Best Practices for Prospect Management, Prospect Contacts and Prospect Proposals in Banner Advancement

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Prospect Management, Prospect Contacts and Prospect Proposals, when kept simple in Banner Advancement, can be put in the hands of fundraisers to manage their own prospects and portfolios.

When data management expectations are properly balanced--keeping in mind their job is to raise money, not be over-burdened with data input--successful staff training and prospect management expectations can be accomplished.

This session will cover many ways to ensure fundraising staff can enter their own contacts and manage their own prospects and proposals.
SIG Background

- Established in 1987, headquarters located in San Diego, California
- Largest privately held consulting firm in the US focused exclusively on higher education
- First and largest Ellucian ‘Authorized Services Partner’ in the U.S.
- Successfully provided services to over 400 colleges and universities in more than 40 states and 5 countries
- Over 375 Banner® clients
- SIG product experience includes: Banner, Colleague, Oracle, and Workday
SIG Services

- **Banner 9 Implementations**
- Procurement/Product Selection
- Business Process Improvement
- Optimization of ERP systems
- ERP Implementations
- Integrations/Interfaces
- Functional & Technical Consulting
- Identity Management
- Reporting & Business Intelligence
- Remote Database Administration
- Staff Augmentation
- Project Management
- Many other custom services
In this session, we’ll cover the following topics…

- What are the needs of fundraising staff?
- What are the products we can use out of the box?
- Briefly, how do we set them up?
- How can we keep prospect management simple?
- How can we keep proposals simple/manageable?
- How do staff enter contacts on AMACONT?
- How do we put the tools in their hands and train them?
- How do we keep the data clean and reliable?

All these are important in order for fundraisers to be able to manage their own prospects and proposals!
What are the needs of traveling staff?

From the VP to college deans…
Fundraisers to support staff…
The college president or a grants writer…

The tools we’ll be showing today can be used to effectively manage data in Banner and will especially appeal to the casual user!
What are the needs of fundraisers?

Quick!

- First and foremost, it must be quick and efficient

Direct Access to the Data

- Don’t want to (and, should NOT) keep data on a laptop
- Don’t want to have to write a query from a data warehouse, etc.
- Need to see the most recent activity in the record, especially when they are out of the office… ►Just gave ►Recently moved ►New job

Has to be flexible and accommodating!

MUST be easy to use!

- Need to feel it is a good use of their time
What are the products we can use “Out of the Box”?

- Internet Native Banner Advancement module
- Luminis Channels for Banner Advancement
- Banner Advancement Self-Service
### What can we use out of the box?

In Banner Advancement, these forms most easily query data...

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APASBIO – Advancement Individual Summary</td>
<td>form (the “Super Bio” form)</td>
</tr>
<tr>
<td>AFCCAMP – Campaign List</td>
<td></td>
</tr>
<tr>
<td>APAGHIS – Giving History Summary</td>
<td></td>
</tr>
<tr>
<td>APAFHIS – Giving History by Fiscal Year</td>
<td></td>
</tr>
<tr>
<td>APACHIS – Giving History by Campaign</td>
<td></td>
</tr>
<tr>
<td>APADHIS – Giving History by Designation</td>
<td></td>
</tr>
<tr>
<td>APAGSUM – Giving/Membership Summary</td>
<td></td>
</tr>
<tr>
<td>APACLUB – Gift Society List</td>
<td></td>
</tr>
<tr>
<td>APACOMB – Combined Giving History</td>
<td></td>
</tr>
<tr>
<td>APIACTY – Activity List</td>
<td></td>
</tr>
<tr>
<td>AOCCONL – Advancement Organization Contacts List</td>
<td></td>
</tr>
<tr>
<td>AMAPOOL – Prospect Pool Inquiry form</td>
<td></td>
</tr>
<tr>
<td>AMCSTGY – Strategy Plan List form</td>
<td></td>
</tr>
<tr>
<td>AMAPROS – Moves by Prospect form</td>
<td></td>
</tr>
<tr>
<td>AMAPROJ – Moves by Project form</td>
<td></td>
</tr>
<tr>
<td>AMASTAF – Moves by Staff form</td>
<td></td>
</tr>
<tr>
<td>APCADDR – Advancement Address List</td>
<td></td>
</tr>
</tbody>
</table>
But, sometimes you don’t want to use Banner while on the road (depends on the way different institutions allow access to the Banner forms outside of their domain)

In that case, we need to turn to the Web-based products…

- Ellucian Luminis Platform
  - Specifically, the Luminis Channels for Banner Advancement
- Self-Service for Advancement Officers

Let’s review the Web-based products and some key points regarding each…
What can we use – Luminis…

Luminis Advancement Prospects channel(s) –

- View prospects, all of which are assigned in the Prospect Management module, on Banner form AMAINFO
- See summary of prospect’s giving history
- See contacts (call reports) for the prospect and associated dates
- Navigate to various levels of detailed profiles for the prospect
- Navigate to an Add a Contact form to enter a new contact or edit a previous one
- *I recommend adding this channel multiple times, one for each status code*

Luminis Advancement Schedule channel –

- See highlighted dates on a calendar for when Planned Moves are due for your prospects
- Click to see the Move, navigate to prospect’s profile or Add a Contact
- Requires the use of Banner Moves Management, meaning Strategy Plans
  ~ *FYI, I don’t recommend the use of Strategy Plans, form AMAPLAN, in Banner…*
What can we use – Luminis...

Luminis Advancement Campaign channel(s) –

- See visual progress towards campaign goal via a filled-in thermometer
- View the dollar goal for the campaign
- See total amount of Gifts received for the campaign
- See Pledges Due which are outstanding for the campaign
- See Waiting Matching gifts for the campaign
- See Total attainment for the campaign
- Navigate directly to the Campaign Header form in Banner
- See Total Donor count for commitments to the campaign
- Navigate to view detailed Gifts for the campaign
- Navigate to view detailed Pledges for the campaign

I recommend adding multiple Advancement Campaign channels to view the progress on as many individual fund-raising campaigns as possible / desired!
What can we use – Luminis...

