University of Alaska
& University of Alaska Foundation

Prospect Management and Tracking System
Policies and Procedures

I. Introduction and Overview

A. Background

Considering the commitment to increasing fundraising results at the University of Alaska, it has become apparent that certain policies and guidelines are needed to coordinate the solicitation of major gift prospects. As a step towards that end, the University of Alaska Foundation will prepare Prospect Management Policies and Procedures as stipulated in University Regulation R05.14.030.

The procedures outlined have been prepared as a reaffirmation of generally observed courtesies of collegial conduct, and as an explicit statement of new coordinating guidelines which the MAU's intensified fundraising will require.

Management of major gift prospects is necessary to achieve campus fundraising goals. Through an orderly program of prospect identification, cultivation, solicitation and stewardship, major gift activity is both encouraged and increased. Prospect management assists in the success efforts by coordinating approaches to prospects, with the ultimate benefit of maximizing total contributions to the University of Alaska.

B. Definitions

The statewide Prospect Management and Tracking System (PMATS) concerns cultivation and solicitation of major gift prospects (if in doubt of what the size of the expected gift will be, default to PMATS protocols). *Major gift prospects are defined as those individuals, corporations and foundations targeted for: 1) asks of gifts of $25,000 or more in the form of cash or securities; 2) all deferred gift prospects; 3) all real estate gift prospects and 4) gifts of equipment valued in excess of $25,000.*

C. Scope of Policy

All schools, colleges, departments and programs affiliated with the University of Alaska, including the UA Foundation, are subject to PMATS policy and the procedures outlined below for all private fundraising activities.

D. Authority

These procedures, designed to carry out the campus PMATS Policy, recognize the authority of the University of Alaska president through BOR Policy P05.14 and University Regulation R05.14.

The University of Alaska Foundation Prospect Research and Management Director is responsible for implementing these procedures.

II. PROSPECT MANAGEMENT

A. Purpose

Management of major prospects is necessary to achieve campus fundraising goals. Through an orderly program of prospect identification, cultivation, and solicitation, major gift activity is both encouraged and increased. Prospect management assists in the success of solicitation efforts by coordinating approaches to prospects, with the ultimate benefit of maximizing total contributions to the University of Alaska.

B. Prospect Management and Tracking System

1. Purpose

The purpose of PMATS is twofold:

1) To provide a mechanism for coordinating approaches to major gift prospects and

2) To ensure that all participants have up-to-date and accurate information on interactions with major prospects, whether individuals, corporations or foundations

2. Distribution of Prospect List

The UA Foundation will provide all fundraising units with a summary portfolio of names from PMATS. This portfolio will be created from all MAU-based development officers who are charged with the task of raising major gifts in their Prospect Manager roles. Updated portfolios will be distributed on a monthly basis and will contain names of all prospects currently being tracked on the system. *Information contained on portfolios is highly confidential and is intended solely for use by development officers, deans and department heads.* Portfolios may not be copied or distributed except as authorized by the Prospect Research and Management Director or the chief development officer at each campus.

C. Prospect Manager Responsibilities

Prospect Managers are responsible for the following actions to ensure that PMATS is of maximum usefulness to the University of Alaska effort:

- Review the portfolio for accuracy and currency of prospect/unit relationships;
- Review the portfolio for accuracy and currency of prospect information, i.e., spelling, ZIP;
- Request clearance for cultivation and solicitation of specific prospects (procedures follow);
- Develop a documented strategy for each prospect in the Raiser's Edge database;
- Track each prospect's relationship with the organization in the Raiser's Edge database;
- Plan contacts or moves for each prospect and note in the Raiser's Edge database;
- Coordinate Moves Management and note in the Raiser's Edge database
- Coordinate and prepare natural partners and primary players;
- Execute the plan. In other words, see that the contacts or moves are made;
- Reconfigure the strategy as development activities progress and refine the plan accordingly;
- Finally, coordinate the refined plan and execute the newly formulated moves;

III. CULTIVATION/SOLICITATION OF PROSPECTS

A. Definition

Cultivation describes actions that nurture a relationship between the institution and a prospect – essentially all good-will efforts made with the purpose of increasing that prospect's knowledge of and ties to the campus. Cultivation activities include invitation to special events, requests to serve on boards or other volunteer organizations, correspondence, phone calls, visits and other contact between the campus and its representatives and the prospect.

