



Navigation
Constituent View
Prospect Management
Gift Planning

TABLE OF CONTENTS

TAS Navigation	4
Logging In	4
Logging Out	4
Screen Components	5
Menu bar	5
Navigation bar	5
Explorer bar	6
Customize the Home Page	6
Application Search	7
Help Resources	8
Constituent Record Navigation	9
The Constituents Page	9
Constituent Types	9
Individuals	9
Organizations	10
Groups	10
Committees	10
Households	11
Constituent Search	11
Individual Constituents	12
Profile	13
Summary Tiles	14
Summary Tab	14
Contact Tab	16
Personal Info Tab	17
Relationships Tab	23
Revenue Tab	25
Memberships Tab	28
Documentation and Interactions Tab	31
Communications Tab	33
History Tab	36
OnBase Documentation Tab	36
Attributes Tab	37
Events Tab	37
Smart Fields Tab	38
OSU Employee Tab	38
Organization Constituents	40
The Organization Record	41
Corporate Info Tab	43

Table of Contents

Groups	45
The Group Record	46
Committees.....	46
The Committee Record.....	47
Households.....	49
Additional Constituent Record Information.....	50
The Explorer Bar	50
Bio Update Request.....	51
Requests to Add a New Constituent.....	53
Events54	
Event Record	56
Event Calendar	57
Analysis	58
Custom Unit Reports.....	58
Simple Reports	59
Recognition Credit.....	62
Recognition Credit Types.....	62
Prospect Management for Fundraisers.....	67
Lesson Objectives	67
Search for a Prospect.....	68
The Prospect Record.....	71
Plans Tab.....	74
Prospect Team Tab	74
Planned Gifts Tab	74
Funding Interests Tab.....	75
Prospect Manager History Tab	76
Attributes Tab.....	76
Navigation Tree.....	76
Wealth and Ratings	77
Fundraisers.....	83
View Fundraisers	83
The Fundraiser Record.....	84
Pending Steps Tab	84
Prospects and Plans Tab.....	84
Opportunities and Asks Tab.....	87
Requesting Prospect Assignment	88
Request Prospect Assignment for Non-Prospects	88
Requesting Assignment Transfers.....	92
Requesting Prospect Dismissal (Removing from portfolio)	92
The Prospect Plan Record	92
Add a Prospect Plan	94
The Opportunity Record.....	97
Add Opportunities	98
Edit Opportunities	100
Add Naming Opportunities.....	101
Plan Steps.....	101

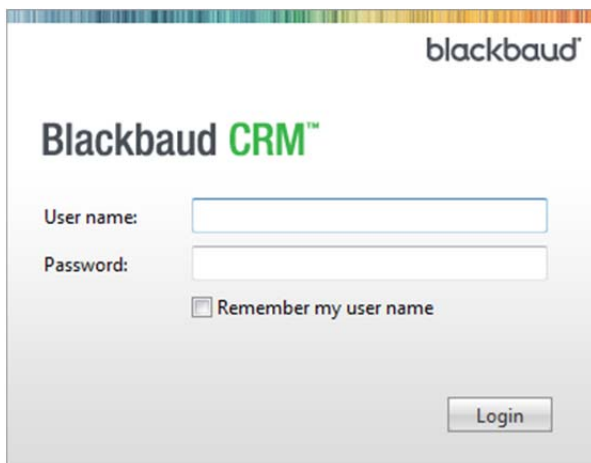
Add Steps.....	102
Edit Steps.....	104
File a Contact Report.....	105
Add Documentation	108
Summary	110
APPENDIX.....	111
TAS Prospect Management Definitions.....	111
Interactions Guidelines	115
Categories.....	118
Interactions for Prospects	118
Gift Planning.....	119
Lesson Objectives	119
Planned Gifts	120
View Planned Gifts	120
The Planned Gifts Tab	121
The Planned Gift Record	122
Planned Gift Details Tab	122
Planned Giving Relationships Tab.....	122
Beneficiaries Tab	123
Revenue Tab.....	123
Campaigns Tab.....	123
Additions Tab	123
OnBase Documentation Tab.....	125
Glossary of Gift Planning Terms.....	128

TAS NAVIGATION

The purpose of **The Advancement System (TAS)** is to manage the relationships and interactions The Ohio State University has with the individuals and organizations that support our mission and fundraising efforts. The program provides many features to help you navigate through, access, and share your information to help you raise money, steward donors, cultivate friends, and honor our alumni.

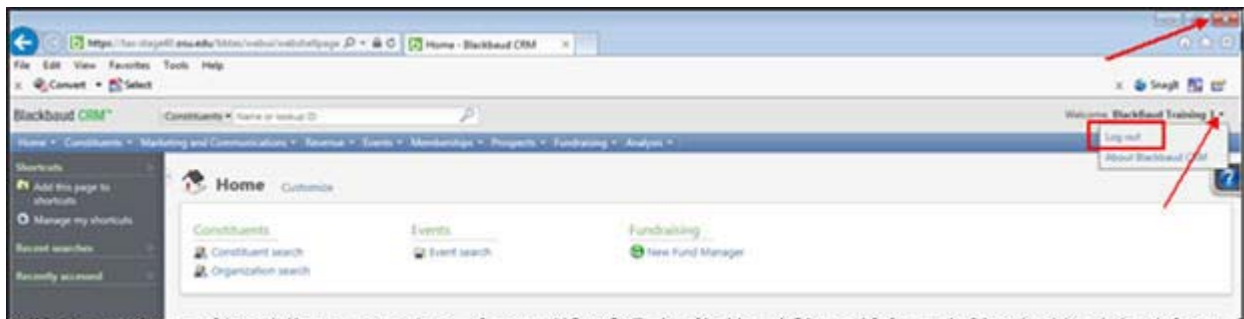
Logging In

To log in to **The Advancement System (TAS)**, you must confirm or enter your user name and password then click **OK** to log in. In TAS, your User name is your name. # and Password is your university password.

A screenshot of the Blackbaud CRM login interface. At the top right is the 'blackbaud' logo. Below it is the 'Blackbaud CRM' logo. The form contains two input fields: 'User name:' and 'Password:'. Below the password field is a checkbox labeled 'Remember my user name'. At the bottom right is a 'Login' button.

Logging Out

You can log out of TAS in one of two ways.

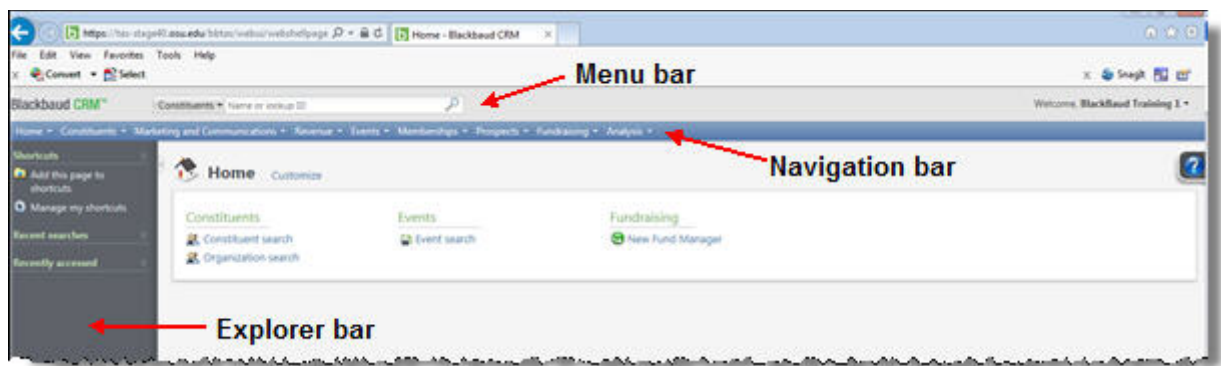


To Log Out of TAS:

1. Click the arrow next to your name in the header bar and then click **Log out**
OR
2. Click the **X** in the upper right corner of the browser window and close the browser.

Screen Components

Each area of the program share similar components to help you navigate through the system. These components include the menu bar, navigation bar, and explorer bar.



Menu bar

From the menu bar you can log out, access the help file, or search for a record or feature.

Navigation bar

The blue navigation bar displays icons that represent functional areas within the software. It allows you to navigate throughout the program, return to the Home page, and move forward and backward through the pages in your history.

The functional areas in **TAS** are:

- Constituents
- Marketing and Communications
- Revenue
- Events
- Memberships
- Prospects
- Fundraising
- Analysis

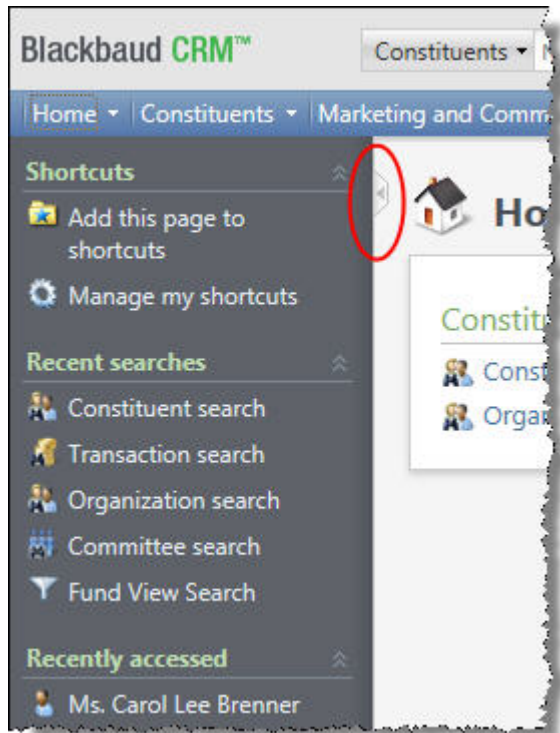
Access to each of these functional areas is determined by your system role. Names for the functional areas you have access to display on the Navigation bar

TAS Navigation

Explorer bar

The gray explorer bar displays shortcuts, recently performed searches and recently viewed records and pages. Depending on the current page, you can also access related tasks and activities.

You can expand or collapse the explorer bar based on your needs. Simply click the arrow that appears between the page and the explorer bar.

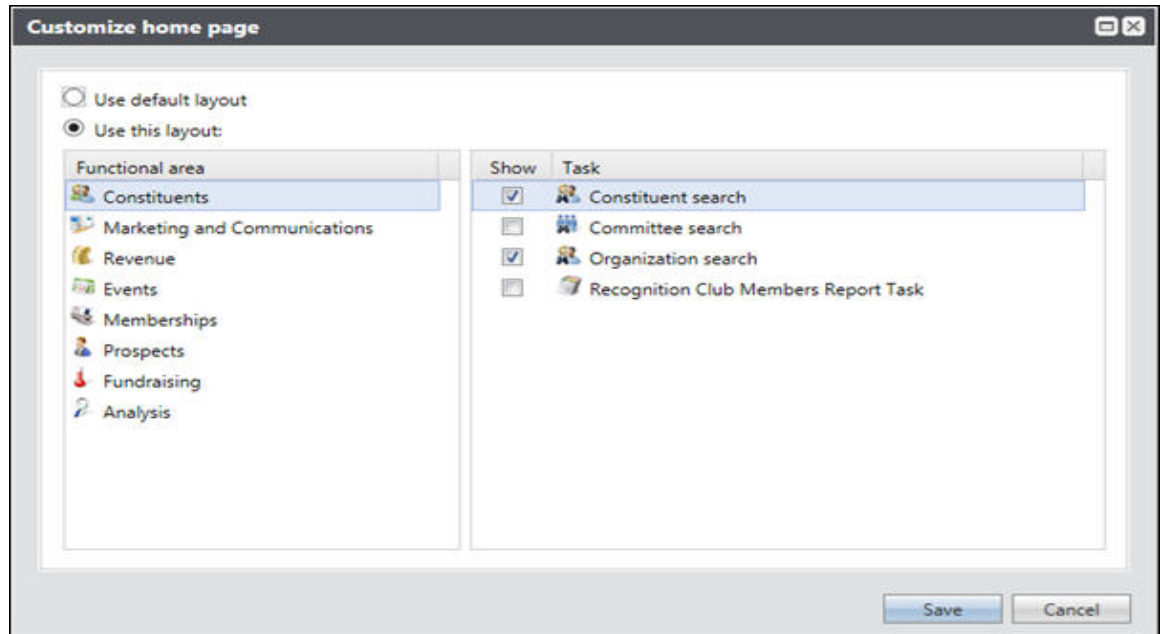


Customize the Home Page

Your Home page is the first page that displays when you start **TAS**. You can customize the default Home page to add and remove tasks.