Luminis Advancement Research channel –

- This is a delivered channel, however, links don’t work out until set up in WebTailor
- Gives you a good way to add your own links in whatever manner you wish in order to manage your product(s) the way you want / need
- It does have two particularly good things… it allows navigation directly to Banner forms from Luminis. It also provides direct navigation to the “Advancement Officers Searches” menu in Self-Service for Advancement Officers
- Here is example of how we modified this channel… which is easy to do!

Goes to “Advancement Officer Searches” in Self-Service

<table>
<thead>
<tr>
<th>Advancement Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Chg. a Prospect</td>
</tr>
<tr>
<td>Add/Chg. a Proposal</td>
</tr>
<tr>
<td>Add/Chg. a Contact</td>
</tr>
<tr>
<td>Prospect Search</td>
</tr>
<tr>
<td>ODS Metadata</td>
</tr>
<tr>
<td>Research Request</td>
</tr>
<tr>
<td>Form</td>
</tr>
<tr>
<td>The ResearchPoint</td>
</tr>
</tbody>
</table>

These 3 open the Banner forms…
- AMAINFO for Add/Chg. a Prospect
- AMAPROP for Add/Chg. a Proposal
- AMACONT for Add/Chg. a Contact
What can we use – Luminis…

Luminis My Banner channel –

- A great way to quickly navigate to your favorite Banner forms
- Mirrors what you have set up in My Banner folder in Banner (my recommendations for what to include are on next slide…)

My Banner

- Advancement Individual Information [APACONS]
- Advancement Individual Summary [APASBIO]
- Advancement Prospect Information [AMAINFO]
- Advancement Officer Web Profile Items Validation [ATVDOWP]
- Advancement Identification [APAIDEN]
- General Message [GUAMESG]
- Organize My Banner [GUAPMNJO]

Banner

- Student [ *STUDENT]
- Advancement [ *ALUMNI]
- Financial [ *FINANCE]
- Human Resources [ *HR8]
- Financial Aid [ *RESOURCE]
- General [ *GENERAL]
What can we use – Luminis...

Here are my recommendations for a fundraisers’ My Banner/channel...

Only if using Strategy Plans
What can we use – Luminis…

Luminis My Reports channel –

- Run a job using GJAPCTL job submission control form in Banner
- Put DATABASE in Printer field on the parameters page
- Output of the job—the report—displays in this channel in Luminis!

In summary, Luminis is an easy way to present meaningful data to casual end users, i.e. fundraisers, via the various Luminis Channels for Banner Advancement…

- Use as many or as few of the delivered channels as desired
- Recommend replicating the Advancement Prospects channel multiple times, for however many Prospect Status codes you maintain
- Don’t recommend use of the Schedule channel, unless you use Moves Mgt.
Another product we can use Out of the Box

Self-Service for Advancement Officers – a.k.a. Banner Self-Service

- Real-time searching and data updating capabilities
  - Works with or without the Luminis Channels for Banner Advancement
  - If you do have Luminis, be sure to set up to automatically authenticate users in to your Self-Service products to avoid need to repeat logging in

- 1st time users will need to set up Profile Preferences (once)
  - General Profile Preferences
  - Constituent Profile Preferences
  - Organization Profile Preferences
  - Prospect Profile Preferences

These settings are then saved for each user, from that point forward
What can we use – Self-Service...

Moves Management

- Add a Contact
- Add a Move
- Current Moves
- Planned Moves by Date
- Moves by Constituent
- Moves Search
- Passed Planned Moves Exist

Whenever planned moves exist in the system for which the date has passed, this item will appear on nearly every Self-Service menus in order to call attention to the overdue item...

View Contacts –

- Go directly to the login user’s assigned prospects, on AMAINFO form in Banner

Add a Contact –

- Same as entering a contact on the APACONT/AMACONT form in Banner!
What can we use – Self-Service...

Advancement Officer Searches –
- ID Number Search
- Name Search
- Individual or Organization Constituent Search
- Prospect Search

How to Create a New Custom Search & Update Custom Search buttons
- First, give it a name and description, Save
- Go back and use the Update button to edit
- Determine how many/few criteria to include in the custom search. You can also change the order in which they appear

- Once created, Custom Searches show on the Advancement Officer Searches menu for this user from this point forward!
What can we use – Self-Service...

Manage My Prospects page – one of the best things in Self-Service for Advancement Officers!
How do we set it up?

Banner Validation Tables…
Web Tailor and Advancement Tailor settings…
GUAIDEN and GOAEACC…
How do we set it up?

Banner Validation Tables which need to be set up include…

- ATVPRST – Prospect Status
- ATVREFR – Reference Code

(Both of these are used by the Advancement Prospect channel)

- ATVSCNT – Solicitor Contact Code – Web indicator
- ATVSCRS – Solicitor Contact Result Code – Web indicator
- ATVDOWP – Advancement Officer Web Profile Items
- ATVDOSR – Advancement Officer Search Options
- ATVDOPP – Adv. Officer Web Manage My Prospects
**Banner Self-Service**

- Personal Information
- Alumni and Friends
- Advancement Officer Services
- Faculty & Advisors
- Employee
- WebTailor Administration
  - Customize a Web Menu or Procedure
  - Customize a Graphic Element
  - Customize a Set of Information Text
  - Customize a Set of Menu Items
  - Update User Roles
- Finance

**Update Roles for the Selected User**

You have selected: Dacy L. Wilcox

- Advancement Data Tailor
- Advancement Moves Manager
- Banner Channel Administration
- Development Officer
- EPAP Administrator
- Effort Certification Administrator
- Executive
- Faculty Compensation Administrator
- Faculty Feedback Administrator
- Finance Data Tailor
- Financial Aid Snapshot Admin
- Financial Aid Staff
- HR Manager
- Labor Redistribution Initiator
- Master Salary Planner
- Web Tailor Administrator
- Web for Executives Administrator

(You, as the manager, will also need these two, in green...)

Do for each user...
How to set things up, con’t.