B. Request for Clearance

Schools, colleges, departments or programs whose ultimate goal is a major gift must obtain clearance for each prospect they propose to cultivate/solicit. Cultivation/solicitation efforts for gift requests of less than $25,000 do not require clearance, *with the exception of those individuals, corporations and foundations assigned to a Prospect Manager.* If a prospect is assigned, professional courtesy and ethical obligations must be recognized and the prospect manager must be consulted prior to any communication or solicitation.

These procedures recognize that, at times, opportunities for cultivation/solicitation may present themselves in the course of other unplanned development activity. Such contacts as are consistent with campus goals and priorities are appropriate and the staff member involved should notify the Prospect Manager as soon as possible after the occasion and file a documented contact report.

C. Factors in Clearance for Cultivation/Solicitation

The goal of cultivation/solicitation clearance is to match prospects with university programs and projects that have a reasonable probability of success in major gift solicitation. Contact assignment is based on a variety of factors, which are considered in evaluating cultivational clearance request and are outlined below:

Individuals

- Will of the donor/prospect
- MAU affinity
- Department or degree of study
- Donor history
- Campus Volunteer activity
- Personal interests and/or relationships
- Defined campus priorities

Corporations and Foundations

- Will of the donor/prospect
- Similarity between MAU activities and programmatic interests of prospect
- Corporation/foundation's giving criteria and guidelines
- Ties between prospect and MAU (faculty consultants to industry, corporate members of campus advisory boards, employees who are graduates of the MAU, etc.)
- Donor history
- Defined campus priorities

D. Procedures

Development officers who wish to request clearance to qualify and cultivate specific prospects as Discovery Solicitor or Prospect Manager should first request clearance and assignment from the UA Foundation's Prospect Research and Management Director. Clearance must be requested PRIOR to the commencement of discovery/cultivation. The Prospect Research and Management Director will report back to the DO within five working days on the status of the request.

E. Discovery Solicitor and Prospect Manager

Definition and Role
Prospects are assigned as Discovery Solicitors or Prospect Managers by the Prospect Research and Management Director in consultation with any relevant parties. See Appendix "A Primer for Moves Management" for definitions

F. Status

All prospects on PMATS will be tracked by status to allow Prospect Managers to quickly determine the prospect's relationship with the University of Alaska. The status is defined as the stage the prospect is at in relation to the timeline of the anticipated ask. Discovery Solicitors and Prospect Managers are responsible for continually reviewing and modifying the status.

It is imperative that major gift prospects are actively moved toward a gift. The status of a prospect should change regularly reflecting ongoing cultivation/solicitation. Prospect assignments will be evaluated on a regular basis. Upon approval of request for Discover Solicitor status, a Discovery Solicitor will have two months to make a qualification visit. Upon approval for Prospect Manager status, the PM will have three months to make initial cultivational contact and document a strategy. The PM will have six months following initial cultivational contact to document a follow-up contact report(s) detailing the progress towards a gift. If no follow-up contact report is posted, the PM must present the Prospect Research and Management Director with justification for continued PM status or the prospect may be re-assigned. All prospects assigned to Prospect Managers should have at least one contact report in any six month period, or the prospect may be re-assigned.

Status Codes and Their Meanings

0 = not a major gift prospect
This code signifies that the prospect is highly unlikely to ever make a single gift of $10,000 or more to the UA. Prospects who are rated A0 must have an accompanying contact report on the system as to why the prospect was disqualified, or have a documented analysis by the Prospect Research and Management Director. Prospect lists will exclude A0 prospects. The common scenario for prospects coded "0" is that they may remain in the "0" category forever. Due to changing circumstances; however, it may be determined later that not only does the prospect have the interest but also the capacity to make a major gift to UA. In that case, a code of "2" or higher will be applied.

Prospects will be coded with the name of the person who disqualified the prospect. **A contact report explaining the disqualification must be entered on the system as an Action record or as Prospect Research analysis Note.**

<u>1 = Prospect Identified</u>
Indicates that the constituent has been identified as a prospect either via personal contact or research but has not yet been assessed (qualified) to determine both interest in the university and philanthropic potential. Prospects with a status code of "1" *generally* are unmet alumni or friends who have been identified but not yet qualified through significant staff contact.

a. *Discovery visits* occur from this group of prospects. Following the visit, **assignment** of the prospect can be retained by the development officer who made the discovery call, OR can be transferred to another officer as appropriate, OR can be placed in the "unclaimed" pool (identified by the coding NA/Erne). A contact report must be entered by the qualifying development officer, and said officer must notify the systems administrator of proposed changes.