NOTE:

- The list of available tasks may vary depending on your user role.



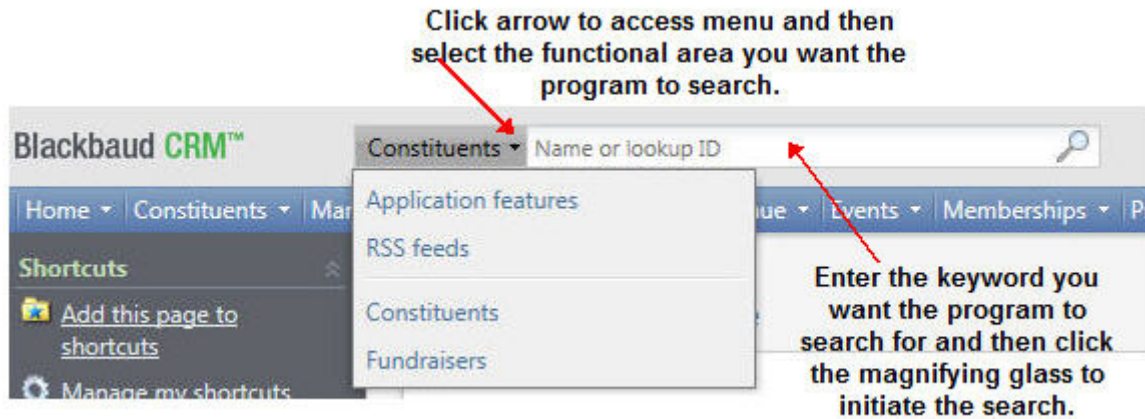
To Customize the Default Home Page:

1. On the navigation bar, click Home.
 2. At the top left corner of the Home page, click **Customize**.
 3. Click **Use this layout**.
 4. In the Functional Areas frame, select a functional area. The tasks for the area display in the Tasks frame.
 5. In the Tasks frame, mark the **Show** checkbox for the tasks to include on the Home page.
 6. Click **Save**. The Home page automatically refreshes to display your selections.
-

Application Search

You can use the application search function to find a specific feature or a record. The top of any application page displays a **Find** field and a menu of search options.

TAS Navigation




To Perform a Search:

1. Enter your search criteria in the **Find** field.
 2. Click the search type on the Search menu.
 3. Click the magnifying glass to perform the search.
 4. In the search results, click the item you want to open.
-

Help Resources

As you continue to learn the program, you can access these resources when you need help.

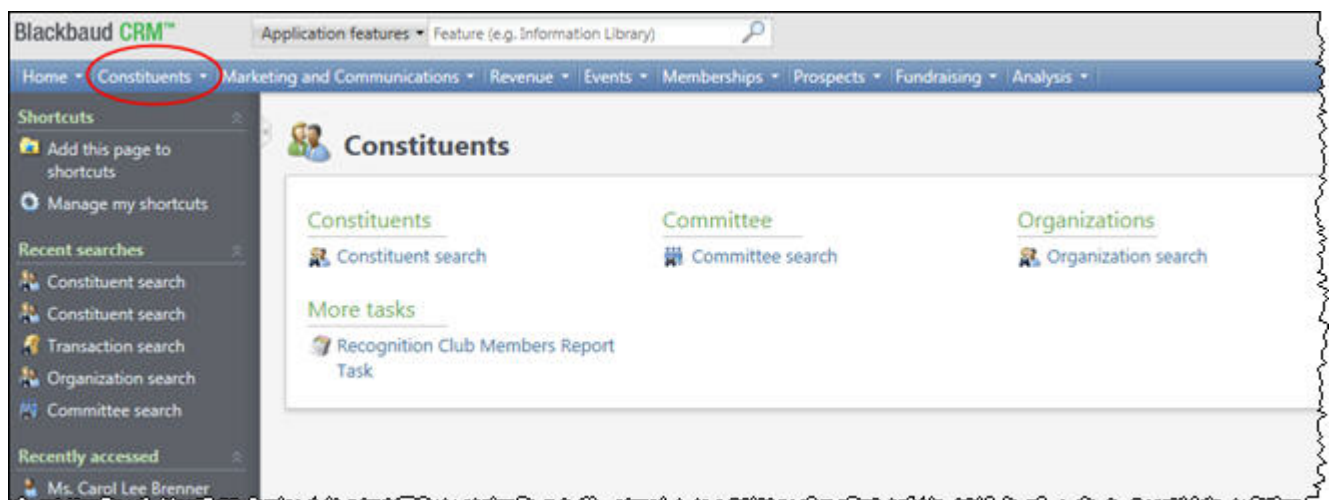
Resource	Location
Help Files within TAS program	Available from within the program: Go to the program page or open a program task window then click the Help icon  on that window or page.
OSU Online Resources	2tech@osu.edu
Advancement IT Service Desk	292-TECH(8324)

CONSTITUENT RECORD NAVIGATION

Constituents are individuals, groups, businesses, and other organizations that support The Ohio State University by contributing money, time, and/or resources. The purpose of **The Advancement System (TAS)** is to manage the relationships and interactions you have with the individuals and organizations that support your mission and fundraising efforts.

The Constituents Page

On the **Constituents** page, you can access constituent records.



Constituent Types

Constituents are the individuals, groups, and organizations who support your mission and fundraising efforts. Each constituent has its own constituent record in **TAS**. You manage information about each constituent on their constituent record.

Individuals

Individuals are the people, such as donors who support The Ohio State University's mission or interact with The Ohio State University in other ways.

i At Ohio State you will use individual records to track:

Constituent Record Navigation

- Individual donors and prospects
- Individual event registrants
- Individual corporate contacts
- Alumni
- Students
- Parents
- Employees
- Board members

Organizations

Organizations are entities, such as companies and businesses that support The Ohio State University's mission or interact with OSU in other ways.

i At Ohio State you will use organization records to track:

- Companies
- Businesses
- Foundations
- Estates/Trusts
- Legislative bodies
- Agencies

Groups

You may find it important to track certain groups of constituents. Using a Group record, you can add a group constituent record to the database, show the constituents who belong to the group, and enter information about the group and its members. This helps you track individuals and organizations that you deem important enough to group together for managing and reporting purposes.

i At OSU, you will use groups to track:

- Boards and committees
- Prospect groups

Committees

Committees are a specific type of group that can be enabled with additional privileges. Committees can plan events, set fundraising goals (financial), and set committee goals (non-financial).

i At Ohio State you will use committee records to track:

- OSU boards and committees
 - Alumni Board/Committee
 - Campaign/Development Board/Committee
 - Unit Advisory

Constituent Record Navigation

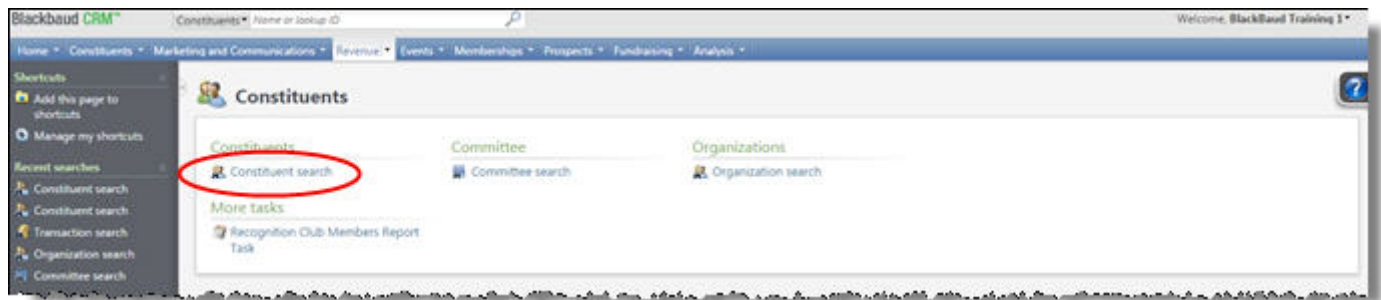
- Other Campaign/Committee
 - Sub-committees for boards

Households

Ohio State defines a household to be a husband and wife or partners living at the same address. OSU will use household records exclusively to manage mailings for married couples or partners.

Constituent Search

You use the search window to find the constituent's record that you want to view.

A screenshot of the 'OSU Constituent By Name Or Lookup Id Search' window. The window contains various search fields and options. Annotations are placed as follows: 'A' is a box around the 'Name/Lookup ID' field; 'B' is a box around the 'Search in:' dropdown menu; 'C' is a box around the 'Search' and 'Clear' buttons; and 'D' is a box around the 'Results' table header. The search fields include: Name/Lookup ID, Last/Org name, First name, Middle name, Lookup ID, Primary business, Email address, Constituency, Country, Address, City, State, ZIP/Postal code, Phone number, Primary class year, Any Class year - From, Any Class year - To, College, Department, Status, and a checkbox for 'Match all criteria exactly'. The 'Advanced search options' section includes checkboxes for 'Check nickname', 'Check aliases', 'Check alternate lookup IDs', 'Check merged constituents', 'Only search primary addresses', 'Include deceased', 'Include inactive', and 'Include fuzzy search on name'. The 'Results' table has columns: Lookup ID, Name, Constituent..., Address, City, State, ZIP/Postal c..., Country, Primary clas..., Primary bus..., Email addre..., Middle name, Suffix, and Pho... (partially visible).

- A. Enter constituent name or other known information in data fields. The search process is not case sensitive. You can use "wildcard" characters to take the place of part of your search phrase:

Constituent Record Navigation

- Asterisk (*) or percent sign (%) takes the place of one or more characters
- Question mark (?) or underscore (_) takes the place of an individual character

For example, to locate all constituents with a last name ending with the letters “son,” you can enter ***son** or **%son** in the last name field, or for the last name Smith or Smyth, you can enter **Sm?th** or **Sm_th**.

- B. Advanced search options allows you to specify the type of record that you are searching for. You can select to include individuals, organizations, and groups/households records in your search. You can select one, two, or all three checkboxes.

You can choose to include records that are marked as **deceased**. **Records that are marked as deceased will not display in your search results unless you check the box to Include deceased.**

You can choose to search using a nickname, search by an alias, check alternate lookup IDs and search only for primary addresses.

The option to include a fuzzy search name means that the results will include names that sound similar to the one entered in the name field. For example, if you know someone’s last name is Pederson, Peterson, or Patterson, you could include any of those in the last name field and click on the fuzzy search box.

Advanced search options are “sticky” which means that once you have selected a checkbox or removed the check mark from a checkbox, that selection will remain in place for every search until you change it.

- C. Click **Search** to activate the search once you have entered criteria or you may tap the Enter key on your keyboard. Click **Clear** to remove all criteria and begin a new search.
- D. All results that meet your search criteria display in the grid at the bottom of the window. Click the constituent name in the results to open the constituent’s record. (Alternately, click the row of the constituent you wish to open and click **Select**.)

For searches returning more than 100 constituents, only the first 100 appear in the results grid. You must refine your search in some manner to display additional results.

To Search for a Constituent Record:

1. On the navigation bar, click **Constituents**.
 2. On the **Constituents** page, click **Constituent Search**.
 3. Enter the constituent name or other known information in the data fields.
 4. Select checkboxes for any advanced search options your wish to use.
 5. Click **Search** to begin the search.
 6. Click the constituent name in the results to open the constituent’s record.
(Alternately, click the row of the constituent you wish to open and click **Select**.)
-

Individual Constituents

Constituent Record Navigation

An individual record is comprised of three main sections: a profile section at the top of the record, multiple tabs beneath the profile and links on the explorer bar.

The screenshot shows the Blackbaud CRM interface for a constituent record. The top navigation bar includes links for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Projects, Fundraising, and Analysis. The left sidebar contains sections for Tasks, More Information, Reports, and Shortcuts. The main content area is titled 'Mr. Brutus Buckeye' and includes a 'Profile' section with personal information, contact information, addresses, primary relationships, documentation and interactions, and memberships. Below the profile section is a 'Tabs' section with various tabs including Summary, Contact, Personal Info, Relationships, Revenue, Online Info, Memberships, Prospect, Education, Documentation and Interactions, Communications, History, and Online Documents. The Revenue tab is currently selected, showing a revenue summary table.