There’s more set up to be done, more than we can cover here…

- Setting Profile Preferences needs to be done for each user…
  - General Profile Preferences
  - Constituent Profile Preferences
  - Organization Profile Preferences
  - Prospect Profile Preferences

- Or, set defaults in Banner on ATVDOWP – Web Profile Items val. table

- How to Edit channels and Add channels in Ellucian Luminis Platform

- And, all staff must have an entries on these Banner General forms
  - GUAIDEN and, GOAEACC!

  ♦ If not, the Luminis channels will give strange results!
Prospect Management – How can we keep it simple?

Realistic, straight-forward policies and procedures will help…
Some disclaimers on methodology!

- The following are suggested plans, policies, procedures and requirements to keep Prospect Management simple
  - There is no need to modify the Banner product(s)
  - Take some liberties and use some fields in a different manner than they may have originally been intended
  - I do not recommend the use of Banner-delivered Moves Management / Strategy Plan
    - There’s nothing wrong with it, per se. I encourage you to try it out, but it adds an unnecessary level of complexity, in my opinion

- You can be effective with a modified, simple method for prospect management, thus, enabling your fundraisers to maintain and manage their own prospects while not overburdening them with too much data input
  - A Win-Win situation

Let’s jump right to seeing how it works!
Keep Prospect Management simple

How to use AMAINFO – the Prospect Management Information form

Enter DS in Reference field.

Refer to the Status field as your Quick-Reference or “Q code”

0 - Suspect/Not Major Gift  A - Active Status
1 - Prospect Identified      I - Inactive Status
2 - Prospect Qualified      3 - Cultivation Phase
4 - Intense Cultivation/Ask soon
5 - Solicited
6 - Temp. Stewardship/Just Gave
7 - Permanent Stewardship
AMAINFO – the Prospect Management Information form in Banner

- Enter DS (for Development Staff) in Reference field; required
- Enter a Q-code (0 through 7, A or I) in Status field; required. Save
  - If prospect is no longer considered an active prospect, set Status field to I for inactive; fundraisers can leave themselves as staff assigned or change to another staff member, if desired.
  - Additional examples, which can be considered
    - Mark prospect Active, leave assigned, means not actively working that prospect at this time
    - Mark prospect Inactive, but leave assigned, means not a prospect… can also change Staff Assignment to however you code general development
    - Think prospect has capacity to give, but not at major gift level, change Status to Active and Staff Assignment to annual giving staff
      - Be sure to add a Contact on AMACONT to document what you did
Goal for fundraisers is to have prospects which are coded with a Q-code of 1 through 7 to indicate the “Status”, or level, they are currently “at” with the prospect.

Target Information block

- REQUIRE an Asking Amount and Asking Date once a prospect reaches a Q-code Status of 4-Intense Cultivation/Ask soon. It is recommended to always enter these a.s.a.p., but it not formally required until this stage
  - Use data integrity scripts to ensure enforcement of this requirement

- Let the system automatically calculate Asking Amount based on the average of the ratings entered on the Ratings tab
  - If need to change ask amount away from the average of all ratings, uncheck the Primary box from any rows on the Ratings tab, go back to Target Information block, pull down and select Manual without Override, then enter an Asking Amount; Save
Keep Prospect Management simple

Ratings tab

- A required tab
- Enter D for donor in the Type field, tab to the Rating field
- Enter a Rating; values on ATVRATE
- Tab past Primary, leave blank
- Tab to Rater Type field
  - Put word STAFF in Rater Type
  - Other choices may include…
    - Faculty/non-dev staff
    - Local/regional committee
    - Other alumnus/alumna
    - Peer or classmate
    - By the Univ. President
    - By a Univ. Trustee

NR has not yet been rated
NS rating needs staff review
RA rated, $1,000,000 possible
RB rated, $500,000 possible
RC rated, $250,000 possible
RD rated, $100,000 possible
R1 rated, $50,000 possible
R2 rated, $25,000 possible
R3 rated, $10,000 possible
R4 rated, $5,000 possible
R5 rated, $2,500 possible
R6 rated, $1,000 possible
R7 rated, $500 possible
R8 rated, $250 possible
R9 rated, $100 possible
RE rated excellent, no amt.
RF rated fair, no amount
RG rated good, no amount
RN rated as not a prospect
RP rated as prospect, no amt.
RQ rated, but questionable
RU raters discussed, no decision
Keep Prospect Management simple

Ratings tab, con’t.

- Tab past Date, can’t be changed
- Tab to Rater field, use staff initials, which are maintained on GUAIDEN; or…
- If the actual person who rated is not a staff member listed on GUAIDEN, but does have a record in Banner, leave the Rater field blank and put their Banner ID in the ID field

♦ *If the rater can’t be determined, simply enter your code for General Development Staff*

<table>
<thead>
<tr>
<th>Type</th>
<th>Rating</th>
<th>Primary</th>
<th>Rater Type</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>As a prospective donor,</td>
<td>R6 rated, $1,000 possible,</td>
<td></td>
<td>STAFF</td>
<td>29-JAN-2012</td>
</tr>
<tr>
<td>Smittle, David</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Keep Prospect Management simple

Staff Assignments tab

- A required tab
- In the Type field, enter CULT for Cultivation or SOLI for Solicitation (everyone must have at least a CULTivation assignment)
- Tab to the Primary field; click or hit the space bar to put a checkmark in this box; optional (I suggest this be a requirement)
  - If your institution has the Operational Data Store (ODS), if at least one staff member is not marked Primary, one of the ODS views doesn’t populate correctly. For this and other reporting reasons, I suggest required
- Tab to the Staff field; enter staff initials from GUAIDEN
  - Or, can assign someone else using ID field
- There can be multiple staff assigned as doing CULT
  - If the ask will be made by someone other than the staff member assigned for CULTivation, arrow down to blank row and add Staff or ID of SOLIcitor
- Save (Note: Banner v 8.5 introduced Active box and End Date fields on this form)
Staff Assignments tab, con’t.

Banner version 8.5 introduced an Active checkbox and End Date field on the Staff Assignments tab. The use of these fields is fairly self-explanatory. The benefit of this change is that a history (audit trail) of staff assignments can now be maintained, reflecting the staff who’ve worked with a prospect, over time.

