

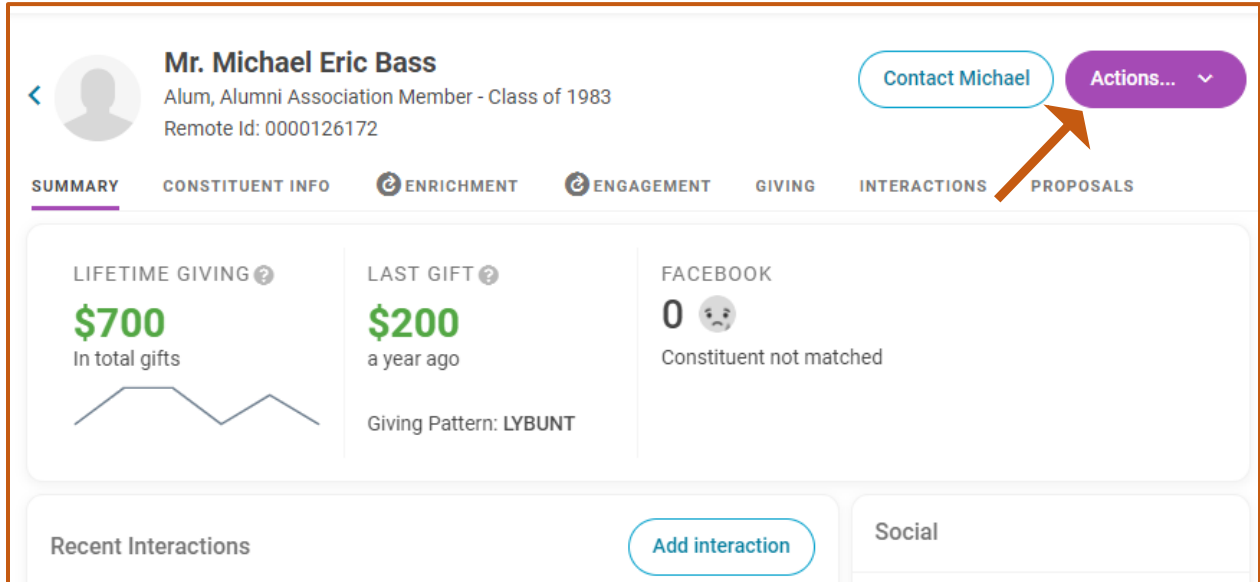
Creating and Updating a Proposal in EverTrue

Donor solicitations are documented through proposals, to track campaign pipeline revenue. For a solicitation to be accurately tracked, core data needs to be collected.

Planning a Solicitation

Enter a planning proposal for a Constituent when you have a sense of how much you will ask for, when you will ask for it (by FY quarter), and what the ask will be for.

Begin on the Constituent Profile for the individual you plan to solicit.



Mr. Michael Eric Bass
Alum, Alumni Association Member - Class of 1983
Remote Id: 0000126172

Contact Michael Actions...

SUMMARY CONSTITUENT INFO ENRICHMENT ENGAGEMENT GIVING INTERACTIONS PROPOSALS

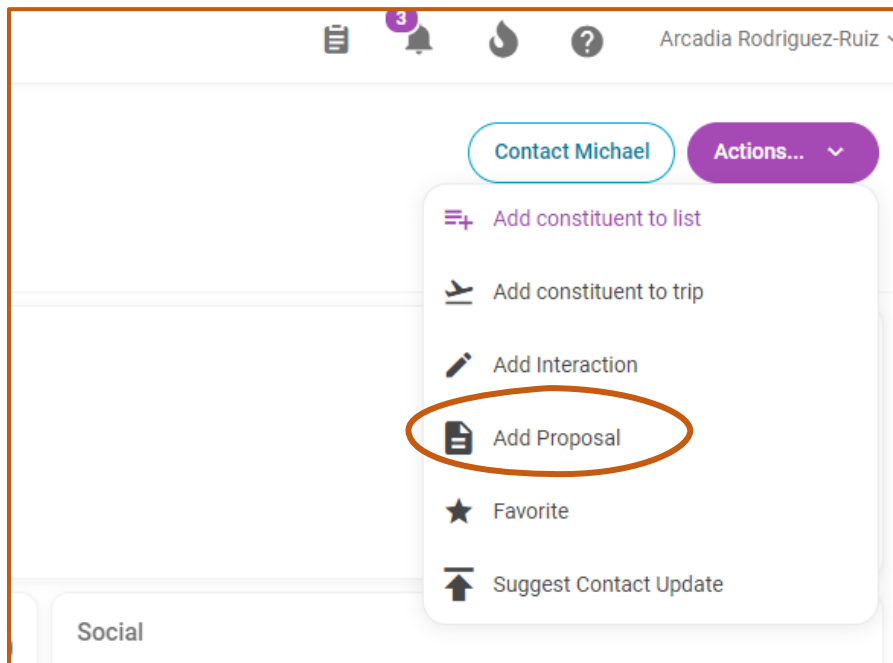
LIFETIME GIVING **\$700**
In total gifts

LAST GIFT **\$200**
a year ago
Giving Pattern: LYBUNT

FACEBOOK
0
Constituent not matched

Recent Interactions Add interaction Social

From there, click the purple “Actions...” button in the upper right corner. This will open a drop-down menu. Select, “Add Proposal”. This will open the EverTrue proposal form.