Revenue summary		View all revenue	
Total revenue:	\$1,621,222.47	12/2/2014	Donation \$316.00
Total household revenue:	\$1,631,222.47	11/17/2014	Donation \$158.00

Profile

Profile information about the constituent displays at the top of the record including the type of record, Lookup ID, and any active constituencies. Summary tiles display information about the constituent depending on the type of constituent. For individual constituents, personal information, contact information, addresses, primary relationships, documentation and interactions, memberships, and education.

The screenshot shows the Blackbaud CRM interface for a constituent record. The top navigation bar includes links for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Projects, Fundraising, and Analysis. The left sidebar contains sections for Tasks, More Information, Reports, and Shortcuts. The main content area is titled 'Mr. Brutus Buckeye' and includes a 'Profile' section with personal information, contact information, addresses, primary relationships, documentation and interactions, and memberships. Below the profile section is a 'Tabs' section with various tabs including Summary, Contact, Personal Info, Relationships, Revenue, Online Info, Memberships, Prospect, Education, Documentation and Interactions, Communications, History, and Online Documents. The Revenue tab is currently selected, showing a revenue summary table.

Revenue summary		View all revenue	
Total revenue:	\$1,621,222.47	12/2/2014	Donation \$316.00
Total household revenue:	\$1,631,222.47	11/17/2014	Donation \$158.00

Constituent Record Navigation





Summary Tiles

Summary tiles are located in the profile section of a constituent's record. They allow you to quickly view, add, and edit information. Summary tiles link to other pages and tabs. You can use these links as shortcuts to navigate throughout the constituent's record.



You can customize which summary tiles appear and in what order you want them to appear for each record type.

To Customize tiles on a Constituent Record:

1. On the constituent's record, click **Customize tiles**.
 2. **Customize individual constituent summary tiles** window opens displaying the names of all of the summary tiles.
 3. Highlight the tiles that you want to display to the **Show these tiles in this order:** section on the right side of the window by clicking on the  and  arrows.
 4. Highlight the tiles to move them into the order that you want them to display using the  and  arrows.
 5. Click **Save**.
 6. Repeat these steps if the tiles are not in the order that you want or tiles are showing/not showing that you want.
-

Summary Tab

The Summary tab displays an overview of an individual constituent including the recent revenue, activities, and communications associated with the constituent.

Constituent Record Navigation

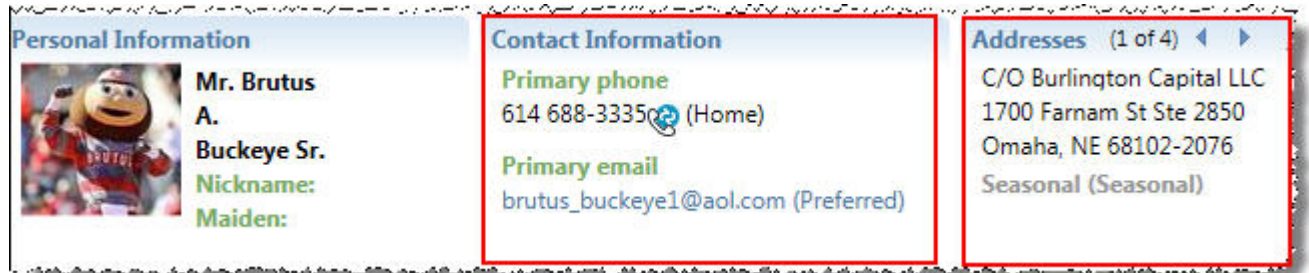
Summary	Contact	Personal	Relationships	Constituencies	Education	Documentation	Names	Attributes	Smart Fields	Tributes
Revenue summary			View all revenue		Recent revenue					
Total revenue:				\$1,580,648.47	10/2/2012	Donation			\$280.00	
Total household revenue:				\$1,590,648.47	8/14/2012	Donation			\$500.00	
Membership revenue:				\$0.00	8/7/2012	Event registration payment			\$64.00	
Event revenue:				\$128.00	8/7/2012	Event registration payment			\$64.00	
					4/24/2012	Donation			\$0.00	
					1/23/2012	Pledge payment			\$5,000.00	
					7/27/2011	Pledge payment			\$10,000.00	
					4/18/2011	Pledge			\$25,000.00	
					2/23/2011	Pledge payment			\$5,000.00	
					12/15/2009	Donation			\$10,000.00	
Recent and upcoming activities					Recent and upcoming communications			View all		
11/3/2012	Event registration	FCOB-Illinois Pre-Game-11/3/2012			10/3/2012	Receipt	GIK Receipts			
10/20/2012	Event registration	FCOB-Purdue Pre-Game-10/20/2012			9/27/2012	Online Confirmation	ADV_High_Points_Sept_2012			
10/6/2012	Event registration	FCOB-Nebraska Pre-Game-10/6/2012			9/21/2012	General Correspondence	DEV_PC Brunch invite			
8/24/2012	Interaction	Letter			9/18/2012	Online Confirmation	DEV_PC Pre-Game Brunch 2012			
6/26/2012	Plan step	Personally Scheduled Visit			9/13/2012	Online Confirmation	Connect - September 2012 - Not Ohio			
5/25/2012	Interaction	Letter			9/5/2012	General Correspondence	DEV_DR - Neil Legacy Society - Mail			
4/26/2012	Interaction	Personally Scheduled Visit			8/31/2012	Online Confirmation	DEV_PC eNews September 2012 FINAL			
4/26/2012	Interaction	Event			8/24/2012	Acknowledgement	OAA Air Force ROTC Letters - OAA Air Force ROTC Letter			
3/29/2012	Interaction	Personally Scheduled Visit			8/15/2012	Online Confirmation	Connect - August 2012 - Not Ohio			
3/29/2012	Interaction	Personally Scheduled Visit			8/15/2012	Receipt	General Receipts			

Frame	Information
Revenue summary	This frame displays information about the total giving received from the constituent. If the constituent is a member of a household, you can also view the total giving received from the household. To view all revenue for the constituent, click View all revenue on the action bar.
Recent revenue	This frame displays the most recent revenue transactions received from the individual.
Recent and upcoming activities	This frame displays the most recent or pending interactions or activities such as event registrations associated with the constituent.
Recent and upcoming communications	This frame displays the most recent communications associated with the individual. To view all communication with the constituent, click View all on the action bar.

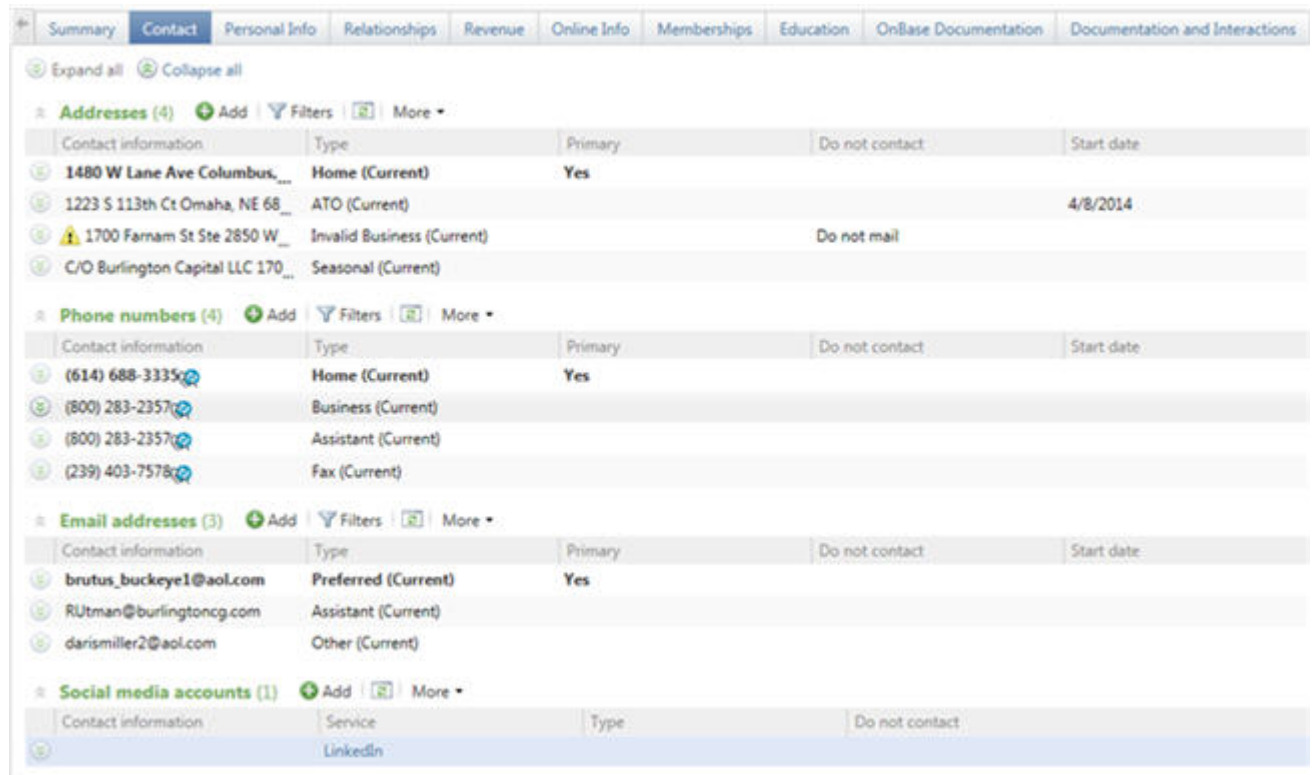
Constituent Record Navigation

Contact Tab

You can access the Contact tab by clicking on either the Contact Information or Addresses summary tile in the profile section or clicking on the Contact tab.



On the Contact tab of a constituent record, you can view the constituent's addresses, phone numbers, email addresses, and social media accounts.

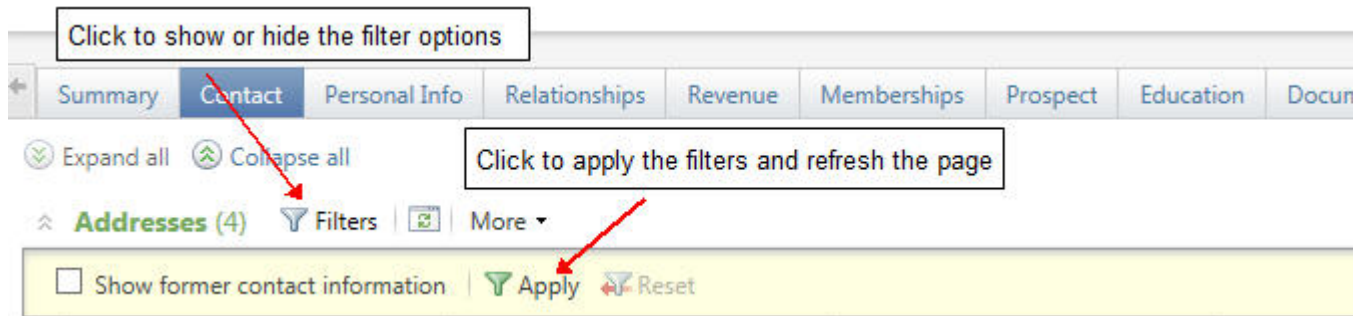


You cannot edit information on a Constituent's record. However, you should submit address, email and telephone changes to the Advancement Records department by clicking on the Bio Update Request link on the Explorer bar. (see page 51)

Constituent Record Navigation

Filters and Refreshing the Data

When you view information on the constituent tabs, you may have the option to filter the data to view only the information you want to see.



❗ When you are viewing a record and you think there is information missing from a tab or page that has filter capability, be sure to set filters to display all information and refresh the page data to see all the data for the record.

Personal Info Tab

You can access the Personal Info tab by clicking on the Personal Information summary tile in the profile section.



Two sub tabs are available from the Personal Info tab: **Personal** and **Constituencies**. Each sub tab contains information about the constituent.

Personal

The following types of personal data is listed on the Personal sub tab:

- **Personal information** - includes nickname, marital status, gender, maiden name, birth date, and age
- **Name formats** – view multiple addressees and salutations to use in communications with a constituent. A primary addressee and primary salutation is identified. The primary addressee is how

Constituent Record Navigation

the constituent request to typically by addressed, such as on envelopes and labels. The primary salutation is how the constituent requests to typically be greeted in communication.