If no project/interest area needs to be entered, the user may leave the AMAINFO form at this point... *(I do recommend the use of project/interest area for prospects...)*
Keep Prospect Management simple

AMAINFO – a completed Project / Interest Area example…

<table>
<thead>
<tr>
<th>Code</th>
<th>Giving Vehicle</th>
<th>Target Ask Date</th>
<th>Target Ask Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>AACURR</td>
<td>A-Annual Fund/Curr Oper, A&amp;S</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>A Active Status/Project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCBLDG</td>
<td>P-Pharmacy Building Cap./Plant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>A Active Status/Project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UESCH</td>
<td>U-Endowed Scholarships, Univ.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>A Active Status/Project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Keep Prospect Management simple

Projects and Interest Area tab

- An optional tab
  - Remember, when using the Prospect Contacts form AMACONT, it requires at least one project. If no project is known at the time of the contact, suggest use of the code “0-Project yet to be determined.” Enter a valid project by simply typing over existing data to enter all fields…

- In the Code field, enter a valid project from ATVPROJ

- Tab to the Giving Vehicle field; determine how project has been or will likely be funded, using codes on ATVGIVH

- Tab to the Status field
  - Choices are Active or Inactive

- Tab to Project Text field
  - Enter simple notes to yourself
    - NOT shown on any profile

- Save (enter as many projects as needed)
Keep Prospect Management simple

How to structure Project/Interest Area codes...

- It is important to build the codes by keeping in mind how they will display in the Self-Service products (which is always alpha by the description)
  - You need a generic code to add Contacts on AMACONT, for prospects who have no project/interest area (yet)
    - Suggest creating the code “0-Project yet to be determined.”
      - Having a description begin with a zero always forces this entry to the top of the alpha list of codes in S.S.A.O.
  - Suggest grouping the project codes by college, if you have college-based fundraisers
  - The code has a 6-character limit. Build logic into the coding structure to allow for future querying and reporting based on the individual characters in the code
    - The first character can be used to specify the college code...
      - A = Arts & Sciences
      - B = Business
      - E = Engineering
      - F = Performing Arts Ctr.
      - L = Law
      - P = Pharmacy
      - S = Sports teams or athletics
      - U = Gen. University
How to Structure Project Codes

- The second character is used for the type of funds...
  A = Annual Fund or Current Operations
  C = Capital Projects or Plant Funds
  E = Endowed Funds
  X = Unknown or generic

- Characters 4 through 6 are free-format and are used to describe the project/interest area... For example...

  ACMATH is Arts & Sciences, Capital, Mathile Center
  UACURR is General University, Annual Fund, Current Operations
  BELOAN is Business, Endowed, Loan Fund(s)
  PAPSKE is Pharmacy, Annual Fund, Pharm. Skills Enrichment Fund
  PCPSKC is Pharmacy, Capital, Pharmacy Skills Center (which is Plant)
  ECENTR is Engineering, Capital, Biggs Addition/Entrance (it’s Plant)
  FEPERF is Freed Center, Endowment, Performance Underwriting
  SAWRCC is Sports/Athletics, Annual Fund, Wrestling Coach Campaign
  SCWRLR is Sports/Athletics, Capital, Wrestling Locker Room (it’s Plant)
  UCSTUC is General University, Capital, Student Center (it’s Plant)
  UASIF is General University, Annual Fund, Strategic Initiative Fund

