

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.

The screenshot shows the EverTrue interface for a constituent profile. At the top, there is a search bar and a user profile for Shelby Bowen. The main header identifies the constituent as Mr. Bowen Harding "Bo" Billups, an Alum and Alumni Association Member from the Class of 1989. Below the header are several tabs: SUMMARY, CONSTITUENT INFO, ENRICHMENT, ENGAGEMENT, GIVING, INTERACTIONS, and PROPOSALS. The SUMMARY tab is active, displaying key metrics: LIFETIME GIVING of \$38,109, LAST GIFT of \$100 (8 months ago), and ASSIGNMENT to John Nottingham, a Team Member. A red box highlights the "Actions..." button in the top right corner of the profile card.

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.

This screenshot shows the same constituent profile as the previous one, but with the "Actions..." button open. The drop-down menu contains several options: "Add constituent to list", "Add constituent to trip", "Add Interaction", "Add Proposal", and "Favorite". The "Add Proposal" option is highlighted with a red box, indicating the next step in the process.

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.***

Add Proposal Cancel Save

Alum, Alumni Association Member - Class of 1989

Title **REQUIRED**
Test
116 characters remaining

Add description...
255 characters remaining

Date Created **REQUIRED** **Type** **REQUIRED**
Sep 05, 2023 PG - Trusts

Solicitors (max 5)
Kathryn Jarvis Primary
Select a solicitor to add...

Status
Stage **REQUIRED** Active
Planning

Expected **REQUIRED** **REQUIRED** **Confidence** **REQUIRED**
Sep 30, 2023 \$ 500,000 0 %

Original Ask **REQUIRED** **REQUIRED**
Sep 04, 2023 \$ 500,000

Current Ask

Sep 06, 2023 \$ 510,000

Funded
\$ Funded Dollars

Designations (max 5) **REQUIRED**
Select a designation to add...

Custom Fields
Program Stage **REQUIRED**
Select Option...

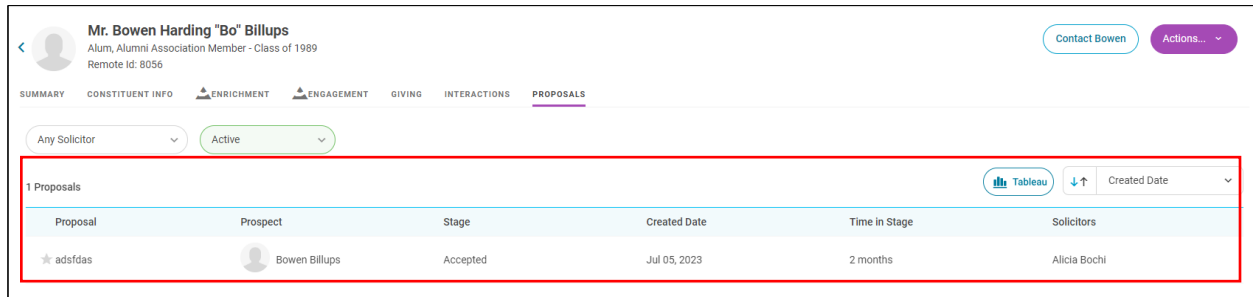
Planned Gift **REQUIRED**
 Yes No

Submit Type
Select Option...

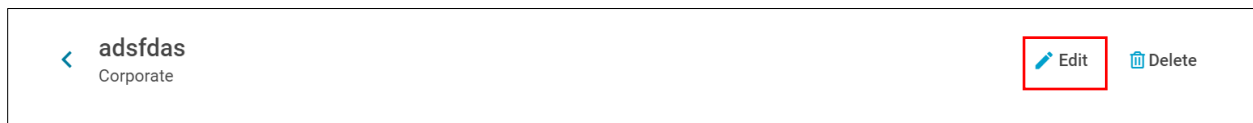
Funding Type
Select Option...

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 <i>(update 48 hours prior to ask)</i> |
| 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”