- **Aliases** – the aliases for the constituent. You can search for constituent records by Aliases on the Constituent Search screen by checking the box for Advanced Search options to Check Aliases
 - For an individual constituent, an alias can be a former name, an alternate name, or a nickname not listed under personal information.
 - On an organization record, an alias can be an acronym or a name by which the organization is commonly called in the community.
- **Alternate lookup IDs** – ID numbers from other OSU database systems that can be used to locate a constituent in **TAS**. You may see:
 - Alumni Association membership
 - Athletics ticket
 - Name.#
 - OSU ID
 - Peletonia rider #
 - WOSU membership number
 - WCA (Wexner Center for the Arts)
- **Event restrictions** – restrictions such as accessibility accommodations, food allergies or meal restrictions that were self-disclosed by the constituent during event registration can be stored on the constituents record

Constituent Record Navigation

Summary Contact **Personal Info** Relationships Revenue Memberships Prospect Education Documentation and Interactions Communications History OnBase Documentation Online

Personal Constituents

Expand all Collapse all

Personal information

First name: Brutus
 Middle name:
 Last name: Buckeye
 Title: Mr. Title 2: Mr.
 Suffix: Suffix 2:
 Nickname: Gender: Male
 Marital status: Married Maiden name:
 Birth date: 3/15/1936 Gives anonymously: No
 Age: 79 Website:

Name formats (10) Filters: More

Name	Type	Primary addressee	Primary salutation	Site
Mr. Brutus Buckeye and Ms. Becky...	Joint Professional Addressee			All sites
Mr. Buckeye	Individual Formal Salutation		✓	All sites
Brutus	Individual Casual Salutation			All sites
Mr. and Mrs. Buckeye	Joint Formal Salutation			All sites
Mr. Brutus Buckeye	Individual Professional Addressee			All sites
Brutus Buckeye	Individual Casual Addressee			All sites
Mr. Brutus Buckeye	Individual Formal Addressee	✓		All sites
Mr. and Mrs. Brutus Buckeye	Joint Formal Addressee			All sites
Brutus and Becky	Joint Casual Salutation			All sites
Becky and Brutus Buckeye	Joint Casual Addressee			All sites

Aliases (2) More

Name	Type
David A Rismiller	Historical
Mr. Mr. David A. Rismiller Sr.	Historical

Alternate lookup IDs (4) More

Type	Lookup ID
Alumni Association	000041848
Athletics	2435874
CETS	64453
LexID	002153269217

Event restrictions (0) More

Restriction type	Option
------------------	--------

- **Deceased information** - for constituent records marked as deceased, the Deceased information heading displays. Under Deceased information heading, information includes the date the constituent passed away and how OSU learned that the constituent passed away.

Constituent Record Navigation

Notifications: "Gift TLC", "Prospect Manager: Pamela Loun", and "Special attn from pres - PCAB". Click here for more information.

Individual Lookup ID: 00051913 **Deceased**

Constituencies: OSUAA Alumni Alumnus Event registrant Major donor Planned giver Prospect Recognized donor

Show more

Summary Contact **Personal Info** Relationships Revenue Memberships Prospect Education Documentation and Interactions Communications History Online Documentation Online

Personal Constituencies

Expand all Collapse all

Personal information [X]

First name: James
Middle name: Frederick
Last name: Sipp
Title: Mr.
Suffix: Title 2: Mr.
Nickname: Jim Suffix 2:
Marital status: Deceased Gender: Male
Birth date: 4/24/1937 Maiden name:
Gives anonymously: No
Website:

Name formats (5) Filters More

Name	Type	Primary address	Primary salutation	Site
Mr. Sipp	Individual Formal Salutation			All sites
Mr. James F. Sipp	Individual Formal Addressee	✓	✓	All sites
Jim Sipp	Individual Casual Addressee			All sites
Mr. James F. Sipp	Individual Professional Addressee			All sites
Jim	Individual Casual Salutation			All sites

Aliases (4) More

Name	Type
James F Sipp	Historical
James Frederick Sipp	Historical
James Fredrick Sipp	Historical
Mr. Mr. James Frederick Sipp	Historical

Deceased information Go to deceased options [X]

Deceased date: 7/8/2011 Source:
Confirmation: Unconfirmed

Alternate lookup IDs (2) More

Type	Lookup ID
Alumni Association	0000406801
LeID	002348601805

Event restrictions (0) More

Restriction type	Option
------------------	--------

Constituencies

Constituencies define the affiliations your constituents have with The Ohio State University. A constituent can have multiple constituencies, and these relationships can start, end, and overlap.

For example, a constituent may first become a donor in your database and remain a donor for an undetermined length of time. The constituent may later become a committee member for OSU, but for only one year.

You can use constituencies to define these relationships and group similar constituents in queries, mailings, and reports.

An individual's constituencies display on the Personal info tab. Active constituencies also display in the profile summary at the top of a constituent's record.

Constituent Record Navigation

The screenshot shows the profile of Mr. Brutus Buckeye. At the top, there are notifications and a red circle highlights the 'Constituencies' link in the navigation bar. Below this, a table lists various constituency codes and their effective dates.

Description	Date from	Date to
OSUAA Alumni		
Alumnus	6/1/1958	
Committee member		
Donor	6/18/1958	
Event registrant	8/22/2011	
Loyal donor		
Major donor		
Member	7/3/2003	12/31/2050
Planned giver	7/5/2000	
Prospect		
Recognized donor	5/1/1996	12/31/2007

This table lists the current constituency codes and when each is used.

Constituency Value	Description
Alumnus	Graduate of The Ohio State University
OSUAA Alumni	Graduates of OSU and those who attended but did not graduate but completed at least 15 credit hours and have requested to be included in alumni activities and events.
OSU Student	Currently enrolled OSU students.
OSU Former Student	Students who have withdrawn.
OSU Parent	Parents/guardians of OSU alumni and students. Whether a parent is a past or current parent can be determined by querying on the related child's education record.
OSU Employee	Individuals currently employed by the university or faculty with emeritus status.

Constituent Record Navigation

Constituency Value	Description
Medical Residency Grad	Individuals who have completed a medical residency, fellowship or non-accredited medical training program at Ohio State.
Dental Residency Grad	Individuals who have completed a dental residency at Ohio State.
Loyal donor	Constituent has donated to OSU for the past five consecutive years
Corporate Foundation	For foundations associated with a corporation or business, generally serving as the charitable or philanthropic arm of the company, i.e., Cardinal Health Foundation.
Major donor	Constituent has donated over \$50,000 to OSU
Family Foundation	A foundation created by a family and funded by family members for the purpose of making charitable distributions.
Other Foundation	An independent foundation or one not affiliated with a corporation or family.
Trust	Legal entity used for estate planning or making charitable gifts.
Educational Institution	Schools, colleges and universities.
Donor-Advised Fund	Third-party charitable giving vehicle.
Government	Local, state or federal government entity.

Relationships Tab

Relationships are familial, social, or professional associations with the constituent. A relation must have its own constituent record in the database. When you add a relationship to a constituent record, the relationship displays on the Relationships tab of both constituents in the relationship.

You can access the Relationships tab by clicking on the Primary Relationships summary tile in the profile section.



Five sub tabs are available from the Relationships tab: **Relationships**, **Group Member**, **Relationship Tree**, **Extended Relationships** and **Committee**. Each sub tab contains information about the constituent.

Relationships

Relationships are grouped by Individual and Organization.

Name	Constituent type	Type	Relationship	Start date	End date
Individual					
Ms. Becky Buckeye	Individual	Spouse	Spouse		
Mr. Brutus Buckeye Jr.	Individual		Child		
Ms. Cynthia Buckeye Hedican	Individual		Child		
Organization					
Burlington Capital LLC	Organization		Former Employer	1/1/1870	
Firstier Charitable Foundation	Organization	Contact	Matching Gift Entity	6/12/2013	
Firstier Financial Inc.	Organization	Contact	Former Employer	1/1/1870	

Name	Job title	Job category	Career level	Schedule	Department	Division	Start date	End date	Responsibilities	Is private
Firstier Charitabl...	Chairman, Presi...									No
Firstier Financial...	Ret/Chrm/Pres/...	Retired - 015	Retired							No

Individual Relationships

Individual relationships are the people with whom the constituent is associated, such as a spouse, partner, friend, family member, or business associate.

Organization Relationships

Organization relationships are the businesses, foundations, agencies, and other organizations that have an association with the constituent. For example, a constituent can be a member of cultural organization, an employee of a business, or a board member of an organization.

Constituent Record Navigation

Employment History

A constituent's Employment History tab tracks employment history for constituents, which includes job title, job category, and career level information. For organization constituents, it offers a view of all employees, past and present. For individual constituents, it offers a work history.

Group Member

The constituent's current group memberships and previous group memberships are displayed. The group's name and the group type is indicated for each group.

Summary

Contact

Personal Info

Relationships

Revenue

Online Info

Memberships

Education

OnBase Documentation

Documentation and Interactions

Comm

Relationships

Relationship Tree

Extended Relationships

Group Member

Committees

Current group memberships (6)

More ▾

Group	Group type	Group constituencies	Member is primary contact	Roles
Ms. and Mr. Becky Buckeye	Household			
Rumiller, David & Anne - Prospect Group	Prospect Group	Prospect	<div></div>	
FCOB-BFOS Campaign Committee	VOL: Campaign/Development	Committee		
FCOB-Dean's Advisory Council	VOL: Unit Advisory	Committee		
OSU Foundation Board	VOL: Board	Committee		Elected Member: Term 4; Term 3; Term 2; Term 1
OSU Foundation Board Donor Relations Committee	VOL: Board	Committee		

Previous group memberships (2)

More ▾

Group	Group type	Member from	Member to	Comments	Roles
<div></div> Rumiller, David A. Sr. & Anne St...	Stewardship		1/16/2015		
<div></div> Presidential Transition Communi...	VOL: Other		1/1/1870		

Relationship Tree

The Relationship Tree tab displays all of the constituent's relationships entered on the Relationships tab. You can view each relationship entered for the constituent or view all relationships for each entry in the relationship tree by expanding the tree view.

Summary	Contact	Personal Info	Relationships	Revenue	Online Info	Memberships
Relationships	Relationship Tree	Extended Relationships	Group Member	Committees		

Relationship tree

Brutus Buckeye

Ms. Becky Buckeye - Spouse

Mr. Brutus Buckeye Jr. - Child

Ms. Cynthia Buckeye Hedican - Child

Firstier Financial Inc - Former Employer








Burlington Capital LLC - Former Employer

Firstier Charitable Foundation - Matching Gift Entity

Constituent Record Navigation








Extended Relationships

The Extended Relationships tab displays all relationships identified by **Wealth Point** for an individual constituent, constituent group, or households.

Summary	Contact	Personal Info	Relationships	Revenue	Online Info	Memberships	Education	OnBase D
Relationships	Relationship Tree	Extended Relationships	Group Member	Committees				
Extended relationships (423)    More ▾								
Organization	Match name	Relationship's name	Job title	Lookup ID				
 American Royal Association	Brutus Buckeye		Director					
 Joslyn Art Museum Foundation of Wyomi...	Brutus Buckeye		Treasurer					
 Joslyn Museum Shop	Brutus Buckeye		Director					
 The Ohio State University	Brutus Buckeye		Board Of Directors	90000750				

Committees

The committees that the constituent is a member of are displayed.

Summary	Contact	Personal Info	Relationships	Revenue	Online Info	Memberships
Relationships	Relationship Tree	Extended Relationships	Group Member	Committees		
Committees and roles (9)    More ▾						
Name	Start date	End date	Comments			
 FCOB-BFOS Campaign Committee						
 FCOB-Dean's Advisory Council						
 OSU Foundation Board	11/1/2002					
 OSU Foundation Board Donor Relations Commi...	10/1/2014					

Revenue Tab

The Revenue tab displays information about revenue associated with the constituent, such as gifts, recognition credits, matched gifts, and planned gifts.

The Revenue information is tracked on multiple tabs.

