

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



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## Prospect Management Policies and Procedures

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### Overview of Prospect Management and Core Fundraising Values

#### 1.1 INTRODUCTION

The goal of the UGA Office of Prospect Management 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 Campaign Principal Gift (CPG) Plans and prospects
- Provide routine portfolio clean-up and maintenance assistance to Major Gift Officers
- Provide portfolio maintenance assistance to Leadership and Stewardship Officers as requested
- Monitor Major Giving Plan activity in GAIL to ensure proper prospect movement through the pipeline
- Monitor and review clearance requests in GAIL
- Review Meeting interactions entered into GAIL to ensure data integrity
- Assign Suspect Referral Plans based on accepted Research referrals
- Create reports and provide analytics support concerning prospect management and research functions
- Provide support to fundraisers regarding Prospect Management policy and GAIL database processes

## 2 PORTFOLIOS

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

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

### 2.1 PORTFOLIO SIZE AND DISTRIBUTION

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

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

### 2.2 LOCATING YOUR PROSPECTS IN GAIL

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

#### 2.2.1 My Fundraiser Page

A Development Officer's current prospects and plans can be found through the My Fundraiser Page in GAIL. By referring to the "Prospects and Plans" tab, a Development Officer can find a comprehensive list of all plans he or she is associated with, as well as a list of all prospects that the Development Officer is currently cleared to manage as Prospect Manager (A.1).

#### 2.2.2 "Prospects of" Groups

Development Officers can access a list of the constituents in their prospect list by using the search function to search for "prospects of (Development Officer name)." This group includes any prospects that the Development Officer manages, any prospects with plans by that Development Officer, and any participants on plans by that Development Officer. The group updates automatically every night in GAIL to add in any new prospects that have been assigned that day (A.5.1).

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

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whose plans have been made historical but may still need to be involved with the school, board or committee members, etc.) (A.5.2 and [A.5.3](#)).

**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 kept in a vacancy portfolio, reassigned to another team member, or dropped. Prospect Management will make these changes as soon as the Development Officer has vacated his or her role.

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

### 2.4 PROSPECT CONSTITUENCY

In order for a fundraiser to add a constituent to a portfolio, the record must first be assigned the Prospect Constituency (A.7).

#### 2.4.1 Prospect Status

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

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

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

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

## 3 FUNDRAISER ROLES

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### 3.1 OVERVIEW OF FUNDRAISER ROLES

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

#### 3.1.1 Prospect Manager

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

To that end, the Prospect Manager must:

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

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

#### 3.1.2 Primary Manager

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

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

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

#### 3.1.3 Secondary Manager

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

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

### **3.1.4 Secondary Solicitors**

The Secondary Solicitor role should be used if there are additional fundraisers assisting the Primary and Secondary Managers with a specific fundraising plan or if there are other influential or advisory parties, such as a Dean or Professor, involved in the solicitation of a prospect (A.8.9).

**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, he or she 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 (A.6).

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

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

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

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

### **3.2.2 Accepted Clearance Requests**

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

### **3.2.3 Rejected Clearance Requests**

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

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

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

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

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

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

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

Prospect Management's policy is that a Development Officer should only have clearance on one spouse/partner in a household. Spouses and Partners should always be listed as a "Plan Participant" where appropriate (5.5). Limited exceptions to this policy will be made at the direction of DAR Leadership.

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

## **4 TYPES OF PROSPECT PLANS**

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

A plan serves as a transparent and documented strategy for a Development Officer to achieve a specific fundraising objective with a prospect. It contains all of the important information concerning a potential gift and lays out the steps that a Development Officer will take to qualify, cultivate, solicit, and steward a prospect for a specific gift. A plan's purpose is to provide a transparent record of a Development Officer's intentions with a prospect and should be entered as soon as that objective is identified. GAIL provides several plan types for Development Officers to utilize based on desired development outcomes (A.8).

**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 (A.7).

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

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

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

#### **4.1.2 Campaign Principal Gift Plan**

A Campaign Principal Gift Plan in GAIL provides a documented strategy to cultivate and solicit a principal gift of at least \$1 million from a qualified prospect. Adding a Principal Gift plan to a prospect's record automatically

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places the prospect in the “Top Campaign Prospects” list, which is regularly discussed and reviewed by DAR Leadership. Therefore, it is imperative that a prospect is vetted and qualified for a gift at this level before entering an Opportunity for \$1 million or more.

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

### **4.1.3 Leadership Annual Gift Plan**

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

Leadership Annual Gift Plans are **not** “renewable” in that a Development Officer must establish an entirely new plan each fiscal year along with a new Opportunity (and steps to secure that gift) in the new plan.

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

### **4.1.4 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.

## 4.2 SUSPECT REFERRAL PLANS

After a Development Officer accepts a referral in GAIL from Research, Prospect Management will enter a Major Gift Plan in Qualification on the prospect's record. When entered by Prospect Management, Major Gift Plans will be titled "(site naming convention) – Suspect Referral Plan" and contain 6 steps:

Due Date	Step
30 days after plan start date	1 <sup>st</sup> Contact Attempt
45 days after plan start date	2 <sup>nd</sup> Contact Attempt (different contact method)
60 days after plan start date	Prospect Management Review – Make Historical if No Outreach
120 days after plan start date	Introductory Meeting
130 days after plan start date	"Fish or Cut Bait" – Establish Cultivation/Solicitation Plan
150 days after the plan start date	Prospect Management Review – Make Historical if No Initial Meeting

**Note:** Per Development Leadership, **at least two contact attempts, utilizing different contact methods**, are required before making a Suspect Referral Plan historical. If accurate information for two different contact methods is not available, please contact the referring Development Analyst to ask for alternative contact information.

### 4.2.1 Principal Gift Suspect Referral Plans

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

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

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

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

### 4.2.3 Overdue Suspect Referral Plans

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

### 4.2.4 Requesting Extensions on Suspect Referral Plans

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

#### 4.2.5 Referral Plans from the Office of Gift & Estate Planning

The Office of Gift & Estate Planning utilizes a major gift plan for specific types of planned giving referrals. A staff member from the Office of Gift & Estate Planning will enter one of these major gift plans on behalf of the major gift officer. The process for handling these plans is the same as other Suspect Referral Plans (4.2.2), except the Development Officer should email Megan Powell ([megafon@uga.edu](mailto:megafon@uga.edu)) in the Office of Gift & Estate Planning when making a plan historical.

## 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.8.2). When developing a thorough narrative, the fundraiser may include the following:

<i>Brief biographical sketch</i>	Includes information on family, professional background, education, and connections to UGA
<i>Evidence of wealth</i>	Includes a description of net worth or evidence of discretionary income; is there significant prior giving to UGA and other organizations?
<i>Readiness to give</i>	Includes any insights about factors that might affect the prospect's timing for committing to a major gift, including things like time limitations or family situations
<i>Strategy statement</i>	Includes 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 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 (A.8.3). 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	<b>Pending:</b> Use this for the step you plan to complete NEXT. A pending step triggers the stage of the plan, which signals where the prospect is in the development lifecycle. Pending steps will show on a Development Officer's "to do" task list.

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	<b>Planned:</b> Use this for any steps that you plan to complete beyond your next pending step. Planned steps do not show on Development Officer task lists until marked “pending.” <b>Completed:</b> 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 (A.1.1.1) or by utilizing the “Edit next step” section (A.1.1.3) when filing a contact report.

### 5.3 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 a stage depending on how the plan advances. Plan stages are based on a plan’s current pending step or the last completed step, if no pending step is available.

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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	
<b>5.3.1 Qualification</b>	5 months	During this stage, a Development Officer will generally have at least one face-to-face meeting with a prospect to determine interest and affinity, as well as to determine some level of capacity to make a major gift. Once the prospect has exhibited interest in and capacity for making a major gift, the plan can move into Cultivation. If those factors are not present, the Development Officer may either decide to focus on an annual giving strategy or "cut bait" and make the plan historical.
<b>5.3.2 Cultivation</b>	18 months	During this stage, a Development Officer will have multiple meaningful contacts (meeting, event contact, email, phone call, etc.) to move the prospect toward making a major gift. A qualified Opportunity should be added to the plan during this stage if one does not already exist. Once a Development Officer has had conversations with a prospect regarding specific interests to support as well as timing for the gift, the plan can move into Solicitation.
<b>5.3.3 Solicitation</b>	6 months	During this stage, a Development Officer will make an ask and/or submit a proposal for the prospect's consideration. The plan will remain in Solicitation until the prospect has either accepted or rejected the ask. After a response has been made to an ask or proposal submitted by the Development Officer, the plan can advance: <ul style="list-style-type: none"> <li>• if the ask was accepted, the plan can move into Stewardship if needed.</li> <li>• if the ask was rejected, the plan should either be made historical or move back into Cultivation if appropriate.</li> </ul> <b>Note:</b> Plans should not be made historical until all revenue, including matching gifts, has been committed.
<b>5.3.4 Stewardship</b>	12 months to 3 years	During this stage, a Development Officer will steward a prospect's gift by ensuring that they are properly thanked and kept updated on the impact of their gift. Approximately 30 days after revenue is associated, the Development Officer should review the plan and determine next steps: <ul style="list-style-type: none"> <li>• make the plan historical and start a new Major Gift Plan in appropriate stage with a future opportunity OR make the plan historical and add prospect to 'Prospect Of' group.</li> </ul>

## 5.4 PLANNED STEPS VS. PENDING STEPS

Each plan should have 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 should have a 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.

## 5.5 PLAN PARTICIPANTS

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

Plan Participants are those individuals who are closely linked to a prospect, such as spouses, children, family foundations, etc. A plan should include any family members and family foundations which are considered to be significant to UGA's relationship with a prospect. Partners/Spouses should be included as Plan Participants so that it is clear on both records that this couple is a prospect without the necessity of creating a plan for each spouse. Plan participants should not be confused with Team Members or Solicitors, which will always be UGA personnel or volunteers (A.8.8).

# 6 OPPORTUNITIES

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

## 6.1 WHEN TO ADD AN OPPORTUNITY

When a fundraiser determines through qualification that an ask should occur, a qualified Opportunity should be entered in GAIL (A.9). Note that all qualified, response pending, and accepted Opportunities are included in development pipeline reports. Opportunities are not required for plans in Qualification stage but are required as soon as a plan advances to the Cultivation or Solicitation stage. The Ask Amount, Timing, Designation, and Likelihood indeed may be "guess work" until the plan moves forward – but having an Opportunity documented on the plan is essential. The Opportunity variables are expected to evolve as a plan progresses.

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

## 6.2 COMPONENTS OF AN OPPORTUNITY

### 6.2.1 Status

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

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

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

*\*Included in pipeline reporting*

### 6.2.2 Opportunity Type

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



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### 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.

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

### 6.2.4 Expected Ask Date

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

### 6.2.5 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.

### 6.2.6 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.

### 6.2.7 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

### **6.2.8 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.

### **6.2.9 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.

### **6.2.10 Expected Close Date Attribute**

Within the Opportunity, an attribute called “Expected Close Date” can be used to record a Development Officer’s estimation of *when a gift will actually come in* rather than *when the ask is expected to occur* (A.9.1). While this field is not required, it can be a valuable tool for forecasting anticipated fundraising or cash flow revenues for the fiscal year.

## **6.3 SINGLE OPPORTUNITY VS. MULTIPLE OPPORTUNITIES**

The Prospect Management Team requires that a Development Officers enter only one Opportunity per plan. Opportunities are only required for Leadership Annual Gift, Major Gift, and Campaign Principal Gift plans in Cultivation or Solicitation.

