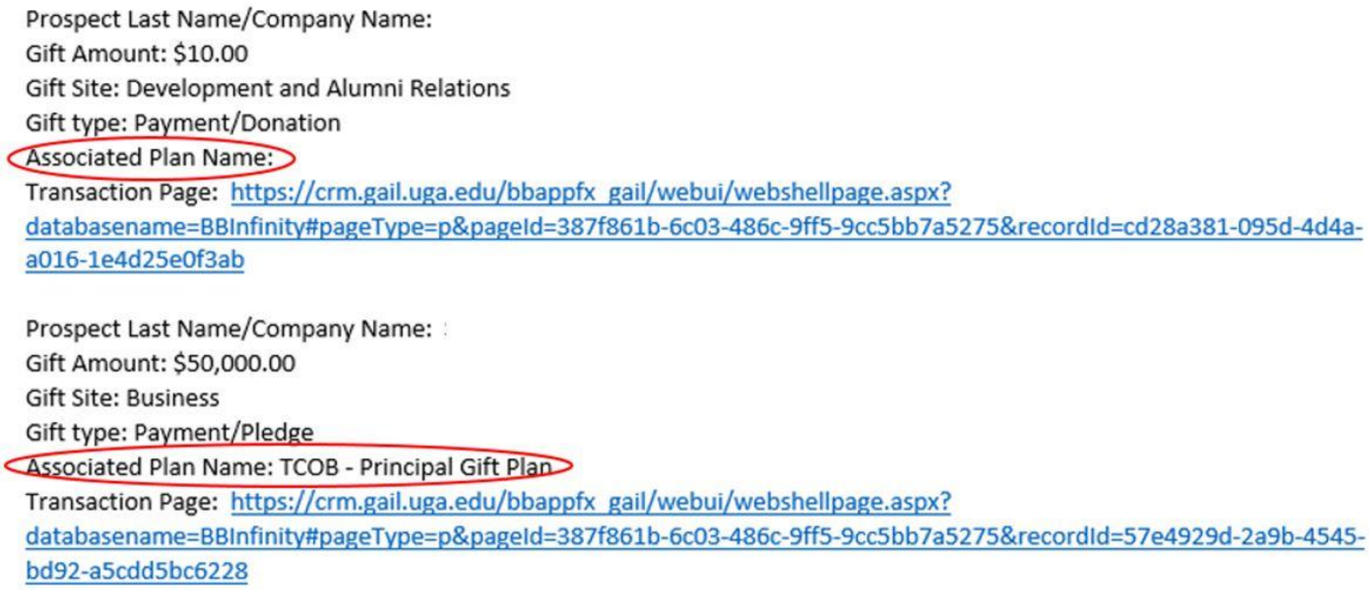
12.35 HOW TO SORT PLANS USING FILTERS ON YOUR MY FUNDRAISER PAGE

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.


Relationships
Revenue
Documentation and Interactions
Attributes
Vanguard Images
Communications
Memberships
History
Smart Fields
Region Codes
Summary
Education
Fundraiser
Pending Activity
Fundraiser Summary
Prospects and Plans
Grants
Planned Step Summary
Completed Step Summary
Prospect Summary
Opportunities / Asks
Opportunity Pyramid
Prospects and plans (188)
Assign plan
Filters
More
Sites:
All sites
Prospect plan type:
Plan stage:
☐ Include historical plans
Apply
Opportunity status:
Any or none
☐ Include all LAG op
you are only seeing
this selected)
Any or none
No opportunity
Unqualified/Qualified/Response pending/Accepted
Unqualified/Qualified/Response pending
Qualified/Response pending
Unqualified
Qualified
Response pending
Accepted
Rejected
Canceled
Campaign Principal Gift
Converted Prospect Plan
Historic Prospect Plan
Leadership Annual Gift Plan
Long-Term Stewardship
Major Giving Plan
Permanent Stewardship
Major Giving Plan
Qualification
Referral
Stewardship
Qualification
Cultivation
Solicitation
Stewardship
Permanent Stewardship

12.36 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

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