Constituent Record Navigation

Revenue filter: Gifts Sites: All sites

Breakdown: Calendar year Date range: Last calendar year

Campaigns: All campaigns Start date: 1/1/2014 End date: 12/31/2014

Individual summary	
Total revenue:	\$17,974.00
Total number:	5
Total years with revenue:	1
Consecutive years with revenue:	2014 (1 year)
First:	\$11,500.00 Payment on 7/16/2014
Last:	\$316.00 Payment on 12/2/2014

Household summary	
Total revenue:	\$17,974.00
Total number:	5
Total years with revenue:	1
Consecutive years with revenue:	2014-01-01T00:00:00 (1 year)
First:	\$11,500.00 Payment on 7/16/2014
Last:	\$316.00 Payment on 12/2/2014

Individual and household revenue by year					
Year	Total revenue	Total number	Year	Total revenue	Total number
2014	\$17,974.00	5	2014	\$17,974.00	5

The following table provides a summary of the information available on each of the sub tabs.

Tab name	Information
Revenue Summary	<p>The Revenue Summary tab displays a cumulative summary of the constituent's revenue.</p> <p>For an individual constituent associated with a household, it displays the total giving balance for the individual (left side of the tab) and for any household to which the constituent belongs (right side of tab).</p> <p>For a constituent household, it displays the total revenue for the household members.</p>
Revenue History	<p>The Revenue History tab displays a summary of all revenue items OSU received from the constituent, such as gifts, pledge payments, and event registration fees. Revenue detail information for the selected payment is shown at the bottom of the tab.</p> <p>From the tab, you can view the record of a transaction associated with the constituent. Select the transaction to view and click Go to revenue. The selected revenue record displays.</p>

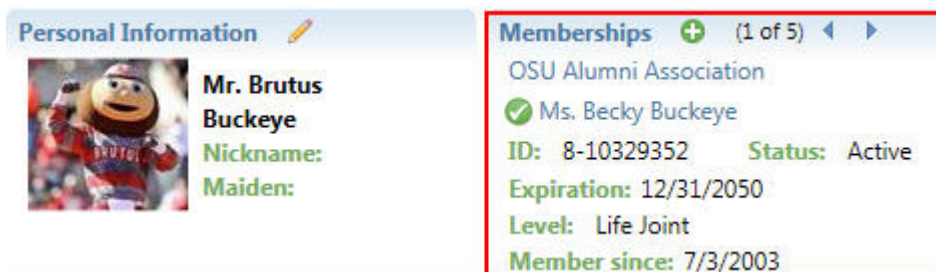
Constituent Record Navigation

Tab name	Information
Recognition	<p>The Recognition tab displays the recognitions the constituent has achieved. For each recognition, you can view its program name, status, expiration date, join date, achievement date, and total annual giving. You can also view how long the constituent has been a member of the program and the amount to donate to achieve the next level.</p> <p>With naming opportunities, OSU can allow donors to place their name on a physical object, such as naming bricks in a sidewalk or a plaque on a building, for specific donation amounts.</p> <p>Named Recognition History provides a history of the naming opportunities associated with the constituent.</p> <p>With recognition defaults, the program assigns recognition credits to a constituent's spouse or partner when OSU receives a donation from them.</p> <p>Recognition Defaults displays the recognition credit defaults for a constituent.</p>
Recognition History	<p>The Recognition History tab displays the history of the recognition credits associated with the constituent's gifts to OSU. This tab displays the date, type, amounts, recognition type, designation, and the donor associated with each recognition credit.</p>
Planned Gifts	<p>The Planned Gifts tab displays any planned gifts added for the constituent from his or her prospect record or prospect plan. Only planned gifts with a status of accepted or matured will display on this tab.</p>
Matched Gifts	<p>The Matched Gifts tab displays any matched gifts for the constituent from his or her employer or other affiliated business.</p>
Tributes	<p>The Tributes tab displays any monetary tributes to which a constituent is connected.</p>

Constituent Record Navigation

Memberships Tab

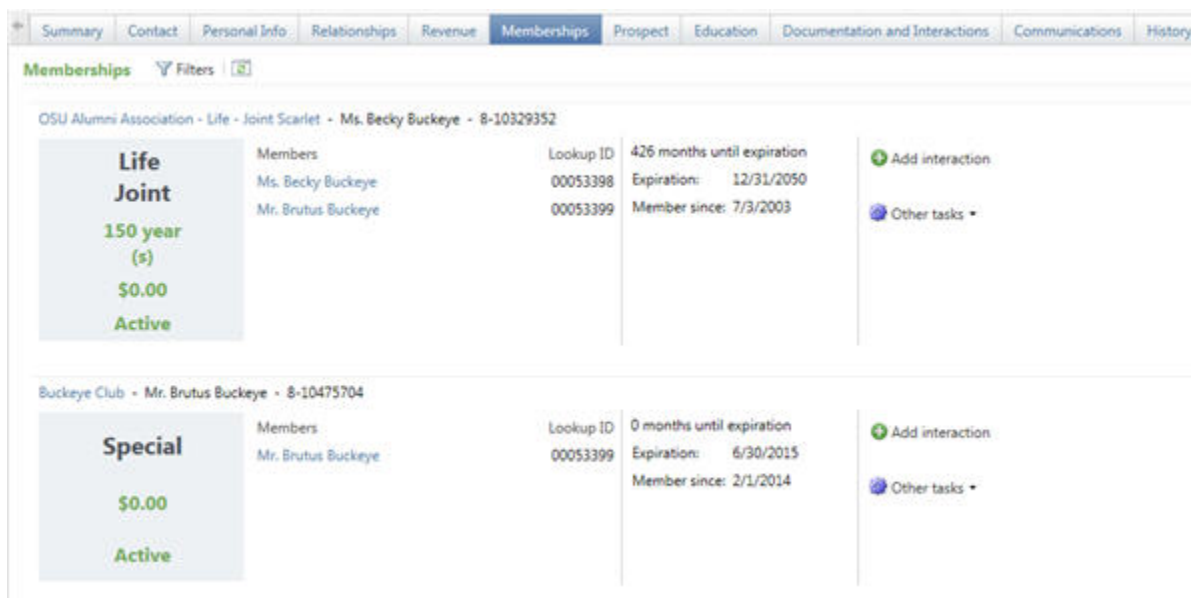
You can access the Memberships tab by clicking on the Memberships summary tile in the profile section.



The screenshot shows a constituent record with a 'Personal Information' tab on the left and a 'Memberships' tab on the right. The 'Memberships' tab is highlighted with a red box. It displays the following information:

- OSU Alumni Association**
- Ms. Becky Buckeye** (with a green checkmark icon)
- ID:** 8-10329352 **Status:** Active
- Expiration:** 12/31/2050
- Level:** Life Joint
- Member since:** 7/3/2003

The Memberships tab displays membership information for a constituent such as Buckeye Club, Friends of the Library, Wexner Center for the Arts and various alumni societies. Information such as the membership program and level, member ID, status and type, member since date, and the membership level.



The screenshot shows the 'Memberships' tab in a constituent record. It displays two membership records:

Membership Program	Level	Member	Lookup ID	Expiration	Member since
OSU Alumni Association - Life - Joint Scarlet	Life Joint	Ms. Becky Buckeye	00053398	12/31/2050	7/3/2003
Buckeye Club	Special	Mr. Brutus Buckeye	00053399	6/30/2015	2/1/2014

Prospect Tab

You can access the Prospect tab by clicking on Prospect in the list of Constituencies.



The screenshot shows a constituent record with a 'Prospect' tab highlighted in red. It displays the following information:

- Individual** (Lookup ID: 00053399)
- Constituencies:** OSUAA Alumni, Alumnus, Committee member, Event registrant, Loyal donor, Major donor, Member, Planned giver, **Prospect** (highlighted), Recognized donor
- Personal Information:** Mr. Brutus A. Buckeye Sr. (with a photo icon), Nickname: Maiden
- Education:** Institution: The Ohio State University, Degree: BS-Bachelor of Science, Class of: 1958, Status: Graduated, Primary (with a green checkmark icon)
- Primary Relationships:** Spouse: Ms. Becky Buckeye, Household: Ms. and Mr. Becky Buckeye, Primary business
- Contact Information:** Primary phone: 614 688-3335 (Home), Primary email: brutus_buckeye1@aol.com (Preferred)

Constituent Record Navigation

The Prospect tab displays sub tabs containing Plans, Ask Summary, Step Summary, Prospect Summary, Prospect Team, Planned Gifts, Funding Interests, Campaigns, and Prospect Manager History.

Summary	Contact	Personal Info	Relationships	Revenue	Memberships	Prospect	Education	Documentation and Interactions	Communications	History	OnBase Documentation	Att...
Plans	Ask Summary	Step Summary	Prospect Summary	Prospect Team	Planned Gifts	Funding Interests	Campaigns	Prospect Manager History				
Plans (1) Filters More												
Constituent	Plan type	Plan name	Plan Manager	Start date	Date added	Historical?						
Mr. Brutus A Buckeye Sr	Solicitation	Support for Dr. Pollock and...	Scott A. Heilmann	7/22/2014	10/7/2014	No						





Education Tab

You can access the Education tab by clicking on the Education summary tile in the profile section.

Personal Information
**Mr. Brutus A. Buckeye Sr.**
Nickname:
Maiden:

Education
Institution: The Ohio State University
Degree: BS-Bachelor of Science
Class of: 1958
Status: Graduated
 **Primary**

The Education tab contains records of the constituent's higher education programs they are attending or completed, specifically programs they attended at OSU. This tab can include a list of programs from any education institution.


Summary	Contact	Personal Info	Relationships	Revenue	Memberships	Prospect	Education	Documentation and Interactions	Communications	History	OnBase Documentation	Onl...
Education (1)  More ▾												
Educational institution	Affiliated	Date from	Date to	Class of	Status	Primary education	Program	Degree				
The Ohio State Univ...				1958	Graduated		UGRD	BS-Bachelor of Scien...				
Involvement (4)  More ▾												
Type	Name	Position	Start date	End date	Educational institution							
Athletics	Men's Cheerleading											
OSU Campus Attended	Columbus											
OSU Dorm	Stadium Dorm											
OSU Activity	Block O-Officers											

For each educational institution, you can view the degree received, class year, program, and educational status. You can also view whether the program is the primary education for alumni information. If they attend both an undergraduate and graduate program, the primary will be their first OSU degree which is the undergraduate degree.

To view additional information about the constituent's history with the program, click on the Educational Institution. The Education page for the constituent and program displays.

Constituent Record Navigation

Mr. Brutus Buckeye
The Ohio State University


 1480 W Lane Ave
Columbus, OH 43221-3919
(614) 688-3335
brutus_buckeye1@aol.com

Lookup ID: 00053399


Spouse: Ms. Becky Buckeye
Household: Ms. and Mr. Becky Buckeye

Primary education: The Ohio State University


Active constituencies: OSUAA Alumni Alumni Committee member Event registrant Loyal donor Major donor Member Planned giver Prospect Recognized donor

The Ohio State University 

Status: **Graduated** Program: **UGRD** Dates attended: Information source: **Impact Conversion**
Comments: Degree: **BS-Bachelor of Science** Graduation date: **6/1/1958** Source date: **8/21/2011**
Honor awarded: Class of: **1958**
Preferred class of: **1958**

Additional Information (1)  **More** ▾

College/School	Division	Department	Sub department	Degree type
Business		Business Administration		MAJ

Attributes (0)  **More** ▾

Category	Attribute group	Value	Start date	End date	Comment
----------	-----------------	-------	------------	----------	---------

In addition to the details of the program, the education record can contain specific education related involvements. Involvements include the campus attended, dorm lived in, any extracurricular activities, University or College awards or scholarships that the individual was involved in or received during their time at Ohio State.

Documentation and Interactions Tab

You can access the Documentation and Interactions by clicking on the Documentation and Interactions tab.

Two sub tabs are available from the Documentation and Interactions tab: **Constituent Documentation** and **Interactions**. Each sub tab contains information about the constituent.

Constituent Documentation

The Constituent Documentation sub tab on a constituent record is used for adding notes about the constituent.

The screenshot shows the 'Documentation and Interactions' tab selected, with the 'Documentation' sub-tab active. The interface includes a search bar with 'Documentation type' and 'Title' fields, and 'Apply' and 'Reset' buttons. Below is a table of documentation entries.

