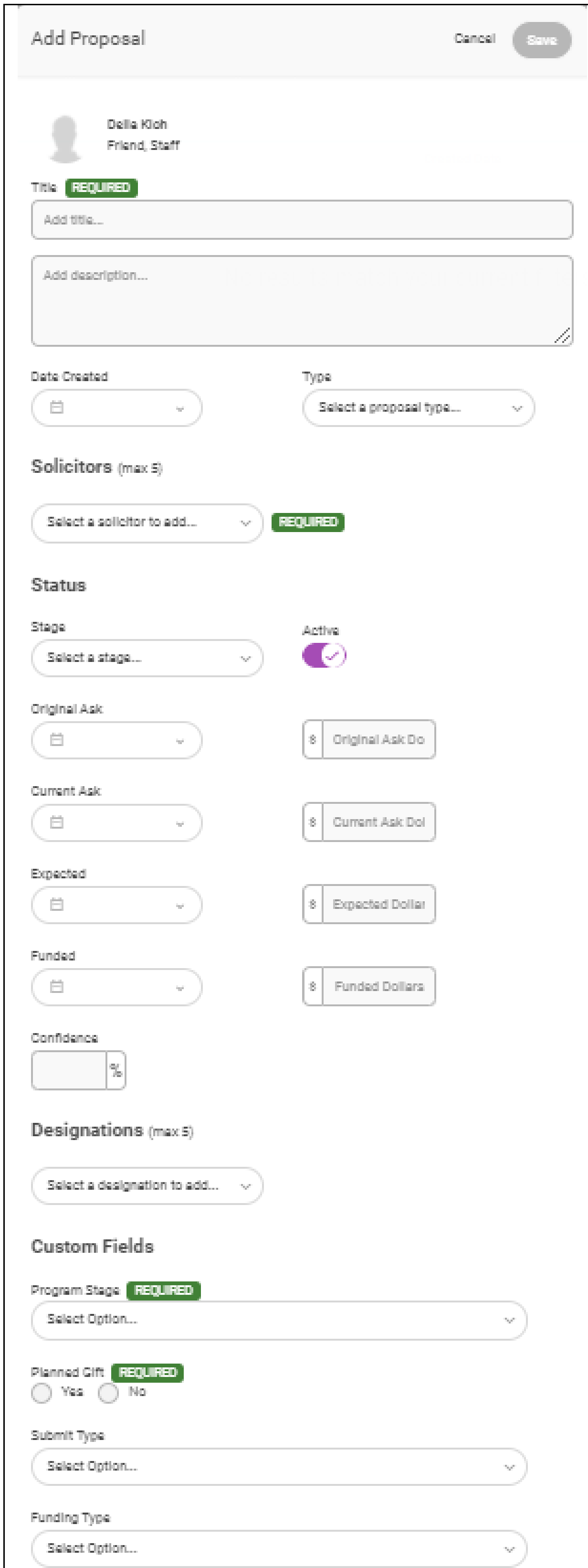
Managing Proposals in EverTrue (ET)

What: Below is the required information that should be managed for accurate proposal and pipeline tracking. As well, the program stage and the proposal status should be in alignment.
When: After a prospect has been qualified and there is a cultivation strategy for their gift, and general or specific area of interest.
Why: Document donor engagement and strategy, manage giving opportunities in your portfolio, track upcoming gifts in the pipeline.

Evertrue Proposals:



← For the **title**, it is recommended to have a consistent naming convention, e.g. School/Unit, Designation, Amount

← Although not required, the **description** is a free text space to describe the cultivation and ask strategy, gift details, or any other point of interest about the gift.

← **Date Created** = the date proposal is being originated in ET
← **Type** = Most frequently correlates to the type of account, individual, foundation, corporate. Planned Giving and PG gift types should be used only if they specifically apply to the giving vehicle.

← **Solicitors** = The development officer (DO) making the ask. If there are other DOs involved in proposal development, strategy and/or asks for multiple schools and units, they should be added here for the ask to be managed by the full team.

The **status** of the proposal captures the development of the proposal from early cultivation through gift acceptance. It tracks the movement of the gift over time and should be updated as the gift conversation unfolds.
← The **stage** reflects where the gift conversation is with the prospect. It should be updated along with the donor's engagement and interactions. Declined should be used when, either the donor has said no to the ask, or if the donor did not respond to a formal ask after a responsible and expected amount of time. Withdrawn should be used if the ask was not made by the DO.

← **Original Ask/Amount** = While the gift is in the *Planning stage*, these fields should be used to track the estimated date of the ask and estimated amount of the ask.
← **Current Ask/Amount** = When the gift is moved to the *Ask Made/Response Pending* stage, these fields should be used to track the gift amount and date that the prospect received the ask.
← **Expected Ask/Amount** = **These fields are required and used for pipeline forecasting**. They should reflect the DO's anticipated date and amount of gift at booking. The proposal is a living record of the gift conversation; therefore these fields *will* change as the conversation unfolds. The date should reflect when the DO anticipates the gift will be booked. The amount should reflect what the DO anticipates what the gift will be booked at, not necessarily the ask amount.
← **Funded** = When the proposal stage is moved to Accepted, these fields should be updated to reflect the accepted date and amount.
← **Confidence** = How confident the DO is that the prospect will make the gift.

← **Designations** = Indicates to which school or unit the gift will be directed. General school or unit designations can be used, if this is unknown during early cultivation.

← This field tracks the prospect engagement with the gift conversation from cultivation through stewardship and should be in alignment with the proposal stage above. **Program Stage** should be moved to *Preparing to Solicit* no more than 3 months before the ask.

← If this a planned gift, or a gift made through planned giving vehicles, check yes.

← These fields, **Submit Type** and **Funding Type** are not required but can be used to provide additional context for the gift.