Contact Michael Actions...

- Add constituent to list
- Add constituent to trip
- Add Interaction
- Add Proposal
- Favorite
- Suggest Contact Update

Social

Creating and Updating a Proposal in EverTrue

The following information **must be included** in all planning proposals:

- **Title** (Make this as brief, but descriptive as possible)
- **Type** (Individual, Foundation, etc.)
- **Solicitors** (up to 5)
- **Stage** (Planning, Ask Made, etc.)
- **Original Date and Amount:** how much you think you will ask for and when you think you will ask. You **must fill out both the amount and the date** for the entry to count. Use your best judgement.
- **Expected Date and Amount:** how much you believe they will give and when the ask will close. **Both fields must be filled out for the proposal to count towards pipeline.**
- **Confidence:** how confident you are in the Expected Date and Amount (1% - 100%)
- **Designation:** the area(s) and amount(s) the gift will support. Use a general program area, if you are uncertain. You may have up to five areas
- **Program Stage** (Cultivation, Preparing to Solicit, etc.)
- **Planned Gift Indicator** (Y/N)

Once this information has been entered, click "Save".

Edit Proposal Cancel Save

Michael Bass
Alum, Alumni Association Member - Class of 1983

Title REQUIRED
Endowment Gift for Scholarships

To be given over 5 years

Date Created: Dec 13, 2021

Type
Individual

Solicitors (max 5)
Charlotte Hennessy
Primary

Select a solicitor to add...

Status
Stage: Active

Creating and Updating a Proposal in EverTrue

Proposal Form Cont.

Edit Proposal Cancel Save

Stage: Planning Active

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

Current Ask: Current Ask Dol

Expected: May 31, 2022 \$ 500,000

Funded: Funded Dollars

Confidence: 75%

Designations (max 5): SIF: Bicentennial Scholars \$ 500,000

Select a designation to add...

Custom Fields

Program Stage **REQUIRED**: Preparing to Solicit

Planned Gift **REQUIRED**: Yes No

Submit Type: Select Option...

Funding Type: Select Option...

Creating and Updating a Proposal in EverTrue

Your proposal will now appear on the Proposal Tab of the Constituent Profile.

Mr. Michael Eric Bass
Alum, Alumni Association Member - Class of 1983
Remote Id: 0000126172

Contact Michael Actions...

SUMMARY CONSTITUENT INFO ENRICHMENT ENGAGEMENT GIVING INTERACTIONS **PROPOSALS**

Any Solicitor Active All Stages

2 Proposals Created Date

Proposal	Prospect	Stage	Created Date	Time in Stage	Solicitors
★ Test Endowment Gift for Scholarships	Michael Bass	Planning	Dec 13, 2021	7 minutes	Charlotte Hennessy

Updating the Proposal

To review or update your proposal, select your proposal on the Proposal Tab. This will take you to the full details of your proposals. To update your proposal, click the “Edit” button in the upper right corner. This will take you back to the proposal form.

Test Endowment Gift for Scholarships
Individual

Edit Delete

Prospects

Michael Bass
Alum, Alumni Association Member - Class of 1983

To be given over 5 years

Solicitors

Charlotte Hennessy

Import ID
N/A

Last Update
Dec 13, 2021 (via EverTrue)

Planning

time in stage: 9 minutes

Activity
No Associated Interaction

Original	Amount
Jan 01, 2022	\$500,000
Ask	-
Expected	-
May 31, 2022	\$500,000
Funded	-

Designations

Designation	Amount
SIF: Bicentennial Scholars	\$500,000

Confidence
75%

Program Stage
Preparing to Solicit

Planned Gift
X NO

Last Update: 2/9/2022

Creating and Updating a Proposal in EverTrue

Once the ask has been made, you will need to include the following information on your proposal

Update:

- **Proposal Stage** to “Ask Made/Response Pending”
- **Current Ask Date and Amount** to reflect when the ask was actually made
- Expected Ask Date and Amount (as needed)
- Confidence score (as needed)
- Designation area(s) and amount(s) (as needed)
- **Update Program Stage** to “Solicitation Open”

Save your updates:

Edit Proposal Cancel Save

Status

Stage: Ask Made/Response Pending Active

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

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

Expected: Jun 30, 2022 \$ 400,000

Funded: \$ Funded Dollars

Confidence: 90%

Designations (max 5)

SIF: Bicentennial Scholars \$ 500,000

Select a designation to add...

Custom Fields

Program Stage **REQUIRED**: Preparing to Solicit

Last Update: 2/9/2022