## **6.4 MATCHING GIFTS**

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

### **6.4.1 Georgia Commitment Scholarship Matches**

If a Development Officer solicits a Major Gift that will take advantage of the Georgia Commitment Scholarship matching funds, the Opportunity should only be recorded as what the Development Officer will ask for, not including the matching amount (e.g. a \$50,000 ask will be matched at \$50,000 by the Woodruff Foundation funds, but the Expected Ask Amount would only be \$50,000). Once the Opportunity has been accepted and the revenue has been booked, an attribute will be added to each Opportunity by Gift Accounting.

**Note:** The reason these matches are treated differently than company matches is that the matching funds have already been given to UGA by the Woodruff Foundation, so the match money has already been counted in fundraising totals.

## 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 (A.10).

### 7.1 MEETING CONTACT METHODS

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

When entering a "Meeting" in GAIL, the following pieces of information are required in order for it to be counted in a Development Officer's monthly meeting totals (A.11.4).

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

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

#### 7.1.1 Initial Meeting

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

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

### **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.

#### **7.1.2.1 Stewardship Meeting**

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

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

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

## **7.2 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.”

### **7.2.1 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).

### **7.2.2 Email**

### **7.2.3 Event Interaction**

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

### **7.2.4 Fax**

### **7.2.5 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.

### **7.2.6 Letter**

### **7.2.7 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

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during the course of the board or committee meeting, the Interaction should still be entered as a “Board or Committee Interaction.”

### 7.2.8 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. ([11.23](#))

### 7.2.9 Phone Call

### 7.2.10 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 meetnig may or may not be the first time the President or Vice President have met the donor. This meeting will often include a Development Officer, who should enter his or her own interaction utilizing the Initial Meeting or Return Meeting contact method.

### 7.2.11 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.

### 7.2.12 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.”

### 7.2.13 Social Media

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

#### **7.2.14 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).

#### **7.2.15 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.

#### **7.2.16 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”).

#### **7.2.17 Text Message**

#### **7.2.18 Top Campaign Prospect Notes**

The “Top Campaign Prospect Notes” contact method is primarily used by the Principal Gifts Team to record notes about top campaign prospect strategy. Most Development Officers will not need to use this contact method.

#### **7.2.19 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.

### **7.3 CONTACT REPORT VS. INTERACTIONS NOT TIED TO A PLAN**

When entering Interactions into GAIL, it is important for Development Officers to distinguish between Interactions that are part of a plan and Interactions that are not tied to furthering a specific fundraising effort. GAIL defines Contact Reports as simply “interactions tied to a fundraising plan.” For any Interaction that is part of a fundraiser’s plan and can be considered to be moving the gift forward, a Contact Report needs to be filed. Contact Reports are filed by either completing a step within a plan or using the “Add step and interaction” feature on the prospect’s Interactions tab (A.11.2, A.11.3).

**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.

### **7.4 MEETINGS WITH MORE THAN ONE DEVELOPMENT OFFICER IN ATTENDANCE**

If more than one development professional participates in a meeting, each fundraiser should enter his or her own unique Contact Report to receive credit for the meeting in the Impact 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.

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**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.)

### 7.5 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 Impact Report, which is generally distributed by DAR Leadership on the second business day of the month. **Extensions will not be granted.** However, any interactions not entered by the monthly deadline will still be included in Fiscal Year totals.

#### 7.5.1 Major Gift Impact Report

The Major Gift Impact Report is an internal report distributed by DAR Leadership detailing Development Officers’ fiscal year-to-date progress. This report is focused on Major Gifts and Major Gift Officers, although some Leadership Annual Giving Officers are listed secondarily. The Impact Report transparently reports “Asks” for the fiscal year as well as revenue that has been committed to those opportunities, revenue committed to asks made in the prior fiscal year, revenue that is not associated with a plan but is credited to the Development Officer, monthly meeting and interaction totals, and fiscal year-to-date meeting and interaction totals (11.19, A.15).

## 8 PROSPECT MANAGEMENT TEAM STRUCTURE

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### 8.1 STAFF MEMBERS

Prospect Management personnel include:

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

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

**Holly Weimer**, Associate Director, Prospect Management  
[hcweimer@uga.edu](mailto:hcweimer@uga.edu)

**David Ornelas**, Prospect Management Specialist  
[dornelas@uga.edu](mailto:dornelas@uga.edu)

**Dajana Guerrero**, Prospect Management Specialist  
[dtopic@uga.edu](mailto:dtopic@uga.edu)

**Katalina Williams**, Prospect Management Specialist  
[kuwilliams@uga.edu](mailto:kuwilliams@uga.edu)

**Tanner Knox**, Prospect Management Specialist  
[knoxt@uga.edu](mailto:knoxt@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 work with Major Gift Officer portfolios. However, any Development Officer desiring help with portfolio clean-up and maintenance may reach out to his or her 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\*:

<b>Danielle Free</b>	<b>Holly Weimer</b>	<b>David Ornelas</b>	<b>Dajana Guerrero</b>	<b>Katalina Williams</b>	<b>Tanner Knox</b>
Principal Giving (Prisca Zaccaria, Kayla Hembree, Laura Hix)	Athletics (Prisca Zaccaria)	Honors Program (Ryan Kelly)	4-H (Matthew Alexander)	Graduate School (Matthew Mccauley)	Principal Giving (Prisca Zaccaria, Kayla Hembree, Laura Hix)
Corporate & Foundation Relations (Prisca Zaccaria)	CAES (Prisca Zaccaria, Mallory Moye)	CED (Mallory Moye)	Forestry (Ryan Kelly)	Parents & Leadership Giving (Laura Hix, Prisca Zaccaria)	Athletics (Prisca Zaccaria)
Office of the Vice President for Development and Alumni Relations (Prisca Zaccaria)	Ecology (Kayla Hembree)	Education (Matthew Alexander, Ryan Kelly)	Libraries (Matthew Alexander)	Public Health (Ian Buchanan)	PSO/Botanical Garden (Kayla Hembree, Ian Buchanan)
Regionals (Kayla Hembree, Margaret Armour)	Law (Ian Buchanan, Matthew Alexander)	Franklin (Prisca Zaccaria, Ian Buchanan, Matthew Mccauley)	Journalism (Mallory Moye, Ryan Kelly)	GMOA (Mallory Moye)	
Planned Giving (Prisca Zaccaria, Kayla Hembree)	Terry (Kayla Hembree, Ian Buchanan, Prisca Zaccaria)		PAC (Mallory Moye)	FACS (Matthew Mccauley)	
	Engineering (Mallory Moye, Matthew Mccauley)		Social Work (Matthew Alexander)	Student Affairs (Kayla Hembree)	
	Pharmacy (Ian Buchanan)		SPIA (Prisca Zaccaria, Matthew Alexander)	Vet Med (Kayla Hembree, Ryan Kelly, Mallory Moye)	

*\*as of 09/2019*



## 9 PORTFOLIO REVIEW MEETINGS

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### 9.1 QUARTERLY DIRECTOR MEETINGS

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

#### 9.1.1 Attendees

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

#### 9.1.2 Agenda Items

Prospect Management has developed a Snapshot which drives the majority of the meeting dialogue. This Snapshot focuses on the current fiscal year progress and each Development Officer's pipeline for the next 3 fiscal years. Items discussed will include (but will not be limited to):

1. Current portfolio size
2. Current portfolio balance and distribution
3. Open opportunities for the current year and those in the next 3 fiscal years
4. Referrals received from Research
5. Plans with No Significant Activity in Last 12 Months
6. Meetings and Interactions entered
7. Estimated giving capacity of prospects in the portfolio
8. Active plans with revenue committed
9. Portfolio valuation and revenue projection
10. "Response Pending" opportunities
11. Any questions that the Development Director may have for the Prospect Management Team

### 9.2 BI-ANNUAL TEAM MEETINGS

To provide all Major Gift Officers an opportunity to discuss portfolio progress with Prospect Management, Prospect Management Liaisons will meet with entire development teams during the 2<sup>nd</sup> and 4<sup>th</sup> quarters of the calendar year.

#### 9.2.1 Attendees

All Major Gift Officers are requested to attend their respective team meetings. Half-hour appointments will be scheduled for individual team members who may choose to attend their portion only or the entire team's session. Directors of Development are welcome to attend their team's meetings, as are any personnel who assist the team with data entry.

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

## 9.2.2 Sample RPM Agenda

# RPM Meeting Agenda



## Quarterly Portfolio Review Meeting – Q2 2019

Attendees	Director/Fundraiser; Supervisor; RPM; Nedra Newton Rosario
Date/Time	January 28, 2019; 10:00 a.m. – 11:00 a.m.
Location	Milledge Center

Topics for Discussion
<b>1) Development Officer Score Card</b> <ol style="list-style-type: none"> <li>Progress to goals</li> <li>Pipeline projection</li> <li>Pipeline development</li> <li>Plan/stage distribution</li> <li>Referrals (new/current)</li> </ol>
<b>2) Donor Engagement Process</b> <ol style="list-style-type: none"> <li>Prospects to keep (Update on recent actions. Discuss outcomes/next steps)</li> <li>Prospects needing reassignment</li> <li>Prospects to disqualify</li> <li>Upcoming Travel</li> <li>Miscellaneous Prospects</li> </ol>
<b>3) Portfolio Updates</b> <ol style="list-style-type: none"> <li>Clean up, as needed</li> <li>Old business</li> </ol>

## 10 ADVANCEMENT RESEARCH

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

### 10.1 INTRODUCTION

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

## Prospect Management Policies and Procedures

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

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

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

### 10.2 ADVANCEMENT RESEARCH SERVICES

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

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

#### 10.2.1 Referral Tracking System

One of the most crucial ways the Advancement Research Team partners with Prospect Management is through the Referral Tracking System. This system was custom-built to create and maintain a transparent record of all proactive prospects assigned to Development Officers as referrals by Research. Once a Referral is made by a Development Analyst through this system, the Major Gift Officer must accept or reject the Referral using the My Referrals tab (A.12). If accepted, Prospect Management adds the suspect to the Development Officer's portfolio by entering a Suspect Referral Plan.

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

## 11 FREQUENTLY ASKED QUESTIONS

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

Your portfolio includes any prospect that you are connected to as Prospect Manager, Primary Manager, Secondary Manager or Secondary Solicitor. You may access your portfolio at any time through your My Fundraiser Page in GAIL. You may also request a copy of your portfolio from your Liaison (2.2.1).

## **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 (A.5.2). For instructions on how to set up email alerts if you are not already receiving them, contact The Office of Client Services (11.21).

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

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

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

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

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

You may add a plan on anyone in GAIL, regardless of whether they already have the Prospect tab or not. If the person is not already labeled as a prospect, you will simply need to add the constituency to their record (A.7).

## **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 (A.8.10).

## **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 (0, 6.2.5).

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

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

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

When a prospect is added to your portfolio they are automatically added to your "Prospects of" group. You are then able to sign up to receive activity notifications on these prospects. One option is to receive notification when a gift has posted to your prospect's record. On that daily digest there is a field called 'Associated Plan Name', if this is blank the contribution has not been connected to a plan. If it is populated, that is the name of the plan that has the revenue tied to it (A.17).

### **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. (A.10)

**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 (A.9.2).

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

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

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

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

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

In order to see how many meetings or interactions you've completed within a specified time period, you can pull the "Custom Interactions Report" in GAIL. This report will allow you to view completed interactions by selecting a specific time period as well as specific interaction contact methods (A.13).

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

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

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

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

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

The Impact Report is an internal report distributed on a monthly basis by DAR Leadership showing a tally of gifts raised as well as meetings and other interactions completed (A.15). The Prospect Management Team can assist Development Officers with general questions about the Impact Report and help associate revenue if necessary, pending Senior Director approval. However, because the majority of questions about the Impact Report involve solicitor credit, Impact Report questions should be directed to the Senior Directors of Development for Constituent Programs first, with the Prospect Management Team providing support if necessary.

