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| **Plan** | **Set of predetermined steps required to close a gift. There are six plan outlines and development officers should use whichever plan best suits their purpose.** |
|  | **Plan Members** |
| Plan primary manager | Owner and creator of the plan |
| Plan secondary manager | Assists in plan and directly involved in plan. May complete steps if his/her name is listed as the step owner. |
| Plan secondary solicitor | Involved with qualification or cultivation activities but not necessarily part of the solicitation. Researchers can serve as secondary solicitors on prospects they have discovered and assigned. |
| Plan participant | Involved with the prospect and may be a volunteer or staff/faculty member. May or may not be involved with the solicitation on plan. |
|  | **Plan outlines (step templates)** |
| Annual Giving | Lasts for one year, generally applied to gifts of less than $25,000. |
| Major Giving | Lasts for ~2-3 years, generally applied to solicitations of $25,000 or more. |
| Principal Giving | Lasts for ~5 years, only applied to solicitations of $5,000,000 or more. |
| Corporate and Foundation Giving and Grant | Used by development officers working with corporations or foundations. |
| Qualification | Used when visiting a prospect for the first time, to qualify them for interest and/or capability. |
| Commitment | Used to steward a donor who has a documented planned gift or during a multiple-year pledge payment period. Should end when the pledge is fully paid or when planned gift matures. Commitment plans do not have opportunities. |
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| **Step** | **A section of a fundraising plan.** |
|  | **Plan step status** |
| Planned | This refers to a step in the future. You may place an unplanned contact report on a planned step but you cannot complete the step. |
| Pending | A pending step is one that is currently being implemented. You may place either a contact report or unplanned contact report on a pending step. A pending step can be completed. |
| Completed | When the tasks, moves or contacts associated with the step have been completed and the strategy has moved to the next step, the status is marked completed. |
| Cancelled | The step is no longer valid. |
| Declined | Do not use this step status. If a fundraiser does not want to use a template step, he/she should delete it. |
| **Stage** | **Associated with a step in a plan. Indicates the prospect's place in the solicitation cycle.** |
| **Contact Report** | **The record of contact with a prospect that is associated with a plan. A contact report charts activity which moves a prospect closer to a gift. A contact report can close a step.** |
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|  | **Contact Methods** |
| Personal visit (on- or off-campus) | A face-to-face encounter where substantive activity associated with the plan occurs. On-campus refers to any visit in Chapel Hill where the prospect does not reside in Chapel Hill. |
| Email | An email exchange that furthers the cultivation, solicitation or stewardship of the prospect. |
| Mail | A substantive exchange by mail, for example a proposal or gift agreement. |
| Phone | A telephone call that furthers the cultivation, solicitation or stewardship of the prospect. |
| Internal meeting | A meeting with other University staff or faculty to discuss plan elements. This could be a strategy session. |
| Task | Other activities necessary to the completion of a plan. For example, this could be the drafting of a gift agreement, entering a research request, or creating a planned gift scenario for a prospect. |
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| **Opportunity** | **The amount of money and the purpose of the solicitation. Each opportunity is associated with a plan. An opportunity can have any number of designations associated with it. Each plan can only have one opportunity.** |
|  | **Opportunity Status** |
| Unqualified | Preliminary figure for planning purposes |
| Qualified | Amount and purpose have been established and are ready to be presented |
| Response Pending | The solicitation has occurred and a response from the prospect has not been received. |
| Accepted | The prospect confirms that he/she will contribute based on the solicitation. The amount and designation do not necessarily match the ask. This does not mean the gift or pledge is booked. Gift services staff can link an accepted opportunity to incoming revenue. |
| Rejected | The prospect declined to fund the proposal or solicitation. |
| Cancelled | The opportunity is no longer valid. |
| Opportunity type | Aligns with campaign priorities. Currently not in use. |
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| **Interest** | **Located on the Constituent view (personal tab), this is the school or unit that the prospect has interest in funding. Fundraisers can add interests.** |
| **Funding Interests** | **Located on the Prospect view (Funding Interests tab), this is the general interest area that the prospect has demonstrated interest in. For example, art, health care, environment.** |
| **Interaction** | **A contact with a constituent that is NOT associated with a plan. All users can add interactions. The list of interactions for a prospect includes completed and pending steps on plans as well as interactions added outside of plans.** |
| **Prospect Status** | **Rating. Located on the prospect view of a constituent record.** |
| **Prospect team** | **All members of any plan associated with the prospect, the prospect manager and any other development staff who request to serve on the team.** |