Documentation type	Date	Type	Title	Author	Notification
Note	1/25/2008	Impact Free Text			
Note	11/3/2006	Letter TLC Code	TLC Donor - VIP Constituency Member		
Note	10/25/2005	Gift TLC Code	TLC Donor - VIP Constituency Member		✓
Note	9/16/2004	Impact Free Text			
Note	5/1/1996	PC Notes			

Interactions

Interactions are an activity with a donor, alumnus or friend in which we learn something new, or move an engagement or solicitation strategy forward. Interactions must be **individualized and meaningful**.

Interactions represent our institutional memory of our alumni, donors and friends. They give us contextual information about our constituents and their relationship for us.

All Interactions that were added to a constituent's record may be viewed.

The screenshot shows the 'Interactions' sub-tab active. It displays a list of interactions with columns for Date, Start time, End time, Time zone, Status, Owner, and Summary. Below the list is a detailed view of a specific interaction.

Date	Start time	End time	Time zone	Status	Owner	Summary	Contact method
4/3/2015				Completed	Mr. Michael C. Eicher	Ohio State Media Release Email from Michael C. Eicher	Electronic
3/18/2015				Completed	Mr. Michael C. Eicher	Leadership Transition email from Michael C. Eicher	Electronic
3/17/2015				Completed	Mr. Michael C. Eicher	University Announcement Email from Michael C. Eicher	Electronic
3/4/2015				Completed	Mr. Michael C. Eicher	Lifetime Director Winter 2015 Meeting recap	Letter
2/25/2015				Completed	Mr. Michael C. Eicher	Advancement Announcement Email from Michael C. Eicher and Michael V. Drake	Electronic
2/16/2015				Completed	Mr. Jamal T. Houssami	Follow up on Rasmiller Chair in Finance Quarterly Report	Electronic

Edit interaction

Summary: Follow up on Rasmiller Chair in Finance Quarterly Report

Status: Completed | Belongs to: Mr. Brutus Buckeye | Actual date: 2/16/2015

Category: Stewardship | Expected date: 2/16/2015 | Actual start time:

Subcategory: Fund Report | Expected start time: | Actual end time:

Owner: Mr. Jamal T. Houssami | Expected end time: | Contact method: Electronic

Participants: Mr. Brutus Buckeye | Time zone: | Sites:

Comment: Resent quarterly report detailing changes in the market and principal values of the David A. Rasmiller Chair in Finance. Mr. Rasmiller did not recall receiving the original report on 128.15.

Additional Contacts:

Additional Notifications:

Constituent Record Navigation

Add an Interaction

Add an Interaction to record any meaningful and noteworthy interactions you have with the constituent. All interactions should be entered in TAS within one week of the activity.

When you add an interaction, you can enter a summary or its objective, its expected and actual dates, and any comments or additional information about the interaction. All fields that are highlighted in yellow must be filled in before the Interactions is saved.

Add an interaction for Mr. Brutus Buckeye

General Additional Contactors and Notifications Suspect Info Other Information

Summary:

Status: Owner:

Category: Contact method:

Subcategory: Event:

Expected date: Actual date:

Expected start time: Actual start time:

Expected end time: Actual end time:

Time zone:

Comments

Participants

Participant
*

Help Save Cancel

On the **Additional Contactors and Notifications** tab, an option for “Additional Notifications” is available. This allows you to select another employee of the university to be copied on the Interaction in the daily Prospect Activity report (the Prospect Activity Report is received via email the day after an interaction is completed in TAS). While anyone involved in the specific interaction or with a prospect assignment to the constituent is already automatically copied, this allows you to notify additional individuals of a single interaction.

Individuals listed in the Additional Notifications field were not present during the interaction, but will find the information useful.

The screenshot shows a web application window titled "Add an interaction for Mr. Brutus Buckeye". It features four tabs: "General", "Additional Contactors and Notifications", "Suspect Info", and "Other Information". The "Additional Contactors and Notifications" tab is selected. Below the tabs, there are two main sections: "Additional Contactors" and "Additional Notifications". Each section contains a table with a header row and a data row. The "Additional Contactors" table has a header "Contactor" and a data row with a search icon. The "Additional Notifications" table has a header "Notification" and a data row. A red arrow points to the "Additional Notifications" section.

You are now able to designate additional employees to be copied by default on all of your own daily Prospect Activity reports. For example, a development officer may want an office assistant to be copied on all daily Prospect Activity reports; or, a supervisor may want to see all daily Prospect Activity reports for one of their direct reports.

To implement this feature, contact the Advancement IT Service Center (2tech@osu.edu) with the name of the Contactor and the name of the individual to be copied.

Communications Tab

A constituent's Communications tab provides a snapshot of OSU's communication with the constituent. On the Communications tab, you can view and manage the various communications and appeal mailings that include the constituent and how the constituent prefers to receive communication.

To help you navigate through this information, the Communications tab includes multiple sub tabs:

Communications, **Appeals**, and **Preferences**.

Communications

The Communications sub tab displays the various forms of bulk communication OSU has with the constituent. These communications might include newsletters, revenue receipts and acknowledgments, and event invitations.

Constituent Record Navigation

For each communication, you can view the date of the communication, its type and the channel that was used to send it (Mail, Email, Phone) .

Date sent	Communication	Details	Has responses	Site	Channel
Two months ago					
4/8/2015	Appeal Mailing	MED_MEDCTR-TADO-2015	No	All sites	Email
4/8/2015	Appeal Mailing	FCOB - OER - Thank a Donor Da...	No	All sites	Email
4/8/2015	Appeal Mailing	DEV_PG-Q-IRA-DM-5 - Planned...	No	All sites	Mail
4/7/2015	Appeal Mailing	DEV_PC event reminders (Water...	No	All sites	Email
4/1/2015	Appeal Mailing	UPRES-Drake-Investiture-Thank...	No	All sites	Email
Older					
3/31/2015	Appeal Mailing	DEV_PC eNews April 2015	No	All sites	Email
3/31/2015	Appeal Mailing	UPRES-Drake-Investiture-Not-O...	No	All sites	Email
3/26/2015	Appeal Mailing	Connect - March 2015 - Life Lear...	No	All sites	Email

Communications are automatically added to the constituent's record as a result of a correspondence or direct marketing process.

Appeals

Appeals are planned efforts OSU performs to contact constituents and generate gifts, such as direct mailings, phonathons, and programmatic messaging. Typically, an appeal occurs within a specific time period and has a monetary goal.

The Appeals tab displays the appeal mailings and the appeal e-mails that OSU sends to the constituent. For each appeal, you can view the date of the appeal, its source code and finder number, and its segment.

Appeal	Description	Mailing	Date sent	Source code	Package	Segment	Finder number	Test segment	Comments
Two months ago									
DEV_PG-Q-IRA-...	Planned Giving...	Planned Giving...	4/8/2015	DEVGPO6DMX...	DEV_PG-IRA-D...	PG IRA Base 62 to 85 >=\$250 Lifetime G...	205588403		
Older									
DEV_PG-Q-CG...	Planned Giving...	Planned Giving...	2/5/2015	PGxCGAxDMX...	DEV_PG-CGA-...	PG CGA Base GPSa 65 and Older	190879981		
DEV_PG-Q-CG...	Planned Giving...	Planned Giving...	2/5/2015	PGxCGAxEMXX...	DEV_PG-CGA-E...	PG CGA Base GPSa 65 and Over Email	192584712		
DEV_AG-Q-CYE...	CYE Donor Imp...	CYE1 Donor Imp...	1/1/2015	DEVEMXXEMX...	DEV_DR-CYE-D...	CYE1_Donor Impact Email	183797620		

Most appeals are automatically added to the constituent's record as a result of a correspondence process.

Preferences

On the Preferences tab, you can manage the communication preferences for the constituent. Communications preferences help ensure OSU communicates with constituents in ways that they prefer.

Communications preferences are grouped into two types: Solicit codes and Mail preferences.

Solicit Codes

Solicit codes provide a convenient method for flagging constituents as “exceptions to the rule” for your fundraisers. These codes tell you there are certain rules to follow when communicating with the constituent.

The naming convention for solicit codes is <Unit> <Restriction Type> <Detail> <Communication channel>.

Unit is the OSU college/unit abbreviation using TAS unit naming convention. UNIV applies to anywhere in the university.

Restriction types are:

- No Contact – do not contact by the specific channel
- No Solicit – do not ask for donations

Detail is the name of a particular publication or type of communication. If the detail section starts with “RULE_” this indicates that this solicit code is placed on the record due to an administrative rule rather than specifically requested by the constituent.

Communication channels are:

- All channels – do not send communications by any method (mail,email,phone,etc.)
- Mail – do not send postal mail
- Email – do not email
- Phone – do not call

Example of solicit codes:

- UNIV – No contact – All channels
- AA – No contact - Email
- ENG – No contact - Buckeye Eng – Mail
- UNIV – No contact – RULE_Peletonia Only – All channels
- WCA – No Solicit – All channels

Mail Preferences

Mail preferences allow you to define specifics about how a constituent wishes to receive mail.

For example, a constituent may request that you send her general correspondence to her primary home address and her donation acknowledgments and receipts to her business address.

Rather than set mail preferences separately for each mail type, you can set mail preferences for all the mail types of a constituent. When you set a mail preference for all mail types, the program replaces existing mail preferences with this mail preference.

Newsletters Tab

OSU is not using the Newsletters tab at this time.

Constituent Record Navigation

History Tab

The History tab displays an audit of the changes made to the constituent's record.

Date	User	Action	Field changed	Value before	Value after	Process	Application
5/11/2015 8:21:32 AM	ISLANDIwooten.83	Add	Note.AUTHORID	n/a	Kristyn E. Wooten	Application	Blackbaud App Server (WebShell)
5/11/2015 8:21:32 AM	ISLANDIwooten.83	Add	Note.CONSTITUENTNOTETYPECODEID	n/a	Gift TLC Code	Application	Blackbaud App Server (WebShell)
5/11/2015 8:21:32 AM	ISLANDIwooten.83	Add	Note.DATEENTERED	n/a	2015-05	Application	Blackbaud App Server (WebShell)

On the History tab, you can view the changes and revisions made to the constituent record. For each change, you can view the date and time of the change, the action performed, and the field affected, the field values before and after the action, and the user or process that performed the change.

OnBase Documentation Tab

The OnBase Documentation tab displays information about the constituent that have archived in our document management system.

Document Type	Document Name	Document Date
Media Mention/News Article	Media Mention/News Article - 00...	10/8/2000
Media Mention/News Article	Media Mention/News Article - 00...	9/28/1999
Media Mention/News Article	Media Mention/News Article - 00...	9/14/1999
Media Mention/News Article	Media Mention/News Article - 00...	9/3/1999
Media Mention/News Article	Media Mention/News Article - 00...	11/6/1997

Different types of documents may be listed for a constituent such as Deceased or Media Mention/News Article. Click on the document type to obtain a link to the article. Then click on the link and a document viewer will open in a separate window so that you can read the information.

Attributes Tab

On the Attributes tab of a constituent record, you can view and manage constituent attributes. You can use attributes to store specialized information about a constituent when no field or tab exists for that information. You can query on attributes to gather constituents who share a common characteristic.

i For example, OSU uses constituent attributes to track:

- Some legacy Impact constituent codes
- Stewardship/Donor Relations preferences
- Awards and Honors
- Miscellaneous lists

Category	Attribute group	Value	Start date	End date	Comment
AA Alumni House Panel Amount	AA	\$1,000.00			
AA Alumni House Panel Location	AA	11			ANNE & DAVID RASMILLER...
Audience Segment	Market Research	Alumni - Life Learners	10/20/2012		
Audience Segment - Archive	Market Research	Alumni - Life Learners	10/20/2012		
FCOB Lists	FCOB	Fisher 500	10/28/2013		
FCOB Lists	FCOB	FCOB Interests-Real Estate	10/28/2013		
FCOB Lists	FCOB	FCOB Interests-Finance	10/28/2013		
FCOB Lists	FCOB	FCOB Interests-Faculty	10/28/2013		
FCOB Lists	FCOB	FCOB Interests-General	10/28/2013		
Gift Planning Audit - Exception	Planned Giving	Exclude	2/3/2013		DAI Upload
Legacy Constituency Code		Vol Com-Business	3/14/1996		
Legacy Constituency Code		DEV Ohio State Impact	2/25/2010		
Met Gordon Gee	UNIV	Yes			
OSU Awards and Honors	OSU Info	Gerlach Award	1/1/2008		

Events Tab

On the Events tab of a constituent record, you can view event registration history for the constituent. Event information such as the event name, start date, registration option, quantity and registration fees are displayed.