<u>2 = Prospect Qualified</u>
Indicates that a UA staff person has confirmed the constituent's interest in UA and capacity to make a gift. (Typically, this determination occurs as the result of a discovery visit.) At this point, the development officer must update the status. Coding will change over the cultivation/solicitation cycle.

<u>3 = Cultivation</u>
After a prospect has been qualified, the next contact should be for the purpose of cultivating him/her for a gift.

Cultivation is a time of relationship-building and of educating/updating the prospect about the university. During this time, formal strategies are developed and discussed at prospect management meetings. Field research also occurs, which may involve volunteers, friends, faculty/staff, etc. Personal contact is arranged; the purpose of the visit(s) is to establish relationships with key UA leaders and volunteers.

Development officer (s) must communicate to the Prospect Research and Management Director when updating the status to level "3." Additionally, contact should be made at least quarterly.

<u>4 = Intense Cultivation</u>
This is the most active and focused phase of cultivation. This occurs when the development officer has "bridged" the relationship-building phase to the gift cultivation phase. Contacts now include a focused discussion of the university's or school's needs and the impact of giving. Additional research, to help target an ask amount, may be requested.

At this point, personal contact is occurring frequently (monthly). Volunteers may have been identified or are being recruited for assistance in soliciting the prospect. A project(s) has been identified and solicitation is imminent. **Both frequent contact *and* an imminent solicitation schedule (within 6 months) must be in place before upgrading the prospect to level "4."** When an upgrade is requested, the development officer should provide an estimated ask amount (total and per project), the date by which the ask will be made, and the project(s) for which support will be requested. A documented proposal must be inserted into the constituent record no later than this stage.

Development officer (s) must communicate to the Prospect Research and Management Director when updating the status to level "4." Additionally, contact should be made at least quarterly.

5 = Solicited
This code indicates that a solicitation has been made. The ask may have been made orally (a document summary must still be inserted into the constituent record) or may have included a written proposal. In either case, the prospect has been asked specifically to make a gift.

The development officer must confirm in the constituent record the ask amount (total and per project), the date the ask was made, the date the solicitation is expected to close, and the project(s) for which support was requested.

6 = Temporary Stewardship
Used only for a constituent who has just made a major gift to the university and who is not expected to be solicited for another major gift soon. The status code may remain a "6" until the donor has completed a long-term pledge.

7 = Permanent Stewardship
This code is reserved for prospects/donors who have made their ultimate gift to the UA Foundation and it is considered highly unlikely that any additional major gifts will be solicited. Prospects in this category are generally planned giving donors. While contact will continue for stewardship reasons, these constituents are not in active cultivation for future commitments.

G. Exceptions

If a major gift prospect who is on PMATS approaches any development staff (not the designated Prospect Manager) with the intent of making a major gift, the staff member involved should notify the assigned Prospect Manager and Prospect Research and Management Director at once and file a documented Contact Report. The Prospect Research and Management Director will instruct other solicitors engaged in cultivation of the prospect to defer further activity until all concerned parties can meet to discuss the donor's wishes and campuses' strategies.

H. Multiple Affiliations and Conflict Resolution

Where multiple MAUs have a significant affiliation with the prospect, all affected units will be advised by the Foundation Prospect Research and Management Director if solicitation approval has been requested by one of the Development Officers. If any officer objects to a proposed solicitation by another officer, the affected parties will contact the Foundation Prospect Research and Management Director to seek resolution.

I. Denial of Clearance

Requests for solicitation clearance may be denied in cases where the request clearly is not suitable for the prospect, where the prospect has been cleared for another unit, or where the request is outside institutional priorities. In all cases, reasons for denial will be fully explained. If an officer seeking clearance has been denied but still feels that a case can be made for an approach, the clearance decision may be reviewed. Review of decisions should be based on specific written information submitted to prospect management director.

J. Contact Reports

All Discovery Solicitors and Prospect Managers will provide a documented summary in the Raiser's Edge database as an Action record of the important facts garnered through any encounter (planned or unplanned) with a prospect in which the encounter significantly advances the university's knowledge of the prospect, or the relationship between the university and the prospect. Particular attention will be paid to information about capacity, affiliation, interests, and timing asking for a gift. The Contact Report should also include any follow-up actions to be taken furthering knowledge of the prospect or continuing to advance the relationship. The existence of the Contact Report in RE shall be copied to any staff deemed to have relevancy to the information (e.g. the campus senior development officer, the UA Foundation president, the Corporation and Foundations Relations Manager, the Prospect Research and Management Director, the Campus chief executive officer, deans, directors, etc.).