(Note: the codes don’t always have to be 6 characters...)
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code</th>
<th>Description</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Project yet to be determined</td>
<td>BXSTUA</td>
<td>B-Student Aid (not SCH), Bus.</td>
<td>LCMOCK</td>
<td>L-Mock Trial Courtroom, Law</td>
</tr>
<tr>
<td>AACCUR</td>
<td>A-Annual Fund/Curr Oper, A&amp;S</td>
<td>EACURR</td>
<td>E-Annual Fund/Curr Oper, Engr.</td>
<td>LCRARE</td>
<td>L-Tilton Rare Book Room, Law</td>
</tr>
<tr>
<td>ACCAP</td>
<td>A-Capital Funds/Projects, A&amp;S</td>
<td>ECCAP</td>
<td>E-Capital Funds/Projects, Engr.</td>
<td>LEARES</td>
<td>L-Academic Research, Law</td>
</tr>
<tr>
<td>ACMATH</td>
<td>A-Mathile Center Cap./Plant</td>
<td>ECENTR</td>
<td>E-Biggs Addition/Entrance,Engr.</td>
<td>LEHANS</td>
<td>L-Hanson Scholarship, Law</td>
</tr>
<tr>
<td>ACPRSR</td>
<td>A-Presser Hall Cap./Plant</td>
<td>ECESC</td>
<td>E-Engr. Research Center, Plant</td>
<td>LEHRTG</td>
<td>L-Heritage Fund, Endowed, Law</td>
</tr>
<tr>
<td>AELECT</td>
<td>A-Lecture Series, A&amp;S</td>
<td>EELECT</td>
<td>E-Lecture Series, Engineering</td>
<td>LEOAN</td>
<td>L-Loan Funds, Law</td>
</tr>
<tr>
<td>AEL0AN</td>
<td>A-Loan Funds, A&amp;S</td>
<td>EEL0AN</td>
<td>E-Loan Funds, Engineering</td>
<td>LEMOCK</td>
<td>L-Moot Courtroom Endowed Seats</td>
</tr>
<tr>
<td>AESCH</td>
<td>A-Endowed Scholarships, A&amp;S</td>
<td>EESCH</td>
<td>E-Endowed Scholarships, Engr.</td>
<td>LESCH</td>
<td>L-Endowed Scholarships, Law</td>
</tr>
<tr>
<td>AXANR</td>
<td>A-Nursing Program, all areas</td>
<td>EESPT</td>
<td>E-Spotts Lecture Series, Engr.</td>
<td>LXAENR</td>
<td>L-Academic Enrichment, Law</td>
</tr>
<tr>
<td>AXSTUA</td>
<td>A-Student Aid (not SCH), A&amp;S</td>
<td>EXAENR</td>
<td>E-Academic Enrichment, Engr.</td>
<td>LXSTUA</td>
<td>L-Student Aid (not SCH), Law</td>
</tr>
<tr>
<td>BACUBA</td>
<td>B-Center Cuban Studies, Bus.</td>
<td>FEPERF</td>
<td>E-Freed Ctr Perf. Underwriting</td>
<td>PABOBM</td>
<td>P-Robert W. McCurdy Fund/AF</td>
</tr>
<tr>
<td>BACURR</td>
<td>B-Annual Fund/Curr Oper, Bus.</td>
<td>LACURR</td>
<td>F-Annual Fund/Curr Oper, Law</td>
<td>PACURR</td>
<td>P-Annual Fund/Curr Oper, Pharm</td>
</tr>
<tr>
<td>BCBLDG</td>
<td>B-Diehl Business Bldg.</td>
<td>LALOAN</td>
<td>L-Loan Funds, Law</td>
<td>PAPLAW</td>
<td>P-Pharmacy Law Institute</td>
</tr>
<tr>
<td>BCCAP</td>
<td>B-Capital Funds/Projects, Bus.</td>
<td>LALSEN</td>
<td>L-Law Ann.Giv. Senior Campaign</td>
<td>PAPSKK</td>
<td>P-Pharmacy Skills Enrichment Fund</td>
</tr>
<tr>
<td>BEARES</td>
<td>B-Academic Research, Bus.</td>
<td>LCACRM</td>
<td>L-Tilton Alumni Courtroom, Law</td>
<td>PCBLDG</td>
<td>P-Pharmacy Building Cap./Plant</td>
</tr>
<tr>
<td>BEBU79</td>
<td>B-Class of 1979 Campaign, Bus.</td>
<td>LCBLDG</td>
<td>L-Tilton Hallof Law Cap./Plant</td>
<td>PCCAP</td>
<td>P-Capital Funds/Projects, Plant</td>
</tr>
<tr>
<td>BELECT</td>
<td>B-Lecture Series, Bus.</td>
<td>LCCAP</td>
<td>L-Capital Funds/Projects, Law</td>
<td>PCENTR</td>
<td>P-Pharmacy Bldg. Entrance Proj</td>
</tr>
<tr>
<td>BELOAN</td>
<td>B-Loan Funds, Bus.</td>
<td>LCCLASS</td>
<td>L-Tilton Classroom Remodel, Law</td>
<td>PCMAKE</td>
<td>P-Hakes-Pierstorf Bldg, Pharm.</td>
</tr>
<tr>
<td>DESCH</td>
<td>B-Endowed Scholarships, Bus.</td>
<td>LCHANR</td>
<td>L-Hanson Reading Room, Law</td>
<td>PCPSKC</td>
<td>P-Pharmacy Skills Center/Plant</td>
</tr>
<tr>
<td>BXAENR</td>
<td>B-Academic Enrichment, Bus.</td>
<td>LCLLIE</td>
<td>L-Law Library Cap./Plant Funds</td>
<td>PEARES</td>
<td>P-Academic Research, Pharm.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PEDINF</td>
<td>P-Drug Information Center</td>
</tr>
</tbody>
</table>

Notice how the Description has the first letter of the college, too!
# Project code examples

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>PELECT</td>
<td>P-Lecture Series, Pharmacy</td>
<td>UACREU</td>
<td>U-Class Reunion Campaigns</td>
</tr>
<tr>
<td>PELOAN</td>
<td>P-Loan Funds, Pharmacy</td>
<td>UACURR</td>
<td>U-Annual Fund/Curr Oper, Univ.</td>
</tr>
<tr>
<td>PESCH</td>
<td>P-Endowed Scholarships, Pharm.</td>
<td>UASENR</td>
<td>U-UG Ann. Giv. Senior Campaign</td>
</tr>
<tr>
<td>PESEBO</td>
<td>P-Sebok Lecture Series, Pharm.</td>
<td>UASIF</td>
<td>U-Strategic Initiative Fund/AF</td>
</tr>
<tr>
<td>PXAENR</td>
<td>P-Academic Enrichment, Pharm.</td>
<td>UASTAF</td>
<td>U-Campus Campaign, Univ.wide</td>
</tr>
<tr>
<td>PXSTUA</td>
<td>P-Student Aid (not SCH), Pharm</td>
<td>UC21CC</td>
<td>U-Last Univ.Campaign (1992-98)</td>
</tr>
<tr>
<td>SAROSE</td>
<td>S-Gary Rose Mem. Camp., Sports</td>
<td>UCCAP</td>
<td>U-Capital Funds/Projects, Univ</td>
</tr>
<tr>
<td>SAWRCC</td>
<td>S-Wrestling Coaches Campaign</td>
<td>UCCCHPL</td>
<td>U-Chapel Building/Facilities</td>
</tr>
<tr>
<td>SCSOCL</td>
<td>S-Soccer FieldLighting Project</td>
<td>UCFARM</td>
<td>U-Hillier Farm/ONU Nature Ctr.</td>
</tr>
<tr>
<td>SCSTAD</td>
<td>S-Football Stadium</td>
<td>UCHLIB</td>
<td>U-Heterick Library Cap./Plant</td>
</tr>
<tr>
<td>SCWRLR</td>
<td>S-Wrestling Locker Room, Plant</td>
<td>UCSTUC</td>
<td>U-Student Center Cap./Plant</td>
</tr>
<tr>
<td>SXATHL</td>
<td>S-General Athletics (not STAD)</td>
<td>UECHAR</td>
<td>U-Endowed Chairs, Univ. wide</td>
</tr>
<tr>
<td>UACREU</td>
<td>U-Class Reunion Campaigns</td>
<td>UELECT</td>
<td>U-Lecture Series, Gen. Univ.</td>
</tr>
<tr>
<td>UACURR</td>
<td>U-Annual Fund/Curr Oper, Univ.</td>
<td>UELOAN</td>
<td>U-Loan Funds, General Univ.</td>
</tr>
<tr>
<td>UAPAR</td>
<td>U-Ann. Giv. Parents Campaign</td>
<td>UEROBB</td>
<td>U-The Robby Campaign</td>
</tr>
<tr>
<td>UASIF</td>
<td>U-Strategic Initiative Fund/AF</td>
<td>UXAENR</td>
<td>U-Academic Enrichment, Univ.</td>
</tr>
<tr>
<td>UASTAF</td>
<td>U-Campus Campaign, Univ.wide</td>
<td>UXCDC</td>
<td>U-Child Development Center</td>
</tr>
<tr>
<td>UC21CC</td>
<td>U-Last Univ.Campaign (1992-98)</td>
<td>UXCLUB</td>
<td>U-Alumni Clubs, regionally, etc</td>
</tr>
<tr>
<td>UCCAP</td>
<td>U-Capital Funds/Projects, Univ</td>
<td>UXSTUA</td>
<td>U-Student Aid (not SCH), Univ.</td>
</tr>
<tr>
<td>UCCCHPL</td>
<td>U-Chapel Building/Facilities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Prospect Proposals – Keep them simple and manageable