Main event	Event name	Start date	End date	Registration option	Quantity	Registration fee	Receipt amount	Main event name
AA_ADV-2015 Neil L...	AA_ADV-2015 Neil L...	4/7/2015	4/7/2015	Individual	1	\$0.00	\$0.00	AA_ADV-2015 Neil L...
ADV-2015 President...	ADV-2015 President...	3/31/2015	3/31/2015	Individual	1	\$0.00	\$0.00	ADV-2015 President...
FCOB-Football Suite...	FCOB-Football Suite...	11/22/2014	11/22/2014	Guest	1	\$0.00	\$0.00	FCOB-Football Suite...
AA-Ohio State Adv...	AA-Ohio State Adv...	11/22/2014	11/22/2014	Individual	1	\$0.00	\$0.00	AA-Ohio State Adv...
FCOB Pre-Game Ind...	FCOB Pre-Game Ind...	11/22/2014	11/22/2014	Individual	2	\$0.00	\$0.00	FCOB Pre-Game at F...
FCOB-Football Suite...	FCOB-Football Suite...	11/1/2014	11/1/2014	Guest	2	\$0.00	\$0.00	FCOB-Football Suite...
FCOB Pre-Game Blin...	FCOB Pre-Game Blin...	11/1/2014	11/1/2014	Individual	2	\$0.00	\$0.00	FCOB Pre-Game at F...
DEV-Foundation Bo...	DEV-Foundation Bo...	10/17/2014	10/17/2014	Guest	1	\$0.00	\$0.00	DEV-Foundation Bo...
DEV-Evening of Div...	DEV-Evening of Div...	10/16/2014	10/16/2014	Individual	2	\$0.00	\$0.00	DEV-Evening of Div...
ADV-The Jameson C...	ADV-The Jameson C...	10/8/2014	10/8/2014	Individual	1	\$0.00	\$0.00	ADV-The Jameson C...
AA-Archie & Bonita...	AA-Archie & Bonita...	5/16/2014	5/16/2014	Individual	1	\$0.00	\$0.00	AA-Archie & Bonita...
AA-Naples Event 20...	AA-Naples Event 20...	2/15/2014	2/28/2014	Individual	1	\$0.00	\$0.00	AA-Naples Event 20...
FCOB Pre-Game Pen...	FCOB Pre-Game Pen...	10/26/2013	10/26/2013	Individual	2	\$64.00	\$64.00	FCOB Pre-Game at F...

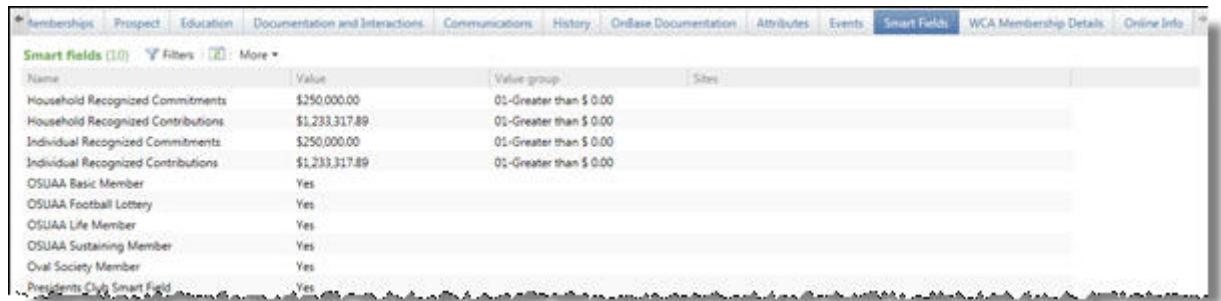
Constituent Record Navigation

Smart Fields Tab

Smart fields provide users quick access to specific, calculated information that otherwise would require time and the configuration of queries and reports to view.

For example, smart fields are available for Individual recognized contributions, individual recognized commitments, corporate giving (with matching), Corporate giving (without matching), and other summary values.

Smart fields are updated nightly.



Name	Value	Value group	Sites
Household Recognized Commitments	\$250,000.00	01-Greater than \$ 0.00	
Household Recognized Contributions	\$1,233,317.89	01-Greater than \$ 0.00	
Individual Recognized Commitments	\$250,000.00	01-Greater than \$ 0.00	
Individual Recognized Contributions	\$1,233,317.89	01-Greater than \$ 0.00	
OSUAA Basic Member	Yes		
OSUAA Football Lottery	Yes		
OSUAA Life Member	Yes		
OSUAA Sustaining Member	Yes		
Oval Society Member	Yes		
Presidents Club Smart Field	Yes		

OSU Employee Tab

For constituents who are OSU employees and have the OSU Employee constituency, the OSU Employee tab displays on the record. On this tab, you can view all of the employee's active appointments with details such as their job title, the departments they belong to, their employment status and other information related to their position.

- The information on the OSU Employee tab is populated and updated every two weeks via integration with the Human Resources database.
- The information includes all active employee appointments (including the employee's primary appointment) and those appointments that have been inactivated for 3 months.
- After an employee's appointment has been inactive for over 3 months, that appointment no longer displays.



Primary Appointment	Department	Home Department	Classification	Percentage	Compensated	Status
Yes	Advancement IT (49143)	Advancement Services (D4990)	Unclassified Civil Service	100	Yes	Active

Constituent Record Navigation

You can also view the primary appointment information on the Relationships tab of the constituent record when you expand the view of their relationship with The Ohio State University.

The screenshot displays the 'Relationships' tab of a constituent record. The top navigation bar includes tabs for Summary, Contact, Personal Info, Relationships (selected), Revenue, Memberships, Education, Documentation and Interactions, and Community. Below this, the 'Relationships' section shows a list of relationships with columns for Name, Constituent type, Type, Relationship, Start date, and End date. The first relationship is highlighted, showing details for 'The Ohio State University' as an 'Organization' with a 'Contact' type, 'Employer' relationship, and a start date of 3/8/2010.

Relationships (4) | Filters | More ▾

Name	Constituent type	Type	Relationship	Start date	End date
Individual					
Organization					
The Ohio State University	Organization	Contact	Employer	3/8/2010	

Relationship

Ms. Carol Lee Brenner is the: Employee Start date: 3/8/2010
The Ohio State University is the: Employer End date:

Contact

Contact type: Address Only

Employment Information

Job title: Development Training Coord Industry: Colleges & Universities
Category: Coordinator - 040 Start date: 10/9/2011
Career level: End date:

Comments

Department: Advancement IT (49141)
Home Department: Advancement Services (D4990)
Status: Active
Pay Frequency: Monthly
Fulltime / Parttime: Fulltime (100%)
Regular / Temporary: Regular
Faculty / Staff: Staff
Start Date: 03/08/2010

Constituent Record Navigation

Organization Constituents

Organization records track important data pertaining to the companies, businesses, foundations, associations, schools, and trusts in your database.

Blackbaud CRM

Constituents | Name or lookup ID

Welcome, Blackbaud Training 1

Home • Constituents • Marketing and Communications • Revenue • Events • Memberships • Prospects • Fundraising • Analysis

More information

Reports

Lifetime Giving Report

Pledge Summary

Shortcuts

Recent searches

Recently accessed

Abbott Laboratories

Notifications: "Prospect Manager: Ryan Zinn", "VIP", and "VIP". Click here for more information.

Organization Lookup ID: 90000005

Constituents: Corporation/Business Committee member Loyal donor Major donor Prospect Recognized donor

Organization Information

Industry: Mfg-Drugs & Medicine

Employees: 0

Subsidiaries: 0

Parent

Contact Information

Primary phone: (866) 848-6841 (Business)

Primary email

Addresses (1 of 2)

200 Abbott Park Rd
PO Box 88
Abbott Park, IL 60064-0088

Business (Current)

Contacts (1 of 83)

Mr. Lawrence Curtiss Abbott

Address Only

Memberships (1 of 1)

Buckeye Club

Abbott Laboratories

ID: 8-10180956 Status: Lapsed

Expiration: 5/30/2013

Level: National Champions

Member since: 2/1/2012

Show less

Customize files

Contact Organization Info Relationships Revenue Memberships Prospect Documentation and Interactions Communications History Online Documentation Attributes Smart Fields

Expand all Collapse all

Addresses (2)

Phone numbers (2)

Email addresses (2)

The Organization Record

Much of the information on organization constituent records is organized on tabs, similar to individual records. In this section, we will only review tabs or fields specific to organizations. The following chart summarizes the information housed on each tab.

Tab Name	Information
Contact	An organization's addresses, telephone numbers, fax number and email address are maintained on the Contact tab.
Organization Info	<p>The Constituencies sub tab shows the affiliations that the organization has with OSU.</p> <p>The data on the Organization sub tab includes organization details, Aliases, Matching gift conditions (for example, if the matching gift is for an employee or retiree and whether the gift amount is for the full gift amount or just the tax deductible portion), and alternate lookup IDs.</p>
Relationships	<p>On the Relationships tab, you keep track of individuals and organizations with whom the organization is associated.</p> <p>Current and previous group memberships are also displayed on the Relationships tab.</p>
Attributes	On the Attributes tab, you store specialized information about an organization when no field or tab exists for that information.
Smart Fields	<p>Smart fields provide users quick access to specific, calculated information that otherwise would require time and the configuration of queries and reports to view.</p> <p>For example, smart fields are available for Corporate Giving (with matching), Corporate Giving (without matching), individual recognized commitments and individual recognized contributions.</p>

Constituent Record Navigation

Organization Info

To view and manage information about an organization constituent, select the Organization tab.

On this tab, you can manage matching gift conditions for the organization. You can track the matching gift policies such as the minimum and maximum matching factors and any notes entered. An organization can have multiple levels of matching gift details.

← Contact **Organization Info** Relationships Revenue Memberships Prospect

Constituencies **Organization**

Expand all Collapse all

Organization details

Name: Abbott Laboratories Number of employees: 0
Industry: Mfg-Drugs & Medicine Number of subsidiaries: 0
Website: ☒ Primary organization

Aliases (5) More ▾

Name	Type
Abbott Labs - Ross Products Divisi...	Also Known As
Abbott Nutrition	Historical
Ross Laboratories	Historical
Ross Products Division of Abbott...	Historical
Ross Products Division of Abbott...	Historical

Matching gift conditions

Employee

Matching factor:	0.00	Max match per year:	No maximum
Min match per gift:	\$25.00	Max match total:	No maximum
Max match per gift:	\$5,000.00	Matching amount:	Full gift amount
Revenue type:	Gift		
Applies to:			
Notes:			

Contacts for Organizations

Organization specific contacts that OSU interacts with are tracked as relationships to the organization on their constituent record. OSU is able to mail and report to specific contact types.

Constituent Record Navigation

The screenshot displays the 'Relationships' tab in a software interface. The top navigation bar includes 'Contact', 'Organization Info', 'Relationships', 'Revenue', 'Memberships', 'Prospect', and 'Documentation and Inter'. Below this, the 'Relationships' sub-tab is active, showing a list of 1,475 relationships. The list has columns for Name, Constituent type, Type, Relationship, Start date, and End date. A red box highlights the relationship between 'L Brands Inc' and 'Mr. Bruce Alan Soll'. Below the list, a detailed view of this relationship is shown, including the relationship type 'Business', the contact type 'Presidents Club', and the start and end dates.

