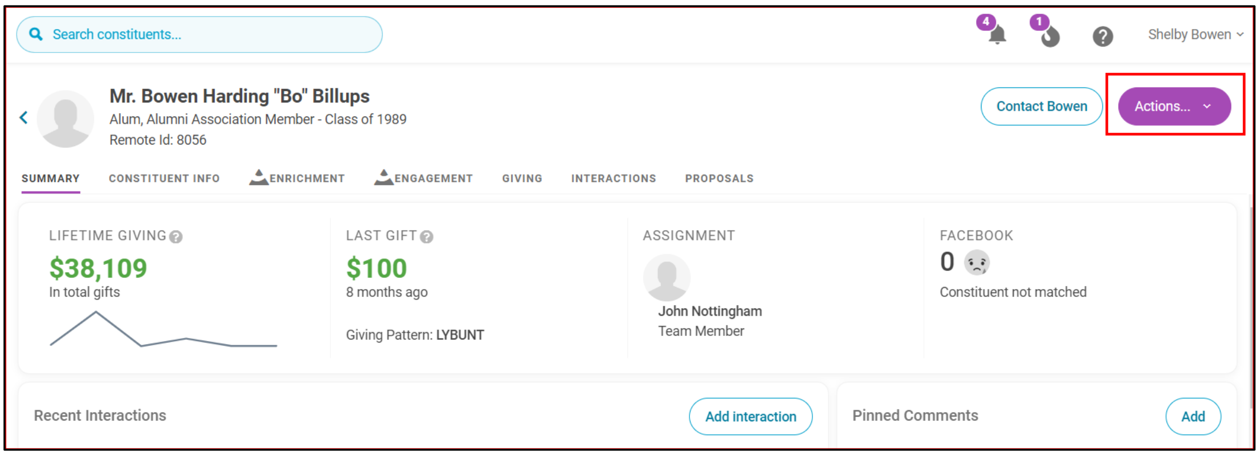
Creating and Updating a Proposal in EverTrue

Donor solicitations are documented through proposals to track development officer performance. For a solicitation to be accurately tracked core data needs to be collected.

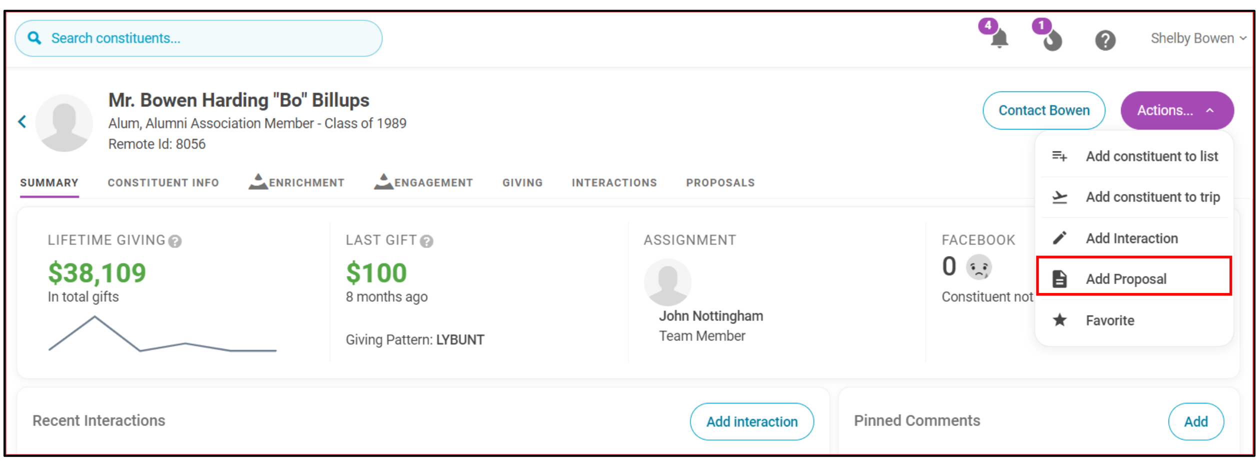
Planning a Solicitation

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 where the funds will be designated.

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



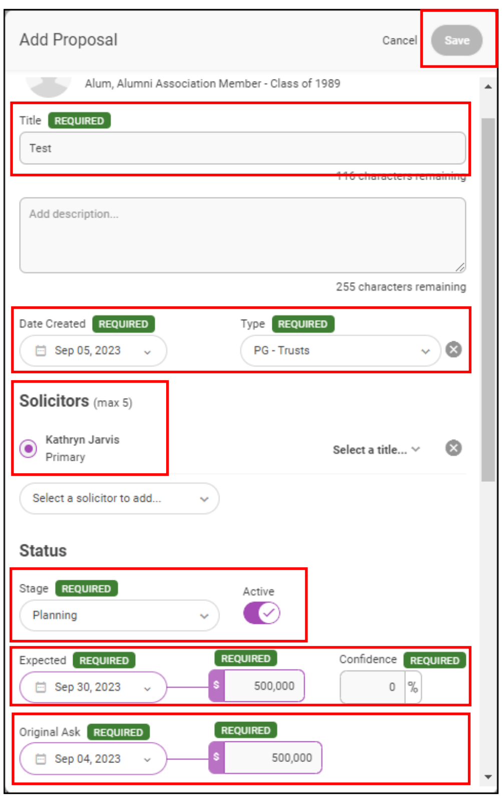
Select the purple **Actions** button in the upper right corner to open the drop-down menu. Select **Add Proposal** to open the EverTrue proposal form.