IV. DONOR RELATIONS AND RE-SOLICITATION

A. Purpose

After a successful major solicitation has taken place Prospect Managers shall continue to work with donors for the purpose of donor relations and stewardship. Further solicitation may not be attempted unless clearance is once again obtained. Major donors are thus shielded from over-solicitation and are on file for donor appreciation and stewardship activities.

B. Re-solicitation

If further solicitation is anticipated, either by the beneficiary unit or by another unit, clearance must be obtained through regular procedures. In addition to the factors outlined in Section IV, approval to re-solicit will depend on a reasonable assessment of the donor's capacity to give additional major gifts and probably reception to multiple campus requests. Timing of subsequent solicitations will also depend on the pay-out schedule of the previous gift, and whether it is to be completed in a single year or over several years. Clearly, some donors would not be prejudiced by renewed solicitation activity, while others could be alienated. Prospect management procedures will support efforts dedicated to preserving the good-will of major donors as well as those designed to increase the fruitfulness of established donor relationships.

APPENDIX: A Primer for Moves Management

Moves Management
A useful tool in major gift fundraising
Adapted from The Artful Journey – Cultivating and Soliciting Major Gifts By William J. Sturtevant as well as from the Institute for Charitable Giving which holds the trademark for "Moves Management"

Moves Management involves managing a series of steps (moves) with identified prospects (the 10 percent who can give 90 percent), the number and type of steps depending upon the individual involved, such that each prospect is moved from attention to interest to desire to action (AIDA) and then back to interest until he or she has given everything they will or can to your organization.

Moves Management provides an organized, systematic approach toward cultivating our greatest supporters – By employing and practicing Moves Management, we assure our strongest prospects a consistent and thoughtful approach from the University of Alaska.

A sound moves management system acknowledges the fact that major gift fundraising is highly personal – 90% of the gifts come from 10% of the givers – or, as is nationally emerging, 95% of the gifts come from 5% of the givers.

Moves Management is Nurture Fundraising – There is no other way to secure major gifts than through personal involvement, cultivation and solicitation. If we could secure major gifts through the mail or over the telephone, we would surely do so.

Moves Management is the best way to secure major gifts – This personalizes the development process by physically and psychologically getting in front of prospects.

Moves Management acknowledges that we must take our prospects one at a time -
You must take each prospect of your highest level prospects one at a time and develop strategies which are appropriate to the individual. This is the starting point for the implementation of Prospect Management. There is no way to generically differentiate major gift prospects. Broad demographics and psychographics work nicely in mass marketing – it is not vital to be highly personalized for a $50 contribution, but we must be completely focused on a particular donor with a $1 million appeal.

Moves Management involves taking the best prospects and considering first the others that need to be involved in the relationship building process. The following types of solicitors and other team members will be common to most major gift cultivations.

Natural Partners – These are the people who have a natural relationship with a given prospect and can recommend what kind of contacts would be best. Natural partners assist in building the needed relationships and helping to develop the strategies. Whenever confronted with a new prospect who has significant potential, Development Officers should ask, "Who knows this person?" With any given prospect Development Officers should think in terms of current donors, board members, friends and volunteers who might know him or her. Also consider staff members such as doctors, professors and curators. Why are natural partners important? There are three basic things natural partners to do.

1. Provide information to develop a strategy to approach our highest level prospects. For some best prospects, there would be no way to even get in front of them without such a strategy or without the direct assistance of a natural partner.
2. Natural partners can assist in cultivation. Most volunteers enjoy being involved in the cultivation process, especially when it's well done. A byproduct that must be understood is the fact that oftentimes those natural partners are being cultivated at the same time. Many natural partners will also be among the 10% who can give 90%
3. A natural partner may be asked to assist in the solicitation (further down the road). Rarely does one discuss solicitation early in the strategy development stage.

These natural partners (NP) are centers of influence for the prospect. It is common to have at least one NP for a given prospect.

Primary Player – The Primary Player (PP) is the NP who is in the best position to advance the relationship between a prospect and the university. Think in terms of leverage. The PP is the person most difficult to say no to, whether for an invitation to a cultivation event or in response to a gift solicitation. There may be more than one NP, but Prospect Managers normally want to search for someone who stands out as having significant leverage as the PP.