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

The Prospect Management Team provides several reports for review during quarterly meetings with Development Officers. A Snapshot is provided during standing meetings, and reports addressing data integrity will be sent by the Prospect Management Liaison on a monthly basis. A Development Officer may request information from any of these reports at any time by contacting his or her Liaison (9.1.2, 9.2.2).

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

- If you would like a list pulled for your prospecting and cold-calling purposes, submit a request with your specific criteria to AskIT ([askit@uga.edu](mailto:askit@uga.edu)).
- If you need any information on a constituent's record updated, contact Records ([records@uga.edu](mailto:records@uga.edu)).
- If you have questions about how to complete specific tasks in GAIL, contact The Office of Client Services ([askit@uga.edu](mailto:askit@uga.edu)).
- If you need an explanation of wealth scores or have questions about the specific research products that the Research team can offer to Development Officers, contact the Senior Director of Advancement Research, Prisca Zaccaria ([prisca@uga.edu](mailto:prisca@uga.edu)).
- If you have a question about revenue being correctly tied to an Opportunity, contact your Senior Director for Constituent Programs (Brooks McCommons or Kathy Bangle) and/or your RPM Liaison ([8.2](#)).

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

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

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

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

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

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

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

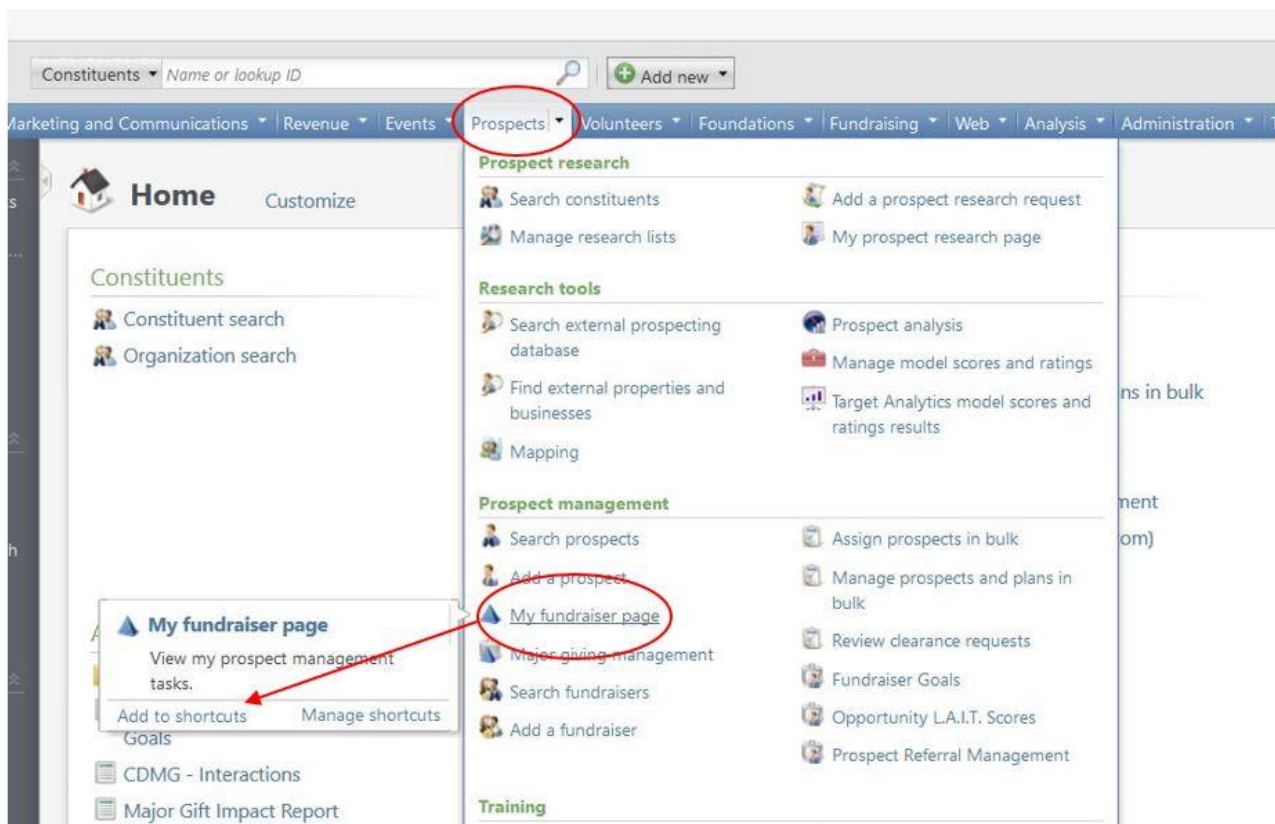
No, the meeting interaction will be on the Prospect in which the meeting was originally scheduled. You can add the guest as an interaction participant or have an 'Other' interaction on the guest's profile. You will only receive Meeting credit for one of the Prospects.

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

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

## **A.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.



## Prospect Management Policies and Procedures

You can also access this page by navigating to your personal constituent record in GAIL and clicking on your “Fundraiser” constituency link.

### A.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 ▾

**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  
Start date: 9/19/2016  
Position site: Annual Giving

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

**Prospects and plans (2)** + Assign plan Filters More ▾

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

#### A.2.1 Prospects and Plan Section

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

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

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

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

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

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

**Prospects and plans (2)** + Assign plan Filters More ▾

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

#### A.2.2 Prospect Assignments Section

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



## Prospect Management Policies and Procedures

Prospect assignments (2) Add Filters More						
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

### A.3 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

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

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

Requested amount: \$0.00  
Spouse: Weimer, Mr. Aaron  
Household: Mr. Aaron Weimer

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

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

Pending activity (3) Filters More

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

Search Columns Clear all filters

Constituent	Expected date	Objective	Plan type	Plan stage	Owner	Contact method	Has documentati...	Additional solicit...	Sites
Wilkerson, Mrs. Lau...	4/11/2017	Initial Meeting	Qualification	Qualification	Weimer, Ms. Holly C...	Letter	No	No	
Lamm Jr., Mr. Leon T...	4/22/2017	Make Initial Contact	Qualification	Qualification	Weimer, Ms. Holly C...	Task	No	No	Developm
Weimer, Mr. Aaron	9/12/2017	Qualification	Major Giving Plan	Cultivation	Weimer, Ms. Holly C...	Task	No	No	

### A.4 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 A.12.

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

**Weimer, Ms. Holly C. Chavalía (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  
Start date: 9/19/2016  
Position site: Annual Giving

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
3/17/2017	Holly C. Weimer	Christopher B. Patten	Christopher B. Patten	191322	Holly C. Weimer	Referral	Rejected	No
3/17/2017	Holly C. Weimer	Holly C. Weimer	Aaron Weimer	10670060		Referral to Director	Pending	No
3/19/2017	Holly C. Weimer	Aaron Weimer	Aaron Weimer	10670060		Referral	Pending	No
4/23/2017	Holly C. Weimer	Laura A. Hix	David S. Jones	128366		Referral	Pending	No

## A.5 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.

### A.5.1 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.

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

**Tasks**

- + Add clearance request
- + Add Prospects of Jennifer Messer (jlmesser) to a group
- Edit group
- Write a letter

**More information**

- Wealth and ratings

**Reports**

- Constituent profile
- Constituent Credit Total
- Prospect Summary Briefing
- Top Campaign Strategy Profile

**Constituent Revenue Information Page Reports**

- Constituent Revenue Information Page
- Constituent Credit Total

**Shortcuts**

- Add this page to

**Prospects of Jennifer Messer (jlmesser)**

Group Lookup ID: 10686020

**Group Information**

Description

Created on 7/31/2014

**Group Members**

Primary member

Adamson Jr., Mr. Walter Clay (Clay) 1960

154 current members

236 former members

**Memberships (1 of 13)**

Friends of the State Botanical Garden

Barrow, Mrs. Diana Kathryn Deas (Dia...

ID: 8-10000947 Status: Active

Expiration: 5/31/2113

Level: Board of Advisors

Member since: 5/11/2014

Show less Customize tiles

**Members** Contact Details Relationships Documentation and Interactions Revenue Attributes Vanguard Images Communications Memberships History Smart Fields Region Codes

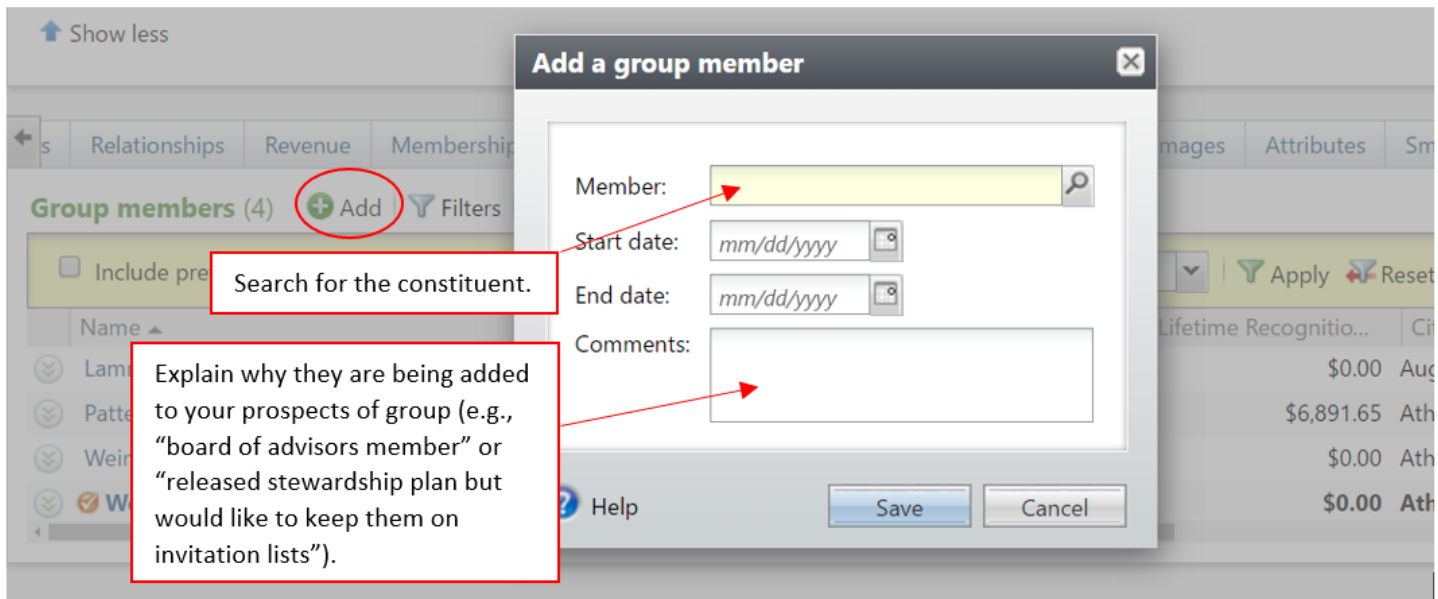
**Group members (154)** Add Filters More

Name	Top LAIT score	FY Recognition Total	Lifetime Recognition	City	State	Start date	End date	Role
Adamson, Mr. Reggie	2.50	\$0.00	\$0.00	Savannah	Georgia			Plan Participant Only
Adamson, Mrs. Donna Leigh Ratchfor...	57.50				Georgia	4/25/20...		
Adamson Jr., Mr. Walter Clay (Clay)...	34.00				Georgia	9/5/2014		
Anderson, Mr. Richard Nunnelee (Rick...	54.00				Georgia	2/6/2015		
Anne Daigh Landscape Architect	0.00				Tennessee	8/17/20...		
Armstrong, Mr. Brent Dewitt 1972	33.50				Georgia			
Armstrong, Ms. Nancy Anne Andrews ...	1.50	\$0.00	\$0.00	Atlanta	Georgia			Plan Participant Only

