

Closing a Proposal in EverTrue

Once the gift has been finalized and all necessary documentation has been received, you may mark the proposal Accepted. You must also close any proposal that has been Declined or Withdrawn. **Note: Gift payment does not need to have been received, but all necessary documentation must be in hand.**

To close a proposal, you will need to update:

- **Proposal Stage** (Accepted, Declined, or Withdrawn)
- **Active Indicator to “Inactive”** (unless it is a planned gift, in which case it remains active)
- **Funded Date:** Regardless of whether the proposal was Accepted, Withdrawn, or Declined, you must always enter a Date in this Field.
- **Funded Amount:** If the proposal was Accepted, enter the final amount, otherwise, leave this space blank.
- **Designation area(s) and amount(s):** adjust these as needed to reflect what the donor specifically funded
- **Program Stage:** if Accepted, update to Stewardship. If Declined or Withdrawn, pick an appropriate stage.

Edit Proposal

Status

Stage: Accepted

Active:

Original Ask: Jan 01, 2022 \$ 500,000

Current Ask: Dec 20, 2021 \$ 500,000

Expected: Jun 30, 2022 \$ 400,000

Funded: Jun 30, 2022 \$ 450,000

Confidence: 90%

Designations (max 5)

SIF: Bicentennial Scholars \$ 450,000

Select a designation to add...

Custom Fields

Program Stage: REQUIRED Stewardship

Closing a Proposal in EverTrue

Completed proposal:

The screenshot shows a proposal titled "Test Endowment Gift for Scholarships" in the "Individual" category. It lists a prospect, Michael Bass, and a solicitor, Charlotte Hennessy. The proposal details include an original ask of \$500,000 on Jan 01, 2022, a current ask of \$500,000 on Dec 20, 2021, an expected date of Jun 30, 2022 for \$400,000, and a funded date of Jun 30, 2022 for \$450,000. The proposal is designated as "SIF: Bicentennial Scholars" with a confidence level of 90% and is currently in the "Stewardship" program stage. The planned gift status is marked as "NO".

Category	Item	Date	Amount
Original	Original	Jan 01, 2022	\$500,000
	Ask	Dec 20, 2021	\$500,000
	Expected	Jun 30, 2022	\$400,000
Funded	Funded	Jun 30, 2022	\$450,000
	Designations	SIF: Bicentennial Scholars	\$450,000

Process Note:

A Planning proposal must have:

Original Ask Date **and** Amount
Expected Date **and** Amount

An Ask Made/Pending Response proposal must have, at least:

Current Ask Date **and** Amount
Expected Date **and** Amount

Accepted must have, at least:

Current Ask Date **and** Amount
Funded Date **and** Amount

Declined/Withdrawn must have, at least:

Current Ask Date **and** Amount
Funded Date

As always, please reach out to prospect-management@virginia.edu with any questions or for any assistance needed with Proposal Management.