Discovery Solicitor – This solicitor (DS) only engages prospects in initial stages of communication and early solicitation (stages 1-2). The purpose of this level of solicitor ranking is to track early solicitation efforts, while allowing other solicitors to engage the prospect before a Prospect Manager might be determined. Discovery Solicitor status is requested through the Prospect Research and Management Director (in possible consultation with other development staff as needed).

Responsibilities of the Discovery Solicitor:

- Track each prospect's relationship with the organization;
- Plan contacts or moves for each prospect;

Prospect Manager – This is the fundraiser (PM) who monitors the institution's progress with a given prospect, and ensures that the organization maintains sufficient and appropriate contacts. Prospect Manager status is acquired only after the development staff have one or more discovery visits and initial qualification visits (stages 1-2) and have a clear understanding that the prospect is willing to entertain further cultivation activity and solicitations (stages 3-5) from a particular development officer. Prospect Manager status is requested through the Prospect Research and Management Director (in possible consultation with other development staff as needed). Only development staff should be Prospect Managers, not volunteers or administrative leaders.

Responsibilities of the Prospect Manager:

- Develop a documented strategy for each prospect;

- Act as a “gatekeeper” for ALL communication or solicitation efforts by any other entity within the UA system seeking to discover giving interests or cultivation efforts.
- Track each prospect’s relationship with the organization;
- Plan contacts or moves for each prospect;
- Coordinate and prepare natural partners and primary players;
- Execute the plan. In other words, see that the contacts or moves are made;
- Reconfigure the strategy as development activities progress and refine the plan accordingly;
- Finally, coordinate the refined plan and execute the newly formulated moves

Solicitor *ad hoc* – The Solicitor ad hoc is temporary relationship between a prospect and a development officer who is not the Prospect Manager, but wishes to cultivate the prospect for a one-time gift with the approval of the designated Prospect Manager. The Prospect Manager will determine the degree of autonomy, duration of assignment, and what responsibilities the solicitor ad hoc will temporarily hold.

What are Moves?

- Most moves represent cultivational steps. With the annual fund, all moves are solicitations, but in major gift fundraising, most activities can be described as cultivation. Every now and then, a move is a solicitation, but most contacts can be described as “mission directed” cultivation.

  - *In setting cultivational objectives, determine prior to each call, the best possible outcome and the minimum acceptable outcome.*

  - *Review the key points to be covered during the cultivational call*

  - *List a small number of benefits generated by programs/projects which will likely appeal to the prospect.*

  - *Determine what the prospect will be asked to do, agree to or react to. In other words, determine the desired resolution or next step in the process*

  - *List anticipated questions and responses to them*

- To be effective, a move must penetrate the consciousness of the prospect regarding the organization or a giving opportunity. Conversely, the fundraiser must learn something about the prospect and the possible giving opportunity. Cultivation must be in accordance with a documented strategy and be mission directed.
- A move can be made via telephone, letter or personal visit as long as it is an effective move.
- It is recommended that for the most likely prospects with the highest capacity, interest and affinity, more moves be planned per six months than the required one contact report.

Moves Management

I. Assignments

A. Staff Assignments Process- Any identified major gift prospects, not assigned to a Prospect Manager, may be initially assigned to a Discovery Solicitor through the Prospect Research and Management Director. When it becomes clear that the prospect is willing to entertain further cultivational activity, Prospect Manager status may be requested and assigned through the Prospect Research and Management Director.

1. Development officers maintaining existing relationships (pre-existing before implementation of these procedures) with prospects shall remain coded as Prospect Managers (PM).

2. Development officers who wish to make contact with an individual or organization that is not currently identified as a prospect in Raiser's Edge, should submit the name for clearance as a Discovery Solicitor to the Prospect Research and Management Director *prior to* any contact. Consultation may be necessary with other development staff. [Allow five working days response time on email.]

    a) If no conflicts occur, then the person who requested the assignment will be identified as a Discovery Solicitor

    b) Conflicts will be addressed in a meeting among the development staff involved and Prospect Research and Management Director and other staff deemed appropriate.

3. Key components that determine who will manage the prospect's activities are:

    *The Prospect's will and desire for specific cultivation
    *History of cultivation
      --contact with university
      --relationship with campus community
    *History of giving
    *Projected interest in the university
    *Solicitation readiness

4. The spouse of a prospect must also be considered during the assignment process to avoid two different Prospect Managers 'working' the same couple whenever possible.

