I. CREATING PROPOSALS IN RAISER'S EDGE

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Context

Proposals are one section of the **Prospect** tab, a supplemental module in Raiser's Edge. Proposals can be assigned to individual or organizational records and be opened by anyone in the development office.

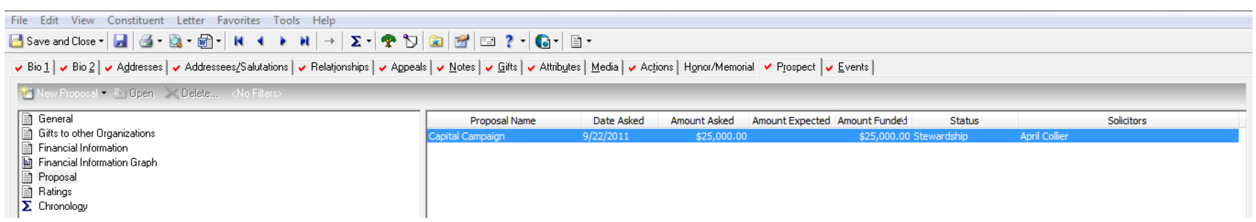
Seattle Prep uses proposals to document major gift and capital campaign solicitations from start to finish. When used correctly and consistently, proposals document the entire solicitation process, from the initial identification and research, to the solicitation or "Ask," and the requisite follow-up known as stewardship.

Proposals are used primarily by the gift officers, with secondary use by the gift processor. The following instructions are for proposals in the *Level the Field, Raise the Bar* capital campaign.

Creating A New Proposal

1. To create a new proposal, locate the **Prospect** tab in the tab navigation and click on it. Select **New Proposal** from the menu on the left and click on it. See Image 1 for reference.

Image 1. Prospect tab



The Proposal Menu

Seattle Prep uses several tabs within the Proposal Menu as outlined in Table 1. Proposals open on the General tab by default.

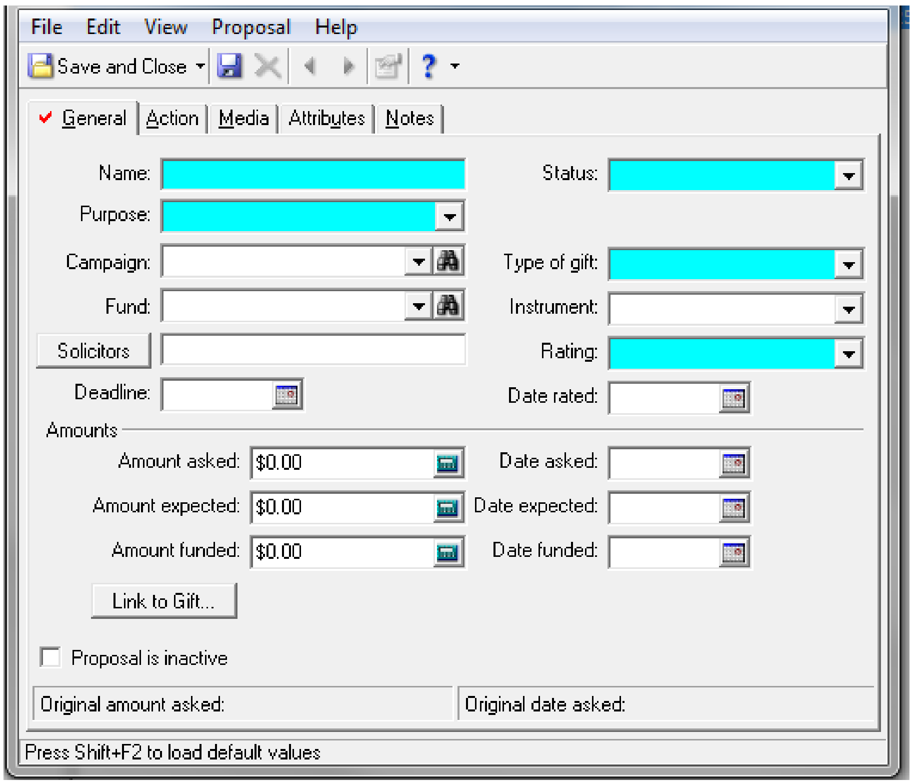
Table 1. Proposal Menu

Tab Name	Purpose
General	Use the **General** tab to document proposal details, assign ask amounts and solicitors, and to track the status of the proposal.
Action	Use the **Action** tab to record interactions with the prospect. This can include phone calls, emails, letter and the solicitation.

Media	Seattle Prep does not use this tab.
Attributes	Seattle Prep does not use this tab.
Notes	Use the **Notes** tab to record strategy and solicitation notes. This can include prospect inclination and affinity, prospect relationships with campaign volunteers, and the strategy around ask amount or timing.

2. Use the **General** tab to record the proposal details as shown in Image 2. Fields in blue are required and must be completed.

Image 2. General tab



For the *Level the Field, Raise the Bar* proposal, complete the following fields in the General tab in order according to Table 2. Use the Tab or Enter key to proceed to the next field.

