Policies and Procedures

Prospects & Proposals

# Proposal Records

A proposal helps you track major donation projects. The proposal record allows you to track information related to a specific ask in one place, as well as to see what other solicitations the constituent may be receiving. Once a gift is received in response to a proposal, it can be linked to the proposal record.

# Proposals are created for all specific asks, including specific individual/corporate solicitations.

* 1. Fill out every proposal record as completely as possible.
     1. **Name:** Fill out a name for the proposal that is descriptive of the purpose
     2. **Purpose:** This is the target interest of the Campaign proposal:
        1. Building
        2. Board and Committee Recruitment
        3. Bravo Legacy Luncheon Sponsorship
        4. Inaugural Bravo Legacy Luncheon Sponsorship 0
        5. Friends Society Renewal
        6. Donation
        7. Development Committee
        8. Resource Planning Group
        9. Board of Directors
     3. **Campaign:** use the campaign that best fits the proposal. See [Campaigns, Funds, and Appeals.](../5.%20Gift%20Records/POLICY%20-%20Campaign%20Fund%20Appeal%20Package-%20needs%20more%20work.docx)
     4. **Fund:** use the main fund that the proposal would fund. See [Campaigns, Funds, and Appeals.](../5.%20Gift%20Records/POLICY%20-%20Campaign%20Fund%20Appeal%20Package-%20needs%20more%20work.docx)
     5. **Solicitors:** Link to the key solicitors for the proposal.
        1. Only one solicitor should be included on each proposal for reporting reasons. Others involved in the process should be included on the relationships tab and in the notes.
     6. **Deadline:** Fill out a date if it is appropriate.
     7. **Contact:** For all gifts coming from an organization, foundation, or corporation, list the contact name for the proposal.
        1. The drop down provides a list of all relationships marked as ‘contact.’ If you do not see your contact’s name in the drop down, be sure to update the relationship tab on the constituent’s record.
     8. **Status:** Show what stage the proposal is in using the table below.
        1. **Identification / Qualification** – The process by which a (staff or volunteer) solicitor determines that the prospect has the interest and capacity to give to the Van Wezal Foundation. Usually this is achieved through an initial contact such as an email, a phone call, or a visit. Once the prospect is qualified then extensive research is conducted. Some preliminary research may be conducted prior to qualification as part of the identification process.
        2. **Research** - Taking the initiative to find new prospects or responding to a specific request to profile a specific individual, group of individuals, a business, or a foundation.
        3. **Strategy / Cultivation** – A strategic development move designed to engage a prospect toward a major gift.
        4. **Solicitation** – Proposal opened; gift discussion underway.

Result:

* + - 1. **Pending –** Prospect is considering the ask.
      2. **Rejected –** No further contact necessary at this time.  Prospect is not willing or interested in making a gift commitment.
      3. **Booked/Steward** – Substantive contact regarding an existing or planned gift; follow-up; thank yous.

## Once all actions relating to a proposal have been completed, mark the proposal as inactive using the checkbox on the bottom left.

# Procedure

* 1. <forthcoming>