You can do a lot or a little with this new form…

I recommend you just do a little.
Keep Proposals simple and manageable

AMAPROP form

- Almost everything to be decided/designed on the proposal form should be done to help keep the entry of Prospect Contacts on AMACONT as simple and efficient as possible for fundraisers.

  - Note: you can access this form through the Luminis Research Channel… it goes directly to the Proposal form in Banner…
Keep Proposals simple and manageable

AMAPROP – the Prospect Proposal form (need to be at Banner v8.0 or higher)
Keep Proposals simple and manageable

Let’s talk about the Proposals tab (top half) of the Banner form...

- Enter Proposal Code from the ATVPROP validation table; required
  - Suggest you keep it simple… Code 01 = Proposal #1, Code 02 = Proposal #2 ,etc.

- Tab past Sequence and Create Date, to Status field (or click in it with mouse)

- Enter Status from the ATVPRST validation table; required
  - Suggest only have 4 codes… P1 = Proposal in Development
    P2 = Proposal Presented
    P3 = Proposal Accepted
    P4 = Proposal Declined
Keep Proposals simple and manageable

AMAPROP – top half of form

- Status is used by the fundraiser to keep track of where they are with that Proposal for this Prospect
  - Status field is used in management tracking and reporting

- Tab to the Amount field; required
- Enter the total amount the proposal is being written for

- Tab to the Due Date field; optional (for now)
- This is when the fundraiser plans to deliver/present the Proposal to the Prospect.
  - Suggest staff not to worry about entering “Create Date” or “Status Date” at this time. Create Date will always be the date they started the Proposal; Status Date will change only when the Status field is updated. This is how we track how proposals are progressing in management-focused reporting…

- Tab to the Staff field; required
- Enter initials for the Advancement Officer doing the proposal; Save
Keep Proposals simple and manageable

Let's now review Projects (the bottom half) of the Banner form…

- Click with the mouse in the first field under Project (if try to use keyboard navigation, it will go to the Proposal Change History tab instead…)
- Pull down arrow icon to select a Project from ATVPROJ
  - Or, use Projects of Prospect List feature to pull from AMAINFO
  - If enter projects from ATVPROJ, pop-up will prompt user to add the projects on AMAINFO. This is an easy way to do so, so, let the system do it for you!
- Tab to Giving Vehicle, pull down to select from ATVGIVH
- Add as many projects as needed; Save
You may ask why we’re not using the rest of the fields in this block?

- I recommend this is all you really need in order to create a valid Proposal
  - There are various other tabs (such as the ability to see history of proposal and project changes, etc.
  - By keeping this as simple as possible, it minimizes data entry expectations on fundraisers
    - The level of detail chosen allows you to sufficiently track proposals and gather the data needed for management tracking and statistical reporting
    - There is no need to over-burden staff with additional data entry expectations on this form

When the proposal is presented, then, accepted or declined, return to this form and change the Status of Proposal from P1 to P2, then, to P3 or P4, as necessary. It is the fundraiser’s responsibility to do this!
Prospect Contacts – How to keep them simple and straightforward

It is the fundraisers’ responsibility to enter contacts by midnight each Sunday night for the prior week’s contacts...

Management reporting stats should then be scheduled to run in batch early a.m. each Monday.
How to Enter Contacts

AMACONT – the Prospect Contacts form in Banner...

Contact or Action

ID: +00266758  Mr. David T. Smittle
Spouse: +00288483  Mrs. Kim Ellen Smittle

Reference Number:
Proposal Sequence Number:

Proposal:
Originator:
Strategy:
Project:
Project 2:
Project 3:
Project 4:
Contact:
Description:
Call Report:
Move:
Assignee:
Action:
Action Date:

Ask Amount:
Ask Amount 2:
Ask Amount 3:
Ask Amount 4:
Contact Date:
Creation Date:

Create Message Automatically  Mark Message Confidential  Most Recent Message Status:  Messages Sent:
I’m going to show how to enter a contact via the Self-Service for Advancement Officers, Add a Contact form…

Almost every feature here is the same as how the form would be completed in the Banner form, but wanted to show how it works in Luminis and Self-Service…

With mouse, hover over the green plus sign, the bubble help will say, “Add a Contact”
### A “General Contact” is the Banner equivalent to form APACONT… use to enter a general comment, such as, “Jim called the office today to ask for the phone number of classmate Mike Brown, Class of 1985; Smittle provided.”

### A “Proposal Contact” is used to enter Contacts which pertain to a Proposal that is being developed, will be or has been presented, and any results which pertain to a proposal, such as it being accepted or declined. This is the Banner equivalent to form AMACONT. *Note: Be sure to have the Proposal created in Banner before you attempt to use Proposal Contacts in Luminis.*

### A “Non-Proposal Contact” is used to enter a Prospect Contact which does NOT pertain to a Proposal that has been developed, presented, accepted or declined. This is the Banner equivalent to form AMACONT.
Entering a Proposal Contact via Self-Service for Advancement Officers…

Add a Prospect Contact

To enter your call report, indicate the originator, contact date and whether or not this contact was associated with a existing proposal. If you have new information about the prospect (e.g. new address, phone number, etc), please email the Development Office.