5. Clearance must be obtained from a Prospect Manager p*rior to* ANY SOLICITOR contacting a prospect assigned to that Prospect Manager.

6. At any time, a Prospect Manager or Discovery Solicitor may end the Solicitor Relationship by placing a "To" date in the RE database solicitor relationship record

Prospect Management Coordination

II. Prospect Management Team

A. Prospect Management Team – A Prospect Management Team will consist of representatives from all MAUs and the UA Foundation. The membership will include the UA Foundation President, the Prospect Research and Management Director, the Corporate and Foundation Relations Manager, the chief development officer of each campus (and/or their designees) and other development/advancement services staff as needed (KUAC, Museum, data staff, etc.). The Prospect Management Team shall meet monthly, with additional ad hoc meetings as needed. The team will also be charged with making recommendations for improvement to the Prospect Management and Tracking System.

B. Prospect Management Meetings - The purpose of monthly prospect management meetings is to insure the best possible communication between development officers as they move prospects through the development pipeline. It makes fundraising business sense for regular joint consultation as prospects may easily become uneasy with relationships if it appears the development staff is not coordinating with each other. The Prospect Research and Management Director will prepare an agenda, items for discussion, identify new prospects and facilitate discussion on moves management issues. It is imperative that transparent relationships between development staff and prospects be maintained while evaluating the donor's interests.

Prospect Ratings and Ask Amounts

A. Overview

As part of PMATS, the UA Foundation will track various ratings and ask amounts.

B. Introduction: Major "Ratings"

UA is tracking various ratings and ask amounts, but there are three major "ratings" in RE. Each rating and ask amount is provided throughout this section, but the following paragraphs describe the three most important "ratings" that staff need to be familiar with:

1. **Capacity Rating**: a dollar range that expresses giving potential and is recorded as a code. This value expresses the staff's assessment of the prospect's capacity. It might be greater than the amount that will be asked for in the next solicitation, or it could be the same amount. Dollar ratings can, and often do, change over time.

   Major Gift category

   A1 = $1 million+
   A2 = $500,000-999,999
   A3 = $250,000-499,999
   A4 = $100,000-249,999
   A5 = $50,000-99,999
   A6 = $25,000-49,999
   A7 = $10,000-24,999 (not a major gift prospect at present)

   Staff members can assess constituents based on their performance as or potential to serve as volunteers

2. **Asking Amount (campaign ask)**: the total dollar amount that staff hope the prospect will commit to the most current, active campaign (to be documented in a proposal). This amount could be lower than the Rating. It also might be greater than the amount of the next solicitation, as some prospects will be asked for an early campaign commitment and a late campaign commitment. Because this field expresses the staff's "rating" for the prospect for the campaign, it is used to create the campaign gift pyramid.

APPENDIX B: Strategy Outline

Use of Strategy Templates

Upon receiving Prospect Management status, a PM will have 90 days to devise and outline a basic strategy for CURRENT cultivation/development efforts. The following template will be used. The strategy will be placed as a Note in Raiser's Edge, using the "Type" - University of Alaska General Notes, With a Title and Description of "Prospect Strategy". Failure to devise and document a strategy may result in the reassignment of the prospect. After 60 days a reminder of compliance will be sent to the Prospect Manager.

Template:

Goal of Strategy – what is the intended outcome of the relationship in the short and long terms.

Right Purpose of gift – in what way(s) could the prospect best help UA and in what areas does the prospect feel most enthusiastic comfortable about supporting

Right Team - Solicitor(s), Volunteer(s), Staff, Advisor(s) – who is the best staff/volunteer to advance the relationship (may involve transfer of PM status)? Who are the best natural partners/primary players to help realize the outcome of the strategy

Right Solicitation Date – what date(s) work to the best advantage of the prospect and UA

Stewardship (target date) – beyond standard practices, what stewardship functions might further advance the relationship (this line may commonly be left blank)

Actions to satisfy – what general outline for actions (next steps) needs to occur

Actions Completed – what actions may have already occurred prior to outlining the basic strategy

Updates and revisions to the strategy will likely be needed over time. Minor changes to the strategy can be written over existing text along with a time/date stamp (press F5) at bottom of the text field with a brief description of what was altered. Examples might be a slight change of intended gift amount, slight adjustments to ask dates, revisions to involved personnel. Major changes to the strategy necessitate a new note. Examples of major changes might be major changes to gift amount, different purpose of gift, new conditions under which the gift would be made,