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

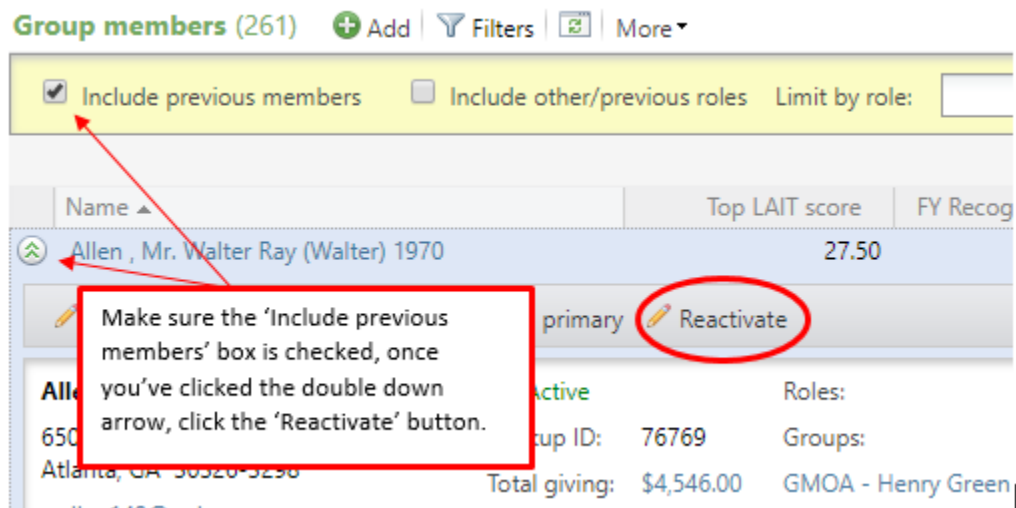
### A.5.2 Manually Adding Prospects

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.



### A.5.3 Reactivating Previous Members

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



## A.6 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
- W

**View**

- Application user

**More information**

- Wealth and ratings

**Reports**

- Constituent profile
- Constituent Credit
- Prospect Summary Briefing
- Top Campaign St Profile

**Constituent Revenue Information Page Reports**

**Individual**

**Constituencies:**

**Personal Information**

**Primary Relationship**

**Spouse**

Wilkerson , Mr. t

**Household**

**Blackbaud**

Prospect: Wilkerson , Mrs. Laura Catherine For

Prospect Manager: [Search]

Strategy: [Search]

Personal visit completed ? : No

If no, explain:

Interests:

Funding Interest
------------------

Save Cancel

Total recognition: \$120.00 Total revenue:

## A.7 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.

**Wilkerson , Mrs. Laura Catherine Ford 2008**  
 Individual    Lookup ID: 388381

**Constituencies:** Alumnus   Donor   Fundraiser   Recognized donor   Event registrant   Staff

**Personal Information**  
 Mrs. Laura Catherine Wilkerson  
 Nickname: Wilkerson  
 Maiden: Ford

**Primary Relationships**  
 Spouse: Wilkerson , Mr. Gabriel  
 Primary business: University of Georgia  
 Job title: DEVELOPMENT ANALYST III

**Addresses** (1 of 14)  
 260 Woodcrest Dr  
 Athens, GA 30606-2338  
 Residence (Current)

**Contact Information**  
 Primary phone: +1 662-518-1408 (Cell)  
 Primary email: lcf29@uga.edu (Business)

**Constituencies (6)** **Add**

Desc	Advocate	Date from	Date to	Active
Alum	Board member	5/10/2008		✓
Dono	Staff	3/31/2015		✓
Event	Fundraiser	12/15/2016		✓
Fundr	Prospect	3/1/2014		✓
Recog	Volunteer	7/31/2016	6/30/2017	✓
Staff	User-defined	3/1/2014		✓

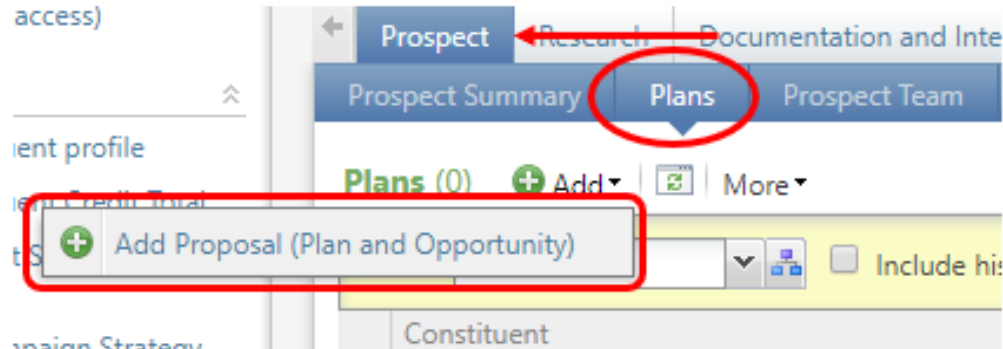
**Constituency managers (0)** **Add**

Manager

## A.8 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.



### A.8.1 How to Enter Plan Details

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

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

The screenshot shows the 'Add a Proposal (Plan and Opportunity)' form. The 'Plan Information' section contains several fields. Annotations with red boxes and arrows point to specific fields:

- A red box with the text "Provide a concise and descriptive name for your plan. Always begin plans with your unit's official naming convention (i.e. "CDMG – Need Based Scholarship")." points to the 'Plan name' field.
- A red box with the text "Your strategy should provide detailed information about the plan for your plan as well as timing and purpose for the gift." points to the 'Strategy' text area.

Other visible fields include 'Plan type', 'Start date' (set to 2/1/2019), 'Primary manager' (Weimer, Ms. Holly C. Chavali), 'Secondary manager', and 'Stage' (set to Major Giving Plan). The 'Strategy' field is highlighted in yellow. At the bottom right, there are 'Save' and 'Cancel' buttons.



### A.8.2 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."*

### A.8.3 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 opportunity appears. If Solicitation is selected there are few more options with status, ask amount date. The yellow highlighted fields are required.

**Add a Proposal (Plan and Opportunity)**

**Plan Information**

Plan name: CDMG - Need Based Scholarship Primary manager: Weimer, Ms. Holly C. Chavali Start date: 2/1/2019

Plan type: Major Giving Plan Start date: 2/1/2019 Secondary manager: Start date: mm/dd/yyyy

Stage: Cultivation

Note: Opportunity information is required for cultivation and solicitation stages

Strategy:

**Opportunity Information**

Status: Qualified

Expected ask amount: \$0.00 Expected ask date: mm/dd/yyyy

Likelihood:

Comments:

Low - Interest is unclear and/or priorit...  
Medium - confirmed interest, nonco...  
Strong - high confidence of commitm...

Save Cancel

'Qualified' is the default and only option when the selected stage is 'Cultivation'.  
Expected Ask Amount must be larger than \$0.00.

## Prospect Management Policies and Procedures

**Add a Proposal (Plan and Opportunity)**

**Plan Information**

Plan name: CDMG - Need Based Scholarship Primary manager: Weimer, Ms. Holly C. Chavali Start date: 2/1/2019

Plan type: Major Giving Plan Start date: 2/1/2019 Secondary manager: Start date: mm/dd/yyyy

Stage: Solicitation

Note: Opportunity information is required for cultivation and solicitation stages

Strategy:

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

**Opportunity Information**

Status: Response pending

Expected ask amount: Qualified

Ask amount: Response pending

Likelihood: Accepted

Comments: Rejected

Expected ask date: mm/dd/yyyy

Ask date: mm/dd/yyyy

Save Cancel

### A.8.4 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.

Details Opportunities Research Solicitors and Participants Documentation Planned Gi

**Narrative** Edit

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

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

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

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

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



### A.8.5 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:

Steps from plan outline

Required fields when entering a step

To add a comment to your step, click here.

Update status to:

Insert Delete Edit additional details

Expect...	Expect...	Expect...	Time zo...	Objective	Owner	Stage	Status	Actua...	Contact...	Category	Subcat...	Additio...	Particip...
*													

### A.8.6 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**

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

Outlines:

Steps from plan outline

Select the appropriate plan outline

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

Update status to:

Insert Delete

Expected date	Objective	Owner	Stage	Status	Actual date	Contact method	Category	Subcate
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) Adjust dates

Help Save Cancel

### A.8.7 How to Change the Step Status

#### A.1.1.1 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.”

## Prospect Management Policies and Procedures

**Edit a step for Wilkerson, Mrs. Laura Catherine Ford 2008**

**Detail**

Objective: Qualification  
 Owner: Wilkerson, Mrs. Laura Catherine  
 Stage: Qualification  
 Status: Pending  
 Expected date: Pending  
 Actual date: Completed  
 Comment: Cancelled  
 Declined

**Additional solicitors**

Solicitor: [Empty]  
 Interaction: [Empty]  
 Contact Method: Task  
 Category: [Empty]  
 Subcategory: [Empty]  
 Location: [Empty]  
 Participants: [Empty]

Save Cancel

### A.1.1.2 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.

**Edit steps for Wilkerson, Mrs. Laura Catherine Ford 2008 - CDPM - Test**

Plan type: Major Giving Plan Site: Development and Alumni Relations Outlines: [Empty] Add steps from plan outline

**Steps**

Select all Clear all Update status to: [Empty] Insert Delete Edit additional details

Expected date	Objective	Owner	Stage	Status	Actual date	Category	Subcategory	Additional solicitors
10/20/2017	Qualification	Wilkerson, ...	Qualification	Pending		Planned		
10/20/2018	Cultivation	Wilkerson, ...	Cultivation	Planned		Pending		
4/20/2019	Solicitation	Wilkerson, ...	Solicitation	Planned		Completed		
5/21/2019	Thank you ...	Wilkerson, ...	Stewardship	Planned		Cancelled		
						Declined		

Adjust expected dates: Forward 1 Day(s) Adjust dates


Save Cancel

### A.1.1.3 Utilize “Edit Next Step” Feature When Filing a Contact Report

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

The screenshot shows a form titled "Next step in prospect plan". At the top is a large yellow "Comment:" text area. Below it is a section titled "Next step in prospect plan" containing a checkbox labeled "Edit next step information". To the right of this checkbox is a status dropdown menu currently set to "Planned". A red oval encircles the checkbox and the status dropdown. Two red callout boxes with arrows point to these elements: one says "Check this box" pointing to the checkbox, and the other says "Change status here" pointing to the status dropdown. Below the checkbox are fields for "Objective:" (with a text input "Check out the next planned step"), "Owner:" (with a dropdown "Weimer, Ms. Holly C. Chavalia"), "Expected date:" (with a date input "4/11/2017"), and "Actual date:" (with a date input "mm/dd/yyyy"). At the bottom are "Save" and "Cancel" buttons.