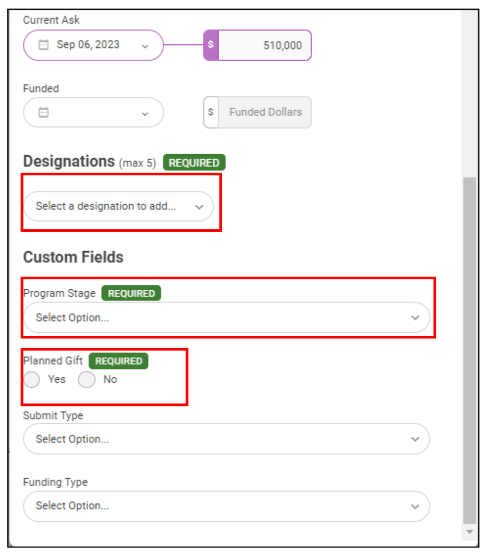


Proposal Required Information

The following information is required for all planning proposals:

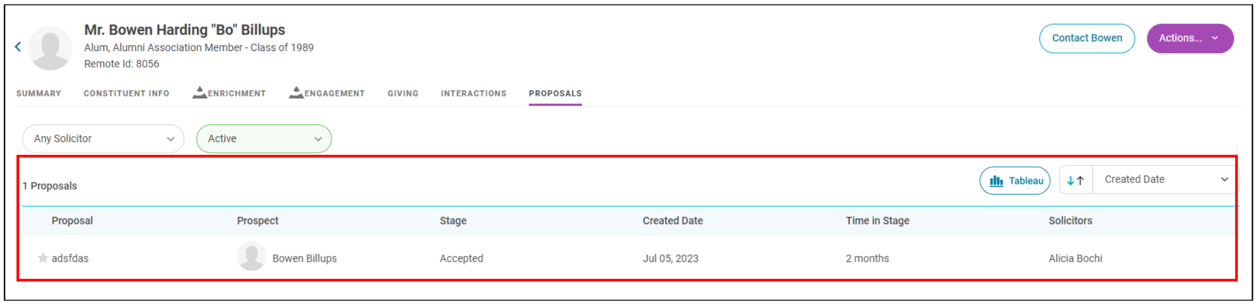
- **Title** (Make this brief, but as descriptive as possible)
- **Date Created**
- **Type** (Individual, Foundation, etc.)
- **Solicitors** (maximum of 5 solicitors)
- **Stage** (Planning, Ask Made, etc.)
- **Expected Date and Amount:** How much you believe they will give and when the ask will close. **Both fields must be entered to submit the proposal**.
- **Confidence:** How confident you are in the Expected Date and Amount (1% - 100%)
- **Original Ask Date and Amount:** How much you think you will ask for and when you think you will ask. You **must enter both the amount and the date** to submit the proposal.
- **Designations:** The area(s) and amount(s) the gift will support. Use a general program area if you are uncertain about the designation. You may select up to 5 designation areas.
- **Program Stage** (Cultivation, Preparing to Solicit, etc.)
- **Planned Gift Indicator** (Y/N) Once all required information has been entered, select **Save**.
- ***Note: A strategy note should accompany all proposals.***





Viewing and Editing Proposals

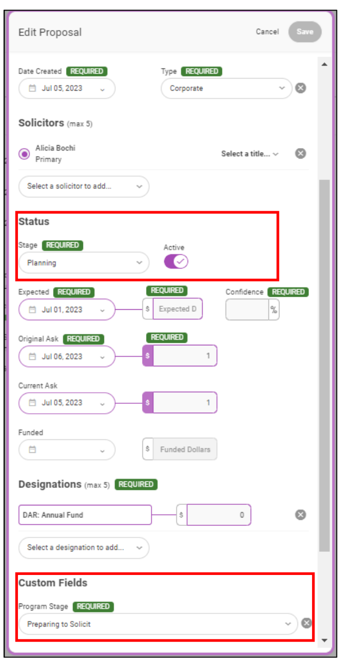
Your proposal will appear on the Proposal Tab of the Constituent Profile.



To edit an existing proposal, select the **Proposal Tab** of the **Constituent Profile**. Select the **proposal** you wish to edit. Once the proposal window has opened select the **Edit** button in the upper right corner to open the editing window

Updating Proposal Stages

To update proposal stages, you will need to enter information in the fields marked **Required** for both **the Status** Stage and **the Custom Fields** Program Stage. Entries for Status Stage must correlate to entries for Custom Fields Stage as illustrated in the **Proposal Stage Correlation Table** below. **Note: You will need to move the prospect in your Portfolio to reflect changes.*



Proposal Stage Correlation Table

If Proposal STATUS is…	Set CUSTOM FIELD Stage to…
Planning	Preparing to Solicit
Ask Made/Response Pending	Solicitation Open *(update 48 hours prior to ask)*
Accepted	Stewardship
Declined	Cultivation
Withdrawn	Cultivation

**Note: In the initial phases of a proposal, the Expected Date and Expected Dollar Amount may be the same as the Original Ask Date and Amount.*

Example Proposal Update

- **Proposal Stage >** “Ask Made/Response Pending”
- **Current Ask Date and Amount >** 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 >** “Solicitation Open”