Table 2. Completing Fields on the General tab

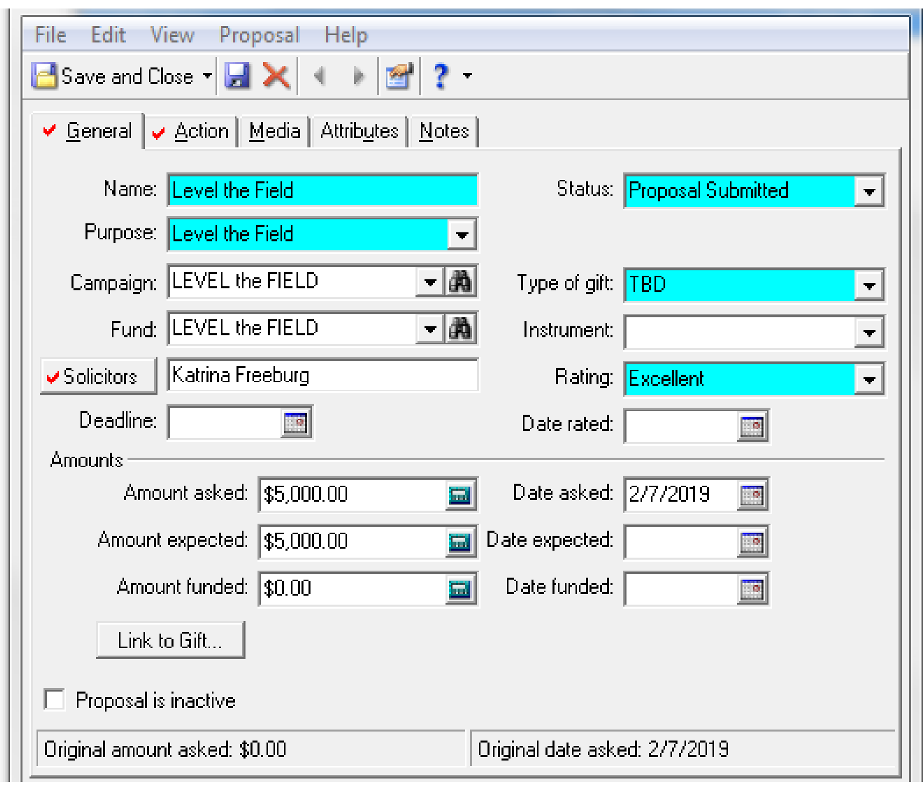
Field Name	Value
Name	There is no drop-down menu in this field, so type the complete proposal name of *Level the Field*. Frequently the campaign and proposal name are identical.

Status	Select the appropriate status from the dropdown menu. When opening a proposal, select *Identification*. See notes below to determine which status to assign later in the process.
Purpose	Select *Level the Field* from the dropdown menu.
Campaign	Select *Level the Field* from the dropdown menu.
Type of Gift	Select appropriate option from the dropdown menu. Generally, the gift type is *TBD* until the prospect indicates otherwise. The gift processor changes this field to the appropriate gift type when entering the gift or pledge.
Fund	Select *Level the Field* from the dropdown menu unless the prospect indicates affinity for a specific component of the campaign. For example, a preference for the *Learning Resource Center.*
Instrument	Seattle Prep does not use this field.
Solicitors	The solicitor is generally the President, Development Director or Major Gift Officer. If assigning a volunteer solicitor, assign a secondary staff solicitor so he or she can track the proposal. Use the search feature to link to the appropriate solicitor record. The solicitor must be an existing record in RE that carries the solicitor tag. If the solicitor's name does not appear in the search menu, ask the gift officer or gift processor for help locating the appropriate record.
Rating	Select the appropriate option from the dropdown menu. Generally, the rating is *Excellent* unless the gift officer indicates otherwise.
Deadline	Seattle Prep does not use this field.
Date Rated	Use the date the ask amount is determined.
Amount Asked	The gift officer completes this field with the targeted ask amount *before* making the ask.
Date Asked	The gift officer completes this field with the appropriate date *after* making the ask.

Amount Expected	The gift officer completes this field with the amount indicated by the prospect.
Date Expected	The gift officer completes this field with the date indicated by the prospect.
Amount Funded	This is the amount the donor decides to gift. The gift processor completes this field with the amount indicated on the pledge form.
Date Funded	This is the date the donor will pay the pledge. The gift processor completes this field with the date indicated on the pledge form.

See Image 3 for a completed proposal.

Image 3. A Completed *Level the Field, Raise the Bar* Proposal



After completing all of the appropriate fields, click the Save and Close button to exit the proposal.

Executing A Proposal

Once a proposal is open, the solicitor guides the prospect through the campaign conversation. Details of each interaction are noted in the **Action** tab, with proposal progress documented in the **Status** field of the General tab.

The Status Field

The **Status** field is a dynamic field used by several different individuals to document the evolution of the proposal process. Status and stage are used interchangeably and typically proceed in a specific order. Stages are defined below in Table 3 in order of occurrence.

Table 3. Status Fields Defined

Status Field	Definitions
Identification	Used when opening a proposal for the first time. At this point, there is little or no information about the prospect's interest in the campaign.
Research	Used when determining the ask amount and other strategy notes (i.e. connections with volunteer solicitors). This stage may be skipped for efficiency.
Cultivation	Used when the prospect attends a campaign event, or the solicitor begins the conversation with the prospect.
Solicitation	It's time to ask. Used when the solicitor determines the prospect is ready to receive a proposal. Complete the *Amount Asked* field simultaneously.
Proposal Submitted	Used after the solicitor makes a verbal or written request for support.
Accepted	Used after the donor has agreed to make a gift. Complete the *Amount Expected* and *Date Expected* fields simultaneously.
Declined	Used when the prospect declined the proposal. Note the reason why under the relevant action.
Stewardship	Used after the donor returns the pledge form.

Stages may be skipped for efficiency. The solicitor sets the initial status and only initiates contact with a prospect when the status is changed to **Cultivation** or **Solicitation**.

Once the solicitor asks for the gift, the status changes to **Proposal Submitted**. It remains Proposal Submitted until the prospect makes a decision. This discernment process can take several weeks or longer. During this time, the solicitor continues to follow up with the prospect. Once the prospect returns the pledge form or declines the proposal, the gift processor will update the status as appropriate.