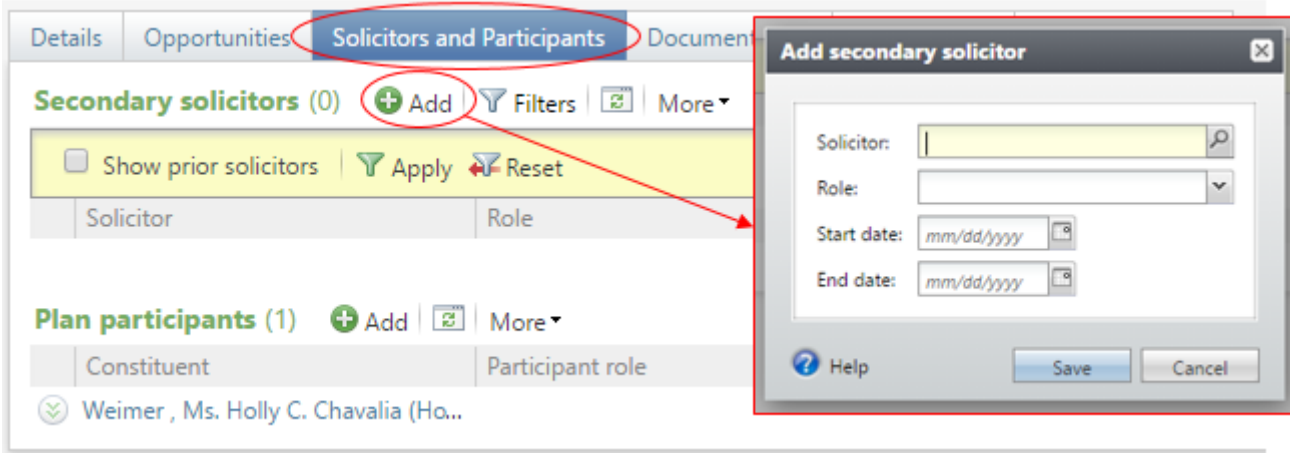
### A.8.8 How to Add a Plan Participant (Within the Plan)

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

The screenshot shows the "Solicitors and Participants" tab selected. It contains two sections: "Secondary solicitors (0)" and "Plan participants (1)". The "Plan participants" section has a red circle around its "+ Add" button. A red arrow points from this button to an open "Add plan participant" dialog box. The dialog box has fields for "Constituent:" (a dropdown with a search icon) and "Role:" (a dropdown). At the bottom of the dialog are "Help", "Save", and "Cancel" buttons.

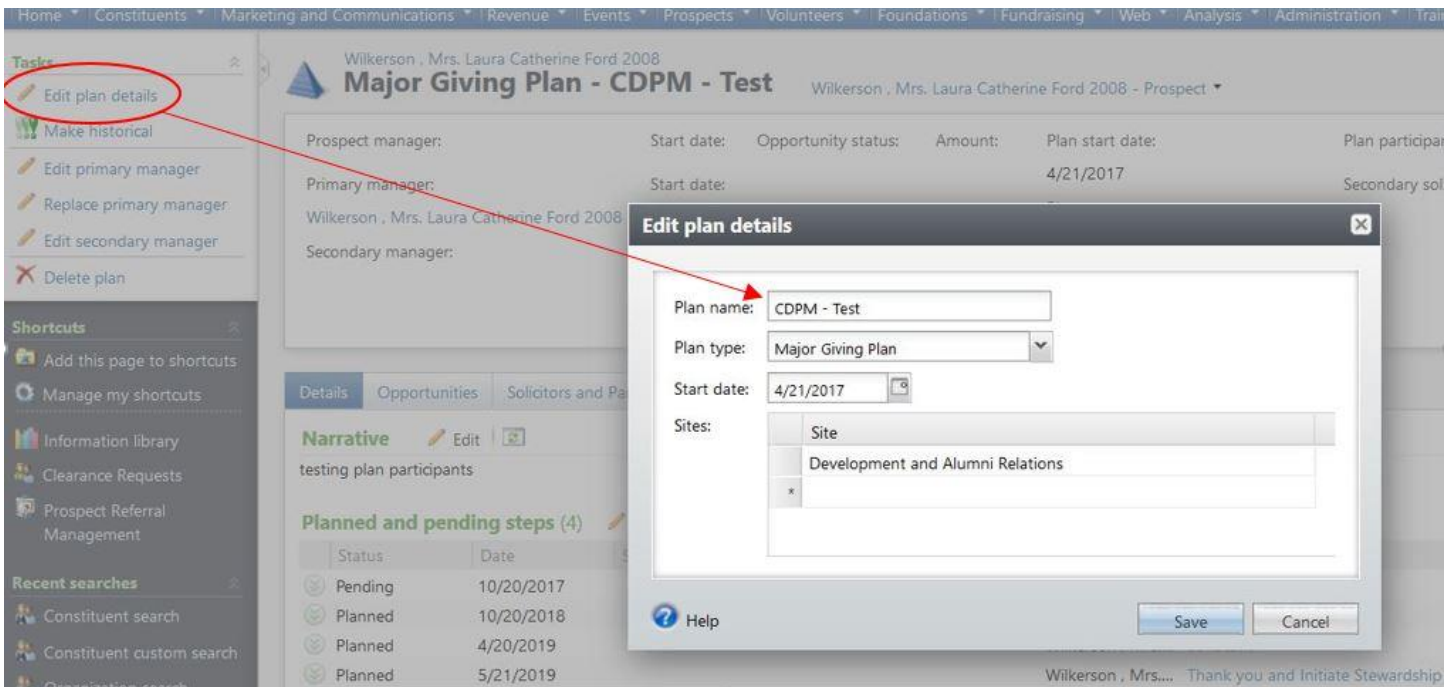
### A.8.9 How to Add a Secondary Solicitor (Within the Plan)

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




### A.8.10 How to Edit Plan Name After Plan Has Been Created

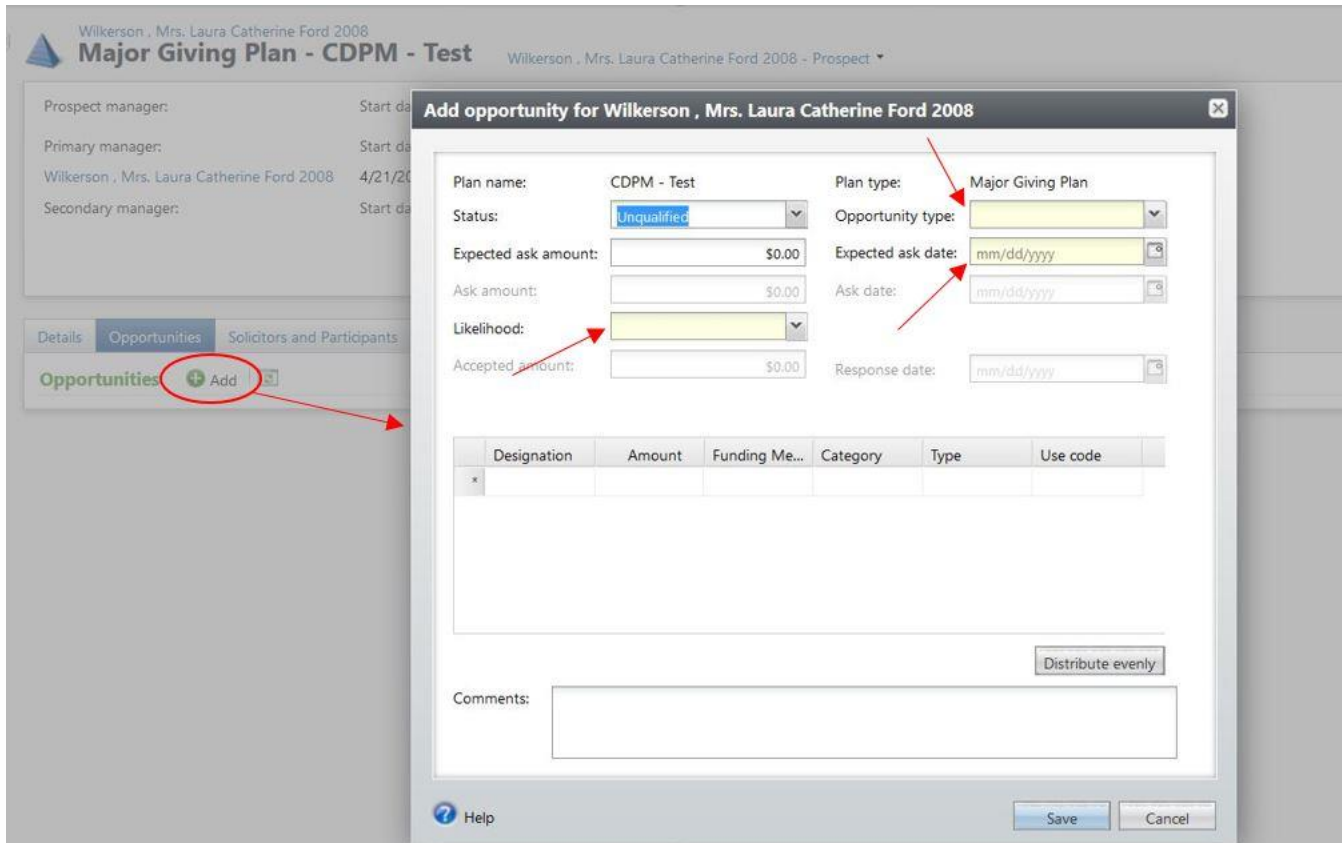
Inside the plan that you want to edit, on the left hand side of the screen, under the Task list, click the “Edit plan details” option.



## A.9 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 yellow cells are required fields.


**NOTE:** Only after the Ask has been made should you include the Ask Date and Ask Amount.




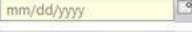



Wilkerson, Mrs. Laura Catherine Ford 2008  
Major Giving Plan - CDPM - Test

Prospect manager: Start date  
Primary manager: Start date  
Wilkerson, Mrs. Laura Catherine Ford 2008 4/21/2017  
Secondary manager: Start date

Details Opportunities Solicitors and Participants

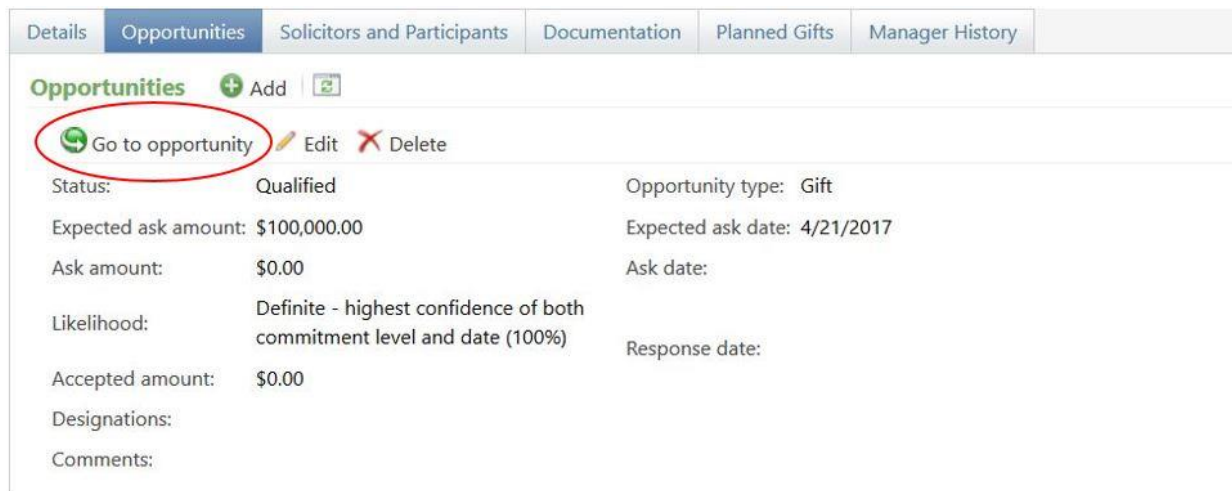
Opportunities  Add

**Add opportunity for Wilkerson, Mrs. Laura Catherine Ford 2008**



Plan name: CDPM - Test Plan type: Major Giving Plan  
Status: Unqualified Opportunity type:   
Expected ask amount: \$0.00 Expected ask date:   
Ask amount: \$0.00 Ask date:   
Likelihood:   
Accepted amount: \$0.00 Response date:   
Distribute evenly  
Comments:   
Save Cancel




### A.9.1 Expected Close Date Attribute

The "Expected Close Date" attribute (6.2.10) is a great way to help with forecasting or to show that a gift will be received in a different fiscal year than what the response date indicates.