Name: Busch, Charles Lawrence or ID: [Enter ID] Go

Advancement Individual Information

<table>
<thead>
<tr>
<th>Individual</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Mr. Charles Lawrence Busch</td>
<td>Mrs. Joyce Ann Busch</td>
</tr>
<tr>
<td>ID: +00273221</td>
<td>+00274214</td>
</tr>
<tr>
<td>Donor Categories: ALUM, FANS</td>
<td>ALUM</td>
</tr>
<tr>
<td>Preferred Class Year: 1963</td>
<td>1967</td>
</tr>
<tr>
<td>Preferred College: Engineering</td>
<td>Arts and Sciences</td>
</tr>
<tr>
<td>Prospect Status: 6-Temp. Stewardship/Just Gave</td>
<td>6-Temp. Stewardship/Just Gave</td>
</tr>
<tr>
<td>Primary Prospect Manager: Block, Kenneth W.</td>
<td>Block, Kenneth W.</td>
</tr>
</tbody>
</table>

- General Contact
- Proposal Contact
- Non-Proposal Contact

1.) Click on the radio button for Proposal Contact
2.) Click Go
Entering a Proposal Contact, con’t.

- Notice, a line will appear at the bottom of the screen…

Add a Prospect Contact

- To enter your call report, indicate the originator, contact date and whether or not this contact was associated with a current proposal. If you have new information about the prospect (e.g., new address, phone number, etc.), please email the Development Office.

Name: Busch, Charles Lawrence

or ID: 

Go

Advancement Individual Information

<table>
<thead>
<tr>
<th>Individual</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
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<tr>
<td>Preferred Class Year:</td>
<td>1963</td>
</tr>
<tr>
<td>Preferred College:</td>
<td>Engineering</td>
</tr>
<tr>
<td>Prospect Status:</td>
<td>6-Temp. Stewardship/Just Gave</td>
</tr>
<tr>
<td>Primary Prospect Manager:</td>
<td>Block, Kenneth W.</td>
</tr>
</tbody>
</table>

- Select the Proposal which pertains to this Contact…

- Pull down Proposal and Select the Proposal Number/Sequence Number for the Proposal with which this Contact should be associated; Click Go

Proposal: Proposal #1 - Sequence: 1

Go
The Contact form will now appear (need to scroll down in order to see the whole form…)

Note: Originator will default to login

New in Banner 8.5, now have the ability to add Additional Attendees on to the same Contact

Hold Ctrl. Key and click to select more than one…

Add a Prospect Contact

To enter your call report, indicate the originator, contact date and whether or not this contact is a prospect (e.g. new address, phone number, etc), please email the Development Office.

Name: Busch, Charles Lawrence or ID:  

<table>
<thead>
<tr>
<th>Name:</th>
<th>Mr. Charles Lawrence Busch</th>
<th>Mrs. Joyce Ann Busch</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID:</td>
<td>+00273221</td>
<td>+00274214</td>
</tr>
<tr>
<td>Donor Categories:</td>
<td>ALUM, FANS</td>
<td>ALUM</td>
</tr>
<tr>
<td>Preferred Class Year:</td>
<td>1963</td>
<td>1967</td>
</tr>
<tr>
<td>Preferred College:</td>
<td>Engineering</td>
<td>Arts and Sciences</td>
</tr>
<tr>
<td>Prospect Status:</td>
<td>6-Temp. Stewardship/Just Gave</td>
<td>6-Temp. Stewardship/Just Gave</td>
</tr>
<tr>
<td>Primary Prospect Manager:</td>
<td>Block, Kenneth W.</td>
<td>Block, Kenneth W.</td>
</tr>
</tbody>
</table>

Proposal: Proposal #1 - Sequence: 1

* - indicates a required field.

Add a Prospect Contact

Originator:*

Additional Attendees:
Enter the Proposal Contact, con’t.

- Change Contact Date, if necessary.
- Pull down Select and choose Project 1; required.
  - Do same for Project 2, 3, etc.
  - It remembers the project(s) for you…
- Ask Amount field
  - *Important! Suggest local rule to enter an Ask Amount ONLY if they ACTUALLY asked for THIS amount on THIS visit!*
Entering a Proposal Contact, con’t.

- **Contact Type; required**
  - See examples of codes on the next page…

- **Contact Description**
  - A short, “executive summary” style
  - 2 or 3 sentences…

- **Call Report**
  - A detailed full explanation!

- **Move Code**
  - See examples of codes on the next page…
Entering a Proposal Contact, con’t.

- Examples of Contact Type codes… (ATVSCNT)
  - PCI  Personal contact, sent e-mail
  - PCL  Personal contact, wrote letter
  - PCP  Personal contact, phone call
  - PCT  Personal contact, team visit
  - PCV  Personal contact, visit
  - TOC  Through office, incoming call
  - TOE  Through office, at cult. event
  - TOI  Through office, receivd e-mail
  - TOL  Through office, received ltr.
  - TOM  Through office, mass mailing
  - TOP  Through office, phonathon call
  - TOR  Through office, pl. card rec'd
  - TOT  Through office, met/visit here

- Examples of Move codes… (ATVMOVE)
  - CORR Correspondence
  - CVIS Campus Visit
  - PVIS Personal Visit
  - RESE Research
  - TELE Telephone Contact
Use of Tickler/Reminder System

- If desired, change Assignee (it will default to the user that is logged in…)

- Action
  - 180 character max.
  - “Tickler” message

- Action Date
  - In format MM/DD/YYYY

- Create Message
  - Important! Must remember to check the Create Message box before saving or the message will not be created!
Here’s an example of a properly completed Contact via S.S.A.O. (p. 1 of 2)

Proposal: Proposal #1 - Sequence: 1

- indicates a required field.

Add a Prospect Contact

**Originator:**
Smittle, David

**Additional Attendees:**
Abney, Melissa L.
Albrecht, Catherine A.
Alkire, Joshua C.

**Contact Date:** MM/DD/YYYY
01/29/2012

**Project 1:**
A-Mathile Center Cap./Plant

**Project 2:**
U-Annual Fund/Curr Oper, Univ.

**Project 3:**
Select

**Project 4:**
Select

**Contact Type:**
Personal contact, visit

**Contact Description:**
2000 character maximum
Smittle (testing) visited with Larry and discussed the possibility of his support of the Mathile Center, along with ongoing support of The Northern Fund.