Details Opportunities Solicitors and Participants Documentation Planned Gifts Manager History


Opportunities  Add 

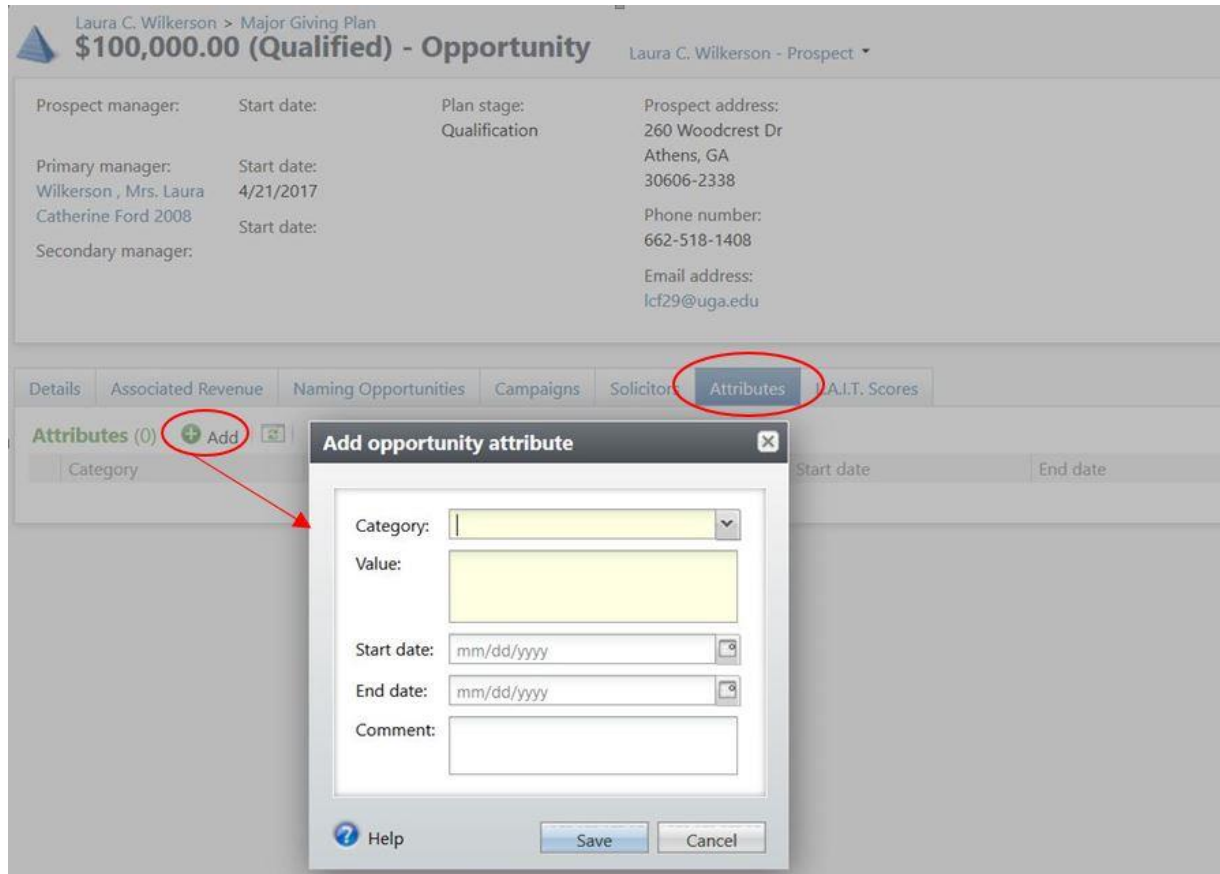
 Go to opportunity  Edit  Delete

Status:	Qualified	Opportunity type:	Gift
Expected ask amount:	\$100,000.00	Expected ask date:	4/21/2017
Ask amount:	\$0.00	Ask date:	
Likelihood:	Definite - highest confidence of both commitment level and date (100%)	Response date:	
Accepted amount:	\$0.00		
Designations:			
Comments:			



## Prospect Management Policies and Procedures



Once in the “Opportunity,” click on the “Attributes” tab and then click the  **Add** button.



Laura C. Wilkerson > Major Giving Plan  
**\$100,000.00 (Qualified) - Opportunity** Laura C. Wilkerson - Prospect

Prospect manager:	Start date:	Plan stage:	Prospect address:
		Qualification	260 Woodcrest Dr
Primary manager:	Start date:		Athens, GA
Wilkerson, Mrs. Laura	4/21/2017		30606-2338
Catherine Ford 2008	Start date:		Phone number:
Secondary manager:			662-518-1408
			Email address:
			lcf29@uga.edu

Details Associated Revenue Naming Opportunities Campaigns Solicitors **Attributes** A.I.T. Scores

**Attributes (0)**  **Add** 

Category

**Add opportunity attribute**


Category:

Value:

Start date:


End date:

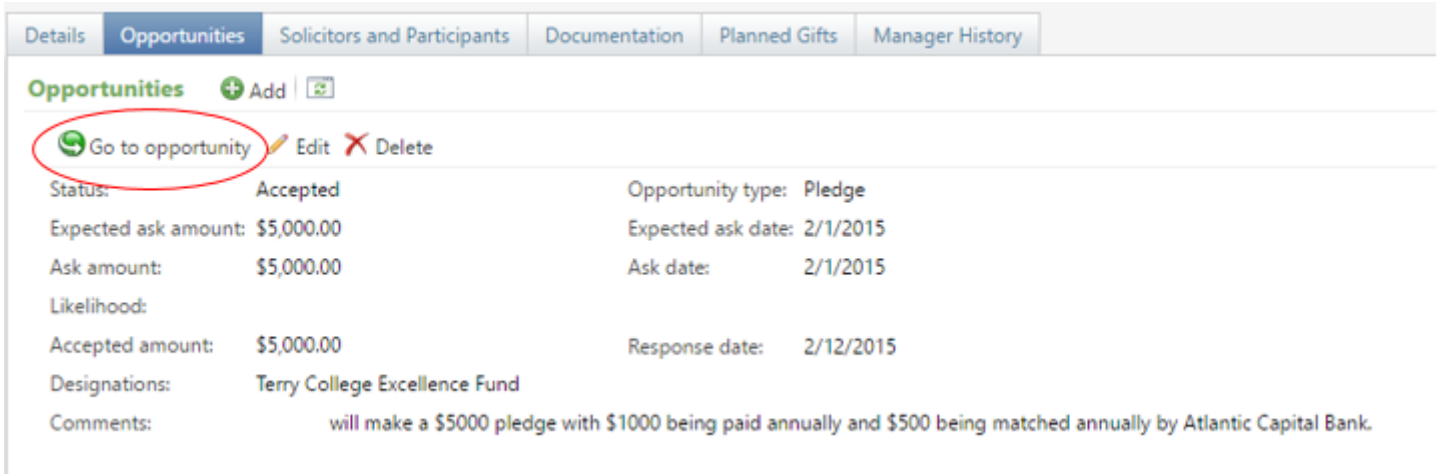
Comment:

 Help

## Prospect Management Policies and Procedures

### A.9.2 How to See if Revenue Has Been Associated to an Opportunity

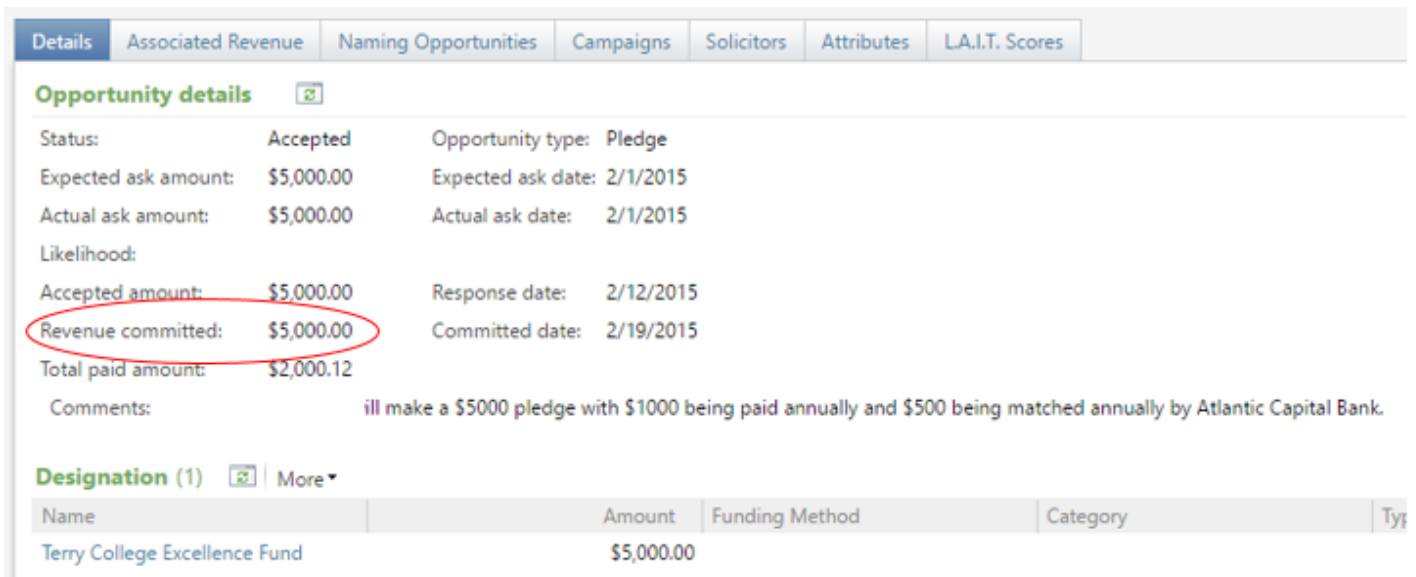
Within the plan, click on the “Opportunities” tab, locate the specific Opportunity you are interested in viewing, and click on the  Go to opportunity button.



The screenshot shows the 'Opportunities' tab selected. Below the tab, there is a section titled 'Opportunities' with a '+ Add' button and a 'Go to opportunity' button (circled in red). To the right of the 'Go to opportunity' button are 'Edit' and 'Delete' buttons. Below these buttons, the details of an opportunity are displayed:

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.



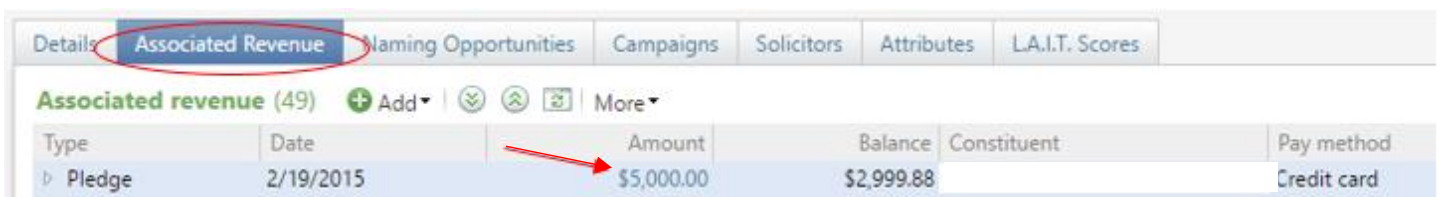
The screenshot shows the 'Opportunity details' page. The 'Associated Revenue' tab is selected. Below the tab, the details of the opportunity are displayed:

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

Below the details, there is a section titled 'Designation (1)' with a 'More' button. Below this, a table shows the designation details:

Name	Amount	Funding Method	Category	Type
Terry College Excellence Fund	\$5,000.00			

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



The screenshot shows the 'Associated Revenue' tab selected. Below the tab, there is a section titled 'Associated revenue (49)' with a '+ Add' button and a 'More' button. Below this, a table shows the associated revenue details:

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

## A.10 HOW TO FILL OUT A TRANSMITTAL FORM TO ENSURE THAT REVENUE IS ASSOCIATED WITH THE CORRECT PLAN AND OPPORTUNITY

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

Add Matching, Tribute, Recognition Information, or Special Instructions



Matching Gift Details ?

Tribute Type ? (in honor of, in memory of, etc.)

not a tribute

Tribute Information ?

Recognition Information ?

Special Instructions ?



Submit



## Prospect Management Policies and Procedures

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

Asterisks (\*) indicate required fields.

Amount  ?

Designation  ?

Revenue Type  ?

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

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

Opportunity

Back Continue

Logout | Clear Session | My Transactions | e Batches

Home | About Us | News | Give | Forms


Please choose...

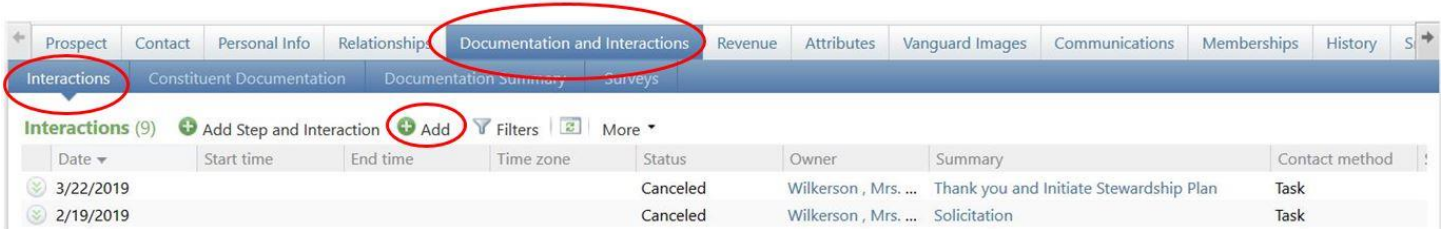
- Leadership Annual Gift Plan - TCOB - PWC Corporate Sponsorship - \$2,500.00 - 08/29/2017 - Terry College Professional Women's Conference Fund
- Leadership Annual Gift Plan - FACS - Leadership Annual Gift to GICH - \$20,000.00 - 12/23/2016 - Georgia Initiative for Community Housing Fund
- Campaign Principal Gift - CDFR - Campaign Principal Gift Plan - \$425,000.00 - 12/01/2016

Remember ☐


## A.11 HOW TO ADD INTERACTIONS

### A.11.1 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.



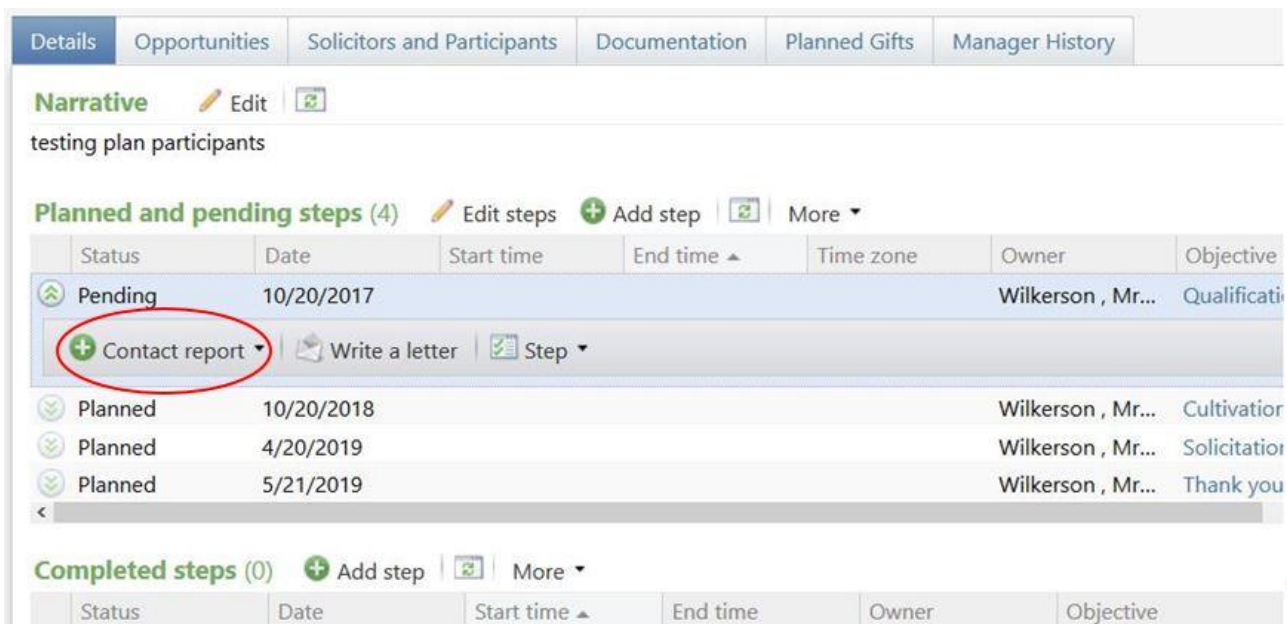
### A.11.2 Add Step and Interaction

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.



### A.11.3 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.



## Prospect Management Policies and Procedures

### A.11.4 Example of a Proper Meeting Entry

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

**File a contact report**

Objective:

Status:

Owner:

Stage:

Actual date:

Contact Method:

Actual start time:

Category:

Actual end time:

Subcategory:

**Additional solicitors**

**Participants**

**Comment:**

"On Tuesday, March 7th, 2017 I met with Sally and John Smith at the Blacksmith Shop in Macon, GA for dinner. Sally and John have two kids – their oldest son is a middle school history teacher and their daughter is a librarian. During our conversation, they mentioned that they currently have a granddaughter (their daughter's daughter) that is a senior in the Terry College of Business studying Economics and Accounting. We also discussed their plans to gift a rare and extensive collection of beanie babies to the College of Veterinary Medicine by the end of the calendar year. I told them that I would draw up the necessary paperwork and schedule a follow-up meeting for late April."

**Next step in prospect plan**

☒ Edit next step information

Objective:

Status:

Owner:

Expected date:

Actual date:

**Note:** If you are on the road and do not have time to compose a full narrative while you are traveling, follow this template to help you collect all the important required information:

Location:

Attendees:

Major Gift Inclination/Ability based on my assessment:

Relationship Info/Personal Details:

Summary of Meeting Content:

Next Steps:

## A.12 REFERRALS FROM ADVANCEMENT RESEARCH

### A.12.1 Receiving a Referral in GAIL

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

**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
3/17/2017	Holly C. Weimer	Christopher B. Patten	Christopher B. Patten	191322	Holly C. Weimer	Referral	Rejected	No
3/17/2017	Holly C. Weimer	Holly C. Weimer	Aaron Weimer	10670060		Referral to Director	Pending	No
3/19/2017	Holly C. Weimer	Holly C. Weimer	Aaron Weimer	10670060		Referral	Pending	No
4/23/2017	Holly C. Weimer	Laura A. Hix	David S. Jones	128366		Referral	Pending	No



## A.13 RESEARCH REQUESTS IN GAIL

### A.13.1 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: hweimer@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)** Add More  
 Status: All statuses Include canceled Request date: All dates Sites: All sites Apply Reset

Request ID	Due date	Status	Record type	No. prospec
------------	----------	--------	-------------	-------------

### A.13.2 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:  
 Prospect

Priority: [Dropdown]  
 Due date: 5/3/2017  
 Research type: [Dropdown]  
 Request reason: [Dropdown]  
 Requested by: Hix , Ms. Laura Anne Eastall (Laura)  
 Submitted by: Hix , Ms. Laura Anne Eastall (Laura)  
 Sites: [Dropdown]  
 Notes: [Text Area]

**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.**

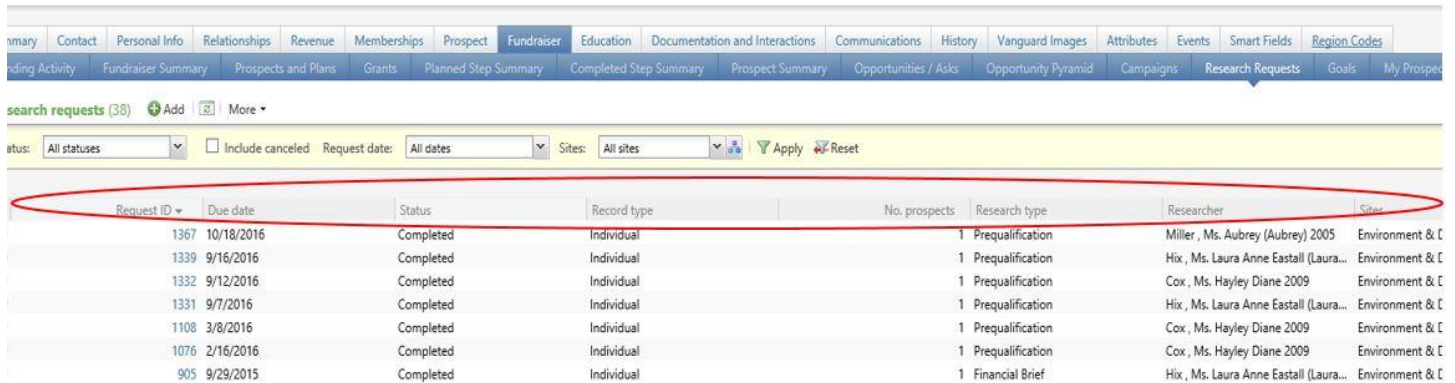
**If you would like to include additional information about the reason for or urgency of this request to the Advancement Research team, please include that information here.**

Save Cancel

## Prospect Management Policies and Procedures

### A.13.3 Checking on Your Research Request

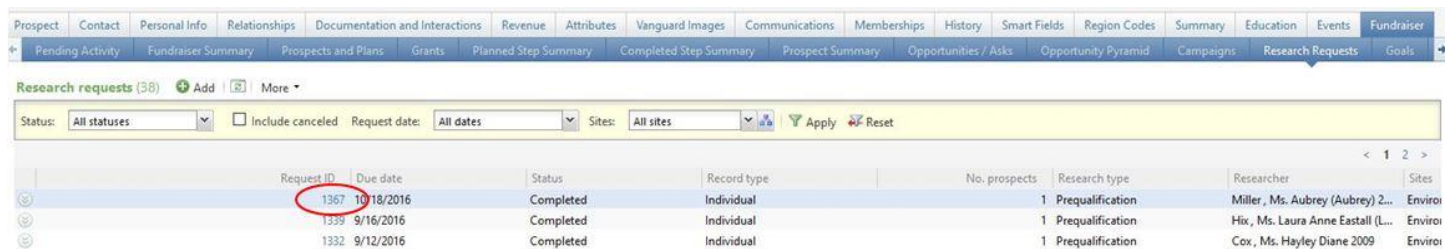
You will be able to view your requests on the “Research Requests” tab of your My Fundraiser Page. The information included will be the request ID# assigned to the request, due date, status (pending, in progress, completed), research type (prequalification, financial brief, bio, comprehensive, etc.) and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