**Call Report:**
Smittle visited with Larry and discussed the possibility of his support of the Mathile Center, along with ongoing support of The Northern Fund. Larry was very cordial during the visit and indicated he did have an interest in the sciences and, specifically, the new Mathile Center being constructed, since it is a facility to support the type of programming needed for today’s students. Next step will be for Smittle to show Larry the artist renderings of the building to gauge his level of interest.
Here's an example of a properly completed Contact via S.S.A.O. (p. 2 of 2)

**Call Report:**

Smittle visited with Larry and discussed the possibility of his support of the Mathile Center, along with ongoing support of The Northern Fund. Larry was very cordial during the visit and indicated he did have an interest in the sciences and, specifically, the new Mathile Center being constructed, since it is a facility to support the type of programming needed for today's students. Next step will be for Smittle to show Larry the artist renderings of the building to gauge his level of interest.

**Move Code:**

- Personal Visit

**Assignee:**

- Smittle, David

**Action:** 180 character maximum

- Schedule a visit Larry to present the proposal.

**Action Date:** MM/DD/YYYY

- 03/27/2012

**Confidential:**

- [ ]

**Action Status:**

- Pending

**Create Message:**

- [ ]

[Submit Contact]
And, here it is, after being saved, as shown in Banner!
Staff Training

How do we put these tools in the hands of our fundraisers?
How do we put these tools in the hands of fundraisers?

- Things to keep in mind when doing staff training
  - It has to be intuitive for them
  - Keep policies and procedures logical and consistent
  - Remember, their job is to raise money, not be over-burdened by data input requirements
  - You must set it up so it is easy for them to learn and use
    - Then, they will keep using it!
  - Create good training docs and save in a consistent location on network, Intranet or Google Drive. Explain things well and use screen shots.

Training docs which may be shared and customized for your staff training needs…
- Luminis Introduction for Advancement 060207.doc
- Setting User Preferences in Banner 060207.doc
- Prospect Management Data Entry Standards 120108.doc
- Luminis Enhancements to Advancement tab 010509.doc
- Proposals in Banner 8 and Project Interest Areas Training 091511.doc
How do we keep the data clean and reliable?

Data integrity is always important!
Needs for Data Integrity and How to Keep Data Clean...

- Here are sample prospect management clean-up scripts which may be shared to help ensure data integrity...

  - review_amainfo_for_bad_data.sql – Since we used the Ratings tab for other uses than just prospect ratings, this script runs weekly to ensure all Donor rating types have only valid Ratings associated with them.

  - fix_staff_assign_missing_primary_ind.sql – All prospect management records must have at least one staff assignment and it must be set to Primary (check mark) for Cultivation (CULT). Use this list to check mark one row as Primary.

  - fix_missing_target_ask_amt_date.sql – If Q-code in Status is 4 or 5, MUST have a Target Asking Amount and Date in Banner.

  - fix_wrong_project_status_code.sql – Projects in AMAINFO (Project and Interest Areas tab) should NOT have projects with a Status code of 0,1,2,3,4,5,6 or 7. The only valid Status codes on Projects are A for Active or I for Inactive. Replace any numerical Status on a Project with either an A or I for each of these ID’s.
Needs for Data Integrity and Keeping Data Clean for Reporting Purposes…

- Here are prospect management clean-up scripts we run via SQL weekly to ensure data integrity, cont’…
  - proposal_must_have_amt_and_due_date.sql – Proposals in Development or Presentation stage MUST have an Ask Amount and Due Date entered on AMAPROP

- Since we use the Status field on AMAPROP to track the progress of proposals, it is important for fundraisers to return to the form to change the Status field from P1 to P2 when the proposal is presented, then, from P2 to either P3 or P4 when the proposal has either been Accepted or Denied by the prospect
  - There is no good clean-up script for this… just constant reminders! 😊
Needs for Data Integrity and Keeping Data Clean for Reporting Purposes…

- For management reporting purposes, we worked out a process where gift records staff visit AMAPROP to connect a pledge or one-time gifts (not pledge payments!) which are the result of a proposal. This uses the Results tab on AMAPROP… *This then closes the loop and allows you to write reporting to predict what’s in your fundraising pipeline!*

![Proposed Gift or Pledge Process](image-url)
Needs for Data Integrity and Keeping Data Clean for Reporting Purposes…

- Notice I said we log only one-time gifts or pledge amounts in the Results tab on AMAPROP… *If you log “pledge payments” in Results, you would overstate the Values in the Total summary field.* We have created two clean-up scripts to help manage these tasks…

  - `proposal_results_missing_list_for_connie.sql` – If the Status on the Proposal form is P3 for Accepted, there should be a pledge number or gift number(s) of One-Time gift(s) entered on the Results tab. This finds records where Results need to be recorded

  - `proposal_results_not_pledge_payments_list_for_connie.sql` – If the Results tab has a Gift Number entered, that gift number must only be for a One-Time gift, NOT a pledge payment. This script finds pledge payments which have been entered by mistake. ONLY a Pledge Number or Gift Number(s) for One-Time gifts should be entered on the Results tab of AMAPROP

Keep the data clean and reliable
In this session, we reviewed the Banner Advancement module, Luminis Platform delivered Channels for Banner Advancement and Self-Service for Advancement Officers in order to see various ways to support fundraising staff.

Fundraisers can be given the task of managing their own prospects and proposals, so long as the data input needs are kept simple and straightforward.

Remember, there is no “cookie-cutter” or one best way to do this.

- You need to determine what are the best potential scenarios and solutions for your institution, go home and try things on your own!
- However, with data maintained in this suggested way, management reporting can be written to show aging of prospects/contacts (for staff performance evaluation purposes) and for predicting what’s in an institution’s fundraising pipeline of future giving potential! *(Especially, if you also have implemented the Planned Giving module robustly!)*
Q & A

What experiences can you share?
Your advice for others?
Gotchas?
Overall thoughts and comments?

Thank you!

smitte@sigcorp.com