Request ID	Due date	Status	Record type	No. prospects	Research type	Researcher	Sites
1367	10/18/2016	Completed	Individual	1	Prequalification	Miller, Ms. Aubrey (Aubrey) 2005	Environment & C
1339	9/16/2016	Completed	Individual	1	Prequalification	Hix, Ms. Laura Anne Eastall (Laura...	Environment & C
1332	9/12/2016	Completed	Individual	1	Prequalification	Cox, Ms. Hayley Diane 2009	Environment & C
1331	9/7/2016	Completed	Individual	1	Prequalification	Hix, Ms. Laura Anne Eastall (Laura...	Environment & C
1108	3/8/2016	Completed	Individual	1	Prequalification	Cox, Ms. Hayley Diane 2009	Environment & C
1076	2/16/2016	Completed	Individual	1	Prequalification	Cox, Ms. Hayley Diane 2009	Environment & C
905	9/29/2015	Completed	Individual	1	Financial Brief	Hix, Ms. Laura Anne Eastall (Laura...	Environment & C

### A.13.4 Retrieving Your Research Request

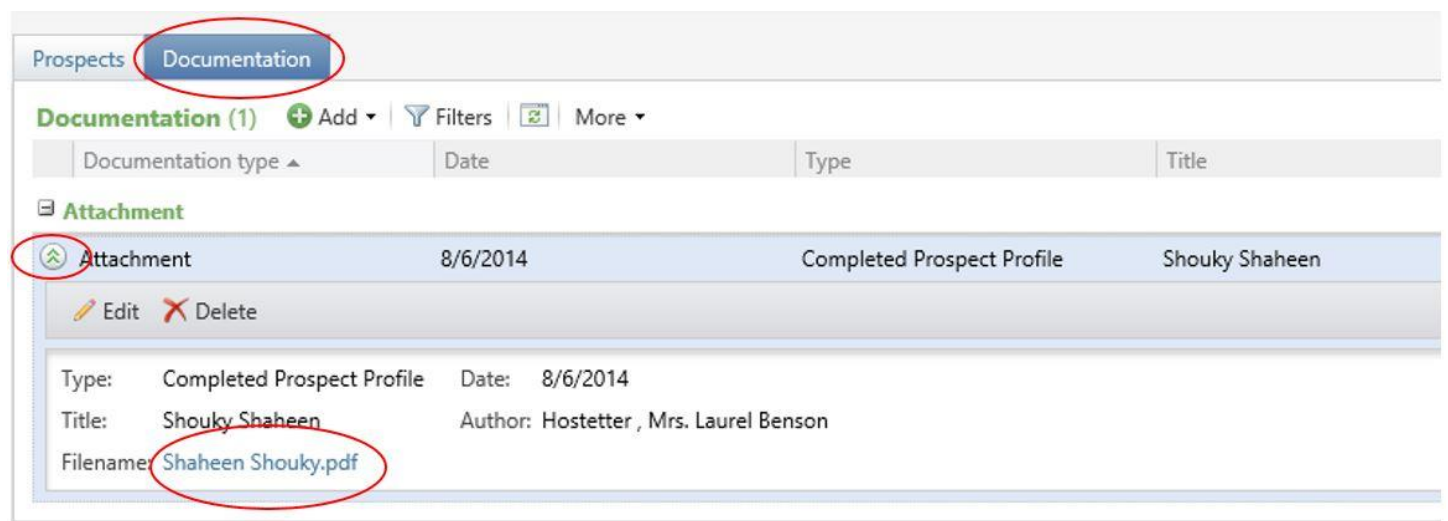
To view a completed Research Request, click on a blue Request ID within the “Research Requests” tab.



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

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.

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



Documentation type	Date	Type	Title
Attachment	8/6/2014	Completed Prospect Profile	Shouky Shaheen
Type: Completed Prospect Profile Date: 8/6/2014			
Title: Shouky Shaheen Author: Hostetter, Mrs. Laurel Benson			
Filename: Shaheen Shouky.pdf			

## A.14 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.

The screenshot shows the Prospect Management System interface. The top navigation bar includes tabs for Analysis, Administration, and Training and Support. The Analysis tab is selected, and the 'Prospect management reports' link is highlighted in the right-hand menu. The main content area shows various reports and information libraries. A red arrow points to the 'Prospect management reports' link in the right-hand menu.

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.

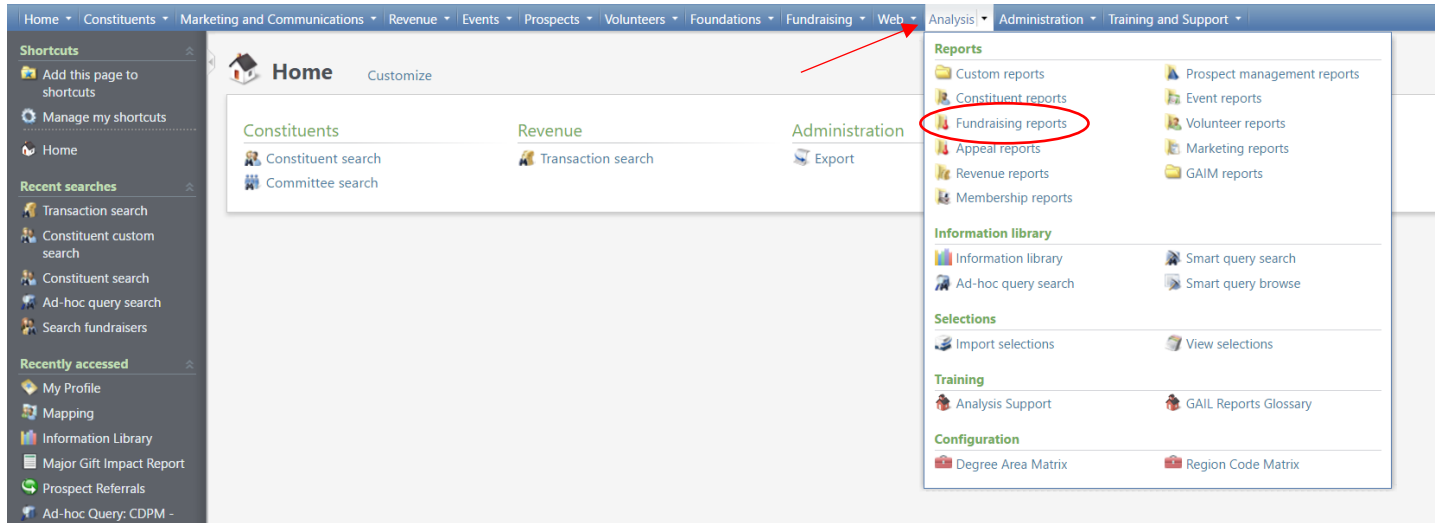
The screenshot shows the CDMG - Interactions report interface. The filters section includes Start Date (4/1/2017), End Date (4/30/2017), Enter the Fundraiser (Abbott, Ms. Jennifer W.), Enter a Contact Method (Initial Meeting, Return Meeting), Date field for date range (Date), and Sort By (Default Sort). The View Report button is highlighted. The report title is 'The University of Georgia Foundation Interactions for: Abbott, Ms. Jennifer W. For the dates: 4/1/2017 - 4/30/2017'. The table below shows the interaction data.

Lookup ID	Name	City/State	Date	Summary	Contact Method	Plan type	OwnerName	Interaction	Contact
249600	Brian D. Buck	Athens, Georgia	4/14/2017	Visit to discuss wording for scholarship	Return Meeting	Prospect plan	Jennifer W. Abbott	Yes	Yes

Comment: I met with Dr. Buck to 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. Dr. Buck 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.

## A.15 HOW TO VIEW MAJOR GIFT IMPACT REPORT

Under the “Analysis” tab, navigate to the “Fundraising reports” section. Under the “Custom reports” header, click on the “Major Gift Impact Report” link.



### A.15.1 Drilling Down in the Major Gift Impact Report

Find and click your name. The list is sorted by Major Gift Officer by last name and then by Annual Leadership Officers by last name. The drill down will show detail for Fulfilled Asks, Revenue from Prior Fiscal Year Asks, Other Revenue, GA Commitment Matches, GA Commitment Matches from Prior Fiscal Year Asks, Uncredited Revenue, and Uncredited GA Commitment Matches.

Major Gift Impact Report

1 of 3

Find | Next

**Current Fiscal Year  
Major Gift Impact Report  
2017 Fiscal Year-to-Date as of 4/21/2017**

Development Officer	FY 2017 Plans		Prior Year Asks Committed Revenue	No Plan Other Revenue	FY 2017 Total Revenue Committed	FY 2017 Other Meetings	FY 2017 Other Inter-actions	Last Month Meetings	Last Month Inter-actions	GA Commitment Scholarships		
	FY 2017 Committed Asks	FY 2017 Committed Revenue								CFY Ask GA Commitment Total	Prior Year Ask GA Commitment Total	Total including GA Commitment Matches
Jennifer Abbott	4	\$41,000										
Siara Abdulla	19	\$310,074	\$135									
Carlton Bain	9	\$180,582	\$100									
Sarah Baines	2	\$27,500										
Katharine Barrow	11	\$308,250										
<b>Evin Beck</b>	35	\$2,277,540	\$37									
Brod Bell	37	\$1,549,490	\$1,075									
Katrina Bowers	20	\$1,471,199	\$5,050									
Ansley Braxton	9	\$596,250	\$24									
Andrea Burruss	13	\$360,500										

**Development Officer Detail Report**

1 of 3

Find | Next

**Evin Beck**

Fulfilled Asks							
Prospect	Plan Name	Role	Ask Date	Ask Amount	Revenue Date	Revenue Amount	Gift Type
John O. Knox	ATHL - Magill Society	Primary Manager	4/5/2017	\$25,000	4/11/2017	\$25,000	Pledge
James O. Nalley	ATHL - Magill Society	Primary Manager	12/5/2016	\$25,000	3/6/2017	\$25,000	Pledge
Howard Bissell	ATHL - Magill Society	Primary Manager	2/7/2017	\$25,000	2/28/2017	\$25,000	Outright Gift
James D. Magnus	ATHL - Indoor Practice Facility	Primary Manager	2/17/2017	\$650,000	2/28/2017	\$650,000	Pledge
Kasey S. Carpenter	ATHL-MG	Secondary Manager	2/22/2017	\$100,000	2/23/2017	\$100,000	Pledge



## A.16 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.

The screenshot shows the 'Prospects and plans (188)' section with a yellow filter bar. The 'Filters' button is circled in red. Three dropdown menus are open, showing options for 'Opportunity status', 'Prospect plan type', and 'Plan stage'. The 'Apply' button is also circled in red.

- Opportunity status:** Any or none, No opportunity, Unqualified/Qualified/Response pending/Accepted, Unqualified/Qualified/Response pending, Qualified/Response pending, Unqualified, Qualified, Response pending, Accepted, Rejected, Canceled.
- Prospect plan type:** Campaign Principal Gift, Converted Prospect Plan, Historic Prospect Plan, Leadership Annual Gift Plan, Long-Term Stewardship, Major Giving Plan, Permanent Stewardship, Qualification, Referral, Stewardship.
- Plan stage:** Qualification, Cultivation, Solicitation, Stewardship, Permanent Stewardship.

## A.17 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&pagelId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=cd28a381-095d-4d4a-a016-1e4d25e0f3ab](https://crm.gail.uga.edu/bbappfx_gail/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pagelId=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&pagelId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=57e4929d-2a9b-4545-bd92-a5cdd5bc6228](https://crm.gail.uga.edu/bbappfx_gail/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pagelId=387f861b-6c03-486c-9ff5-9cc5bb7a5275&recordId=57e4929d-2a9b-4545-bd92-a5cdd5bc6228)

## Prospect Management Policies and Procedures