Name	Constituent type	Type	Relationship	Start date	End date
Ms. Carol O'Brien Simpson	Individual	Contact	Employee		
Ms. Polly Sinesi	Individual	Contact	Employee		
Mr. Ezra D. Singer	Individual	Contact	Employee		
Ms. Sarah Katherine Skala	Individual	Contact	Employee		
Kelly Slager	Individual		Employee		
Ms. MaryJane Slak	Individual		Employee		
Ms. Cynthia Slavik	Individual	Contact	Employee		
Ms. Denise R. Slazyk	Individual	Contact	Employee		
Mr. Jeff Sluder	Individual		Former Employee	4/17/2013	
Mr. Stephen Edward Smieszek	Individual	Contact	Employee		
Mr. Adam Christopher Smith	Individual	Contact	Former Employee	8/19/2013	
Mr. Brian Richard Smith	Individual		Former Employee	1/1/1870	
Mr. Brian Smith	Individual		Employee		
Mr. Daniel William Smith	Individual	Contact	Employee		
Mr. Geoffrey King Smith Jr.	Individual	Contact	Employee		
Ms. Monica Parham Smith	Individual		Former Employee	1/1/1870	
Mr. Stephen M. Smith	Individual	Contact	Employee		
Ms. Sue Smith	Individual		Employee		
Ms. Tara Abbott Smith	Individual	Contact	Employee		
Mr. Vincent Algene Smith	Individual		Employee		
Ms. Megan Day Snare	Individual		Former Employee	1/1/1870	
Ms. Gayle Glenn Snyder	Individual	Contact	Employee		
Mr. Chi-Yin Louis So	Individual	Contact	Former Employee	10/23/2014	
Mr. Wai Hung So	Individual	Contact	Employee		
Mr. Bruce Alan Soll	Individual	Contact	Presidents Club Contact		

Relationship

L Brands Inc is the: Business Start date:

Mr. Bruce Alan Soll is the: Presidents Club Contact End date:

Contact

Contact type: Presidents Club

Comments

Corporate Info Tab

Organization Info

When you add an organization relationship to an organization constituent, such as a parent corporation or a subsidiary, you create a corporate structure that strengthens your ability to gather information.

You can track these relationships with customized hierarchical summaries that display how relationships connect within the corporate structure. Summaries include information such as organization and employee giving, primary contacts, organization size, and pending giving.

Constituent Record Navigation

An organization's Corporate Structure displays the corporate summaries.

Organization name	Organization giving amount	Employee giving amount	Employee constituents	Primary contact	Start date	End date
Abbott Laboratories	\$6,884,955.04	\$1,879,915.13	1157			
Abbott Fund	\$1,440,410.69	\$81,934.51	13			
Faultless Rubber Co.	\$100.00	\$0.00	0			
Abbott Laboratories Li...	\$250.00	\$0.00	0			
Abbott Laboratories F...	\$0.00	\$0.00	0			
Abbott AG Diagnostics	\$0.00	\$0.00	1			
Abbott Vascular Devices	\$0.00	\$350.00	3			

Corporate Information

The Corporate Information page displays additional information about organizations selected in the Corporate structure hierarchy on the Corporate Info tab. You can view detailed information about the revenue, employees, or prospect plans of the selected organizations.

To Access the Corporate Information Page:

1. Open the organization's constituent record.
2. Click on **Corporate info** tab.
3. On the action bar, click **Go to**, then select **Revenue**, **Employee information**, or **Prospect plans**.

Organization	Organization giving amount	Employee giving amount
Abbott Laboratories	\$6,884,955.04	\$1,879,915.13
Abbott Fund	\$1,440,410.69	\$81,934.51
Faultless Rubber Co.	\$100.00	\$0.00
Abbott Laboratories Li...	\$250.00	\$0.00
Abbott Laboratories F...	\$0.00	\$0.00
Abbott AG Diagnostics	\$0.00	\$0.00

Constituent Record Navigation

The following table provides a summary of the information available on the Corporate Information page.

Tab name	Information
Revenue	This tab displays detailed information about the revenue of the selected organization, such as sponsorship, money raised by employees, special events participants, matching gift programs, and other employee giving.
Employee Information	This tab provides general information about each organization in the structure and their employees, such as organization size and volunteer totals.
Prospect Plans	This tab displays prospect plans associated with each organization in the structure and their employees, such as current stage and primary prospect manager.

Groups

In TAS, there are group records that represent a group of individuals or organizations such as families or corporations. For example, a group record may include:

- Multiple constituents who pool their funds together to donate to OSU in a joint effort (family foundations or clubs)
- A group of constituents who serve on a committee (OSU committees and boards)
- A prospect group

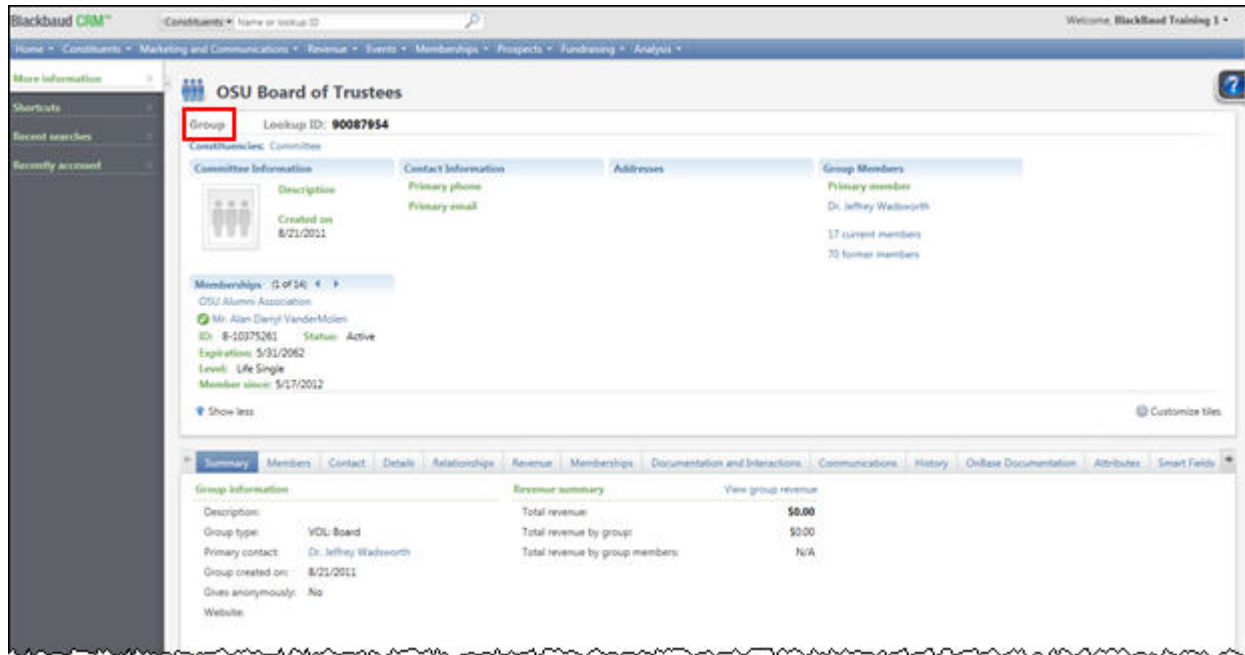
Households can also be considered a type of group. At OSU, a household record is used only for de-duping a mailing only.

Examples of Groups are:

- Family Foundation/Extended Family
- Family/Friends
- Corporations/Corporate Foundations
- Corporation/Subsidiaries/Regional Offices
- OSU Boards and Committees
- Alumni Clubs

Constituent Record Navigation

The Group Record



Much of the information on group constituent records is organized on tabs. The following chart summarizes the tabs that contain information for the group (most of the tabs on a group record are blank).

Tab Name	Information
Summary	The Summary tab displays an overview of a group constituent, including the revenue, activities, and group members.
Members	The Members tab displays all active members of a group. A checkmark displays beside the primary contact. Roles can be defined for each of the group members and start and end dates can be specified for the roles. If authorized you can add, edit, and delete group members on this tab.

Committees

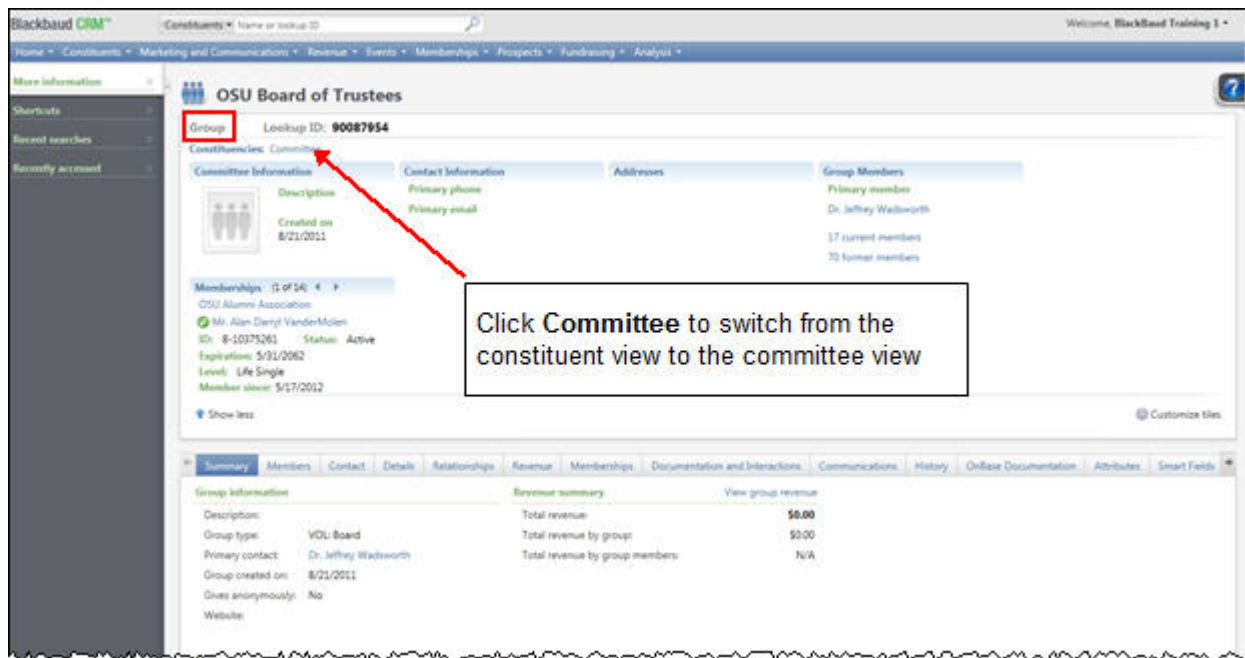
Committees are a specialized type of group in **TAS**.

Constituent Record Navigation

In some cases, committees may be used for organizations, such as OSU alumni clubs. In these cases the committee records serve the dual purpose of an organization constituent record AND recording individual constituent service to OSU (club officers, etc.).

The Committee Record

Each committee record has two views: a constituent view and a committee view. The constituent view of a committee record contains the same tabs and information as a group record.



When a committee is added, you can indicate whether or not the committee can coordinate events, solicit revenue, and set committee goals—three things regular groups cannot do.

The tabs available on the committee view of the committee record depend on the options you select when you create the record.

- If you select that the committee can coordinate events, the record has an Events tab.
- If you select that the committee can solicit revenue and set fundraising goals, the record has a Fundraising goals tab and a Campaigns tab.
- If you select that the committee can set committee goals, the record has a Committee goals tab.

Constituent Record Navigation

The following table summarizes the functions of the tabs on the committee view of a committee record.

Tab name	Information
Summary	The Summary tab provides an overview of the committee including its members, primary contact, giving summary, recent communication, and recent interactions.
Members	The Members tab displays all active members of the committee. A checkmark displays beside the primary contact. You can define roles for each of the group members and specify start and end dates for the roles. You can add, edit, and delete committee members on this tab.
Contact	The Contact tab displays the address, email address, and phone number for the committee.
Fundraising goals	<p>Fundraising goals allow you to track the committee's progress toward raising a specified amount. When the group is listed as a solicitor on revenue, the sum of the revenue is tracked automatically as progress toward the goal on the Goals tab.</p> <p>If a committee is a fundraiser for a campaign, the goals of the campaign are displayed on the Fundraising goals tab of the committee. However, the campaign goal can be edited only from the campaign, not from the committee.</p>
Committee goals	Committees can have goals that are not monetary in nature, such as a goal for a total number of letters in a letter-writing campaign. Committee goals exist only if the committee can set non-monetary committee goals, such as recruitment of new members.
Campaigns	When you associate a committee with a campaign, the committee becomes a fundraiser for the campaign. Any goals for the campaign display on the Fundraising goals tab of the committee. You can also add a committee to a campaign on the Fundraisers tab of the campaign.
Events	On the Events tab, you can add an event which the committee will help coordinate. You can also add the committee as a coordinator on the Coordinators tab of an event.

Households

Households are another specialized type of group in **TAS**. The purpose of a household record is to group constituents so that you can select how to mail to spouses or partners living under one roof.

i NOTE: At OSU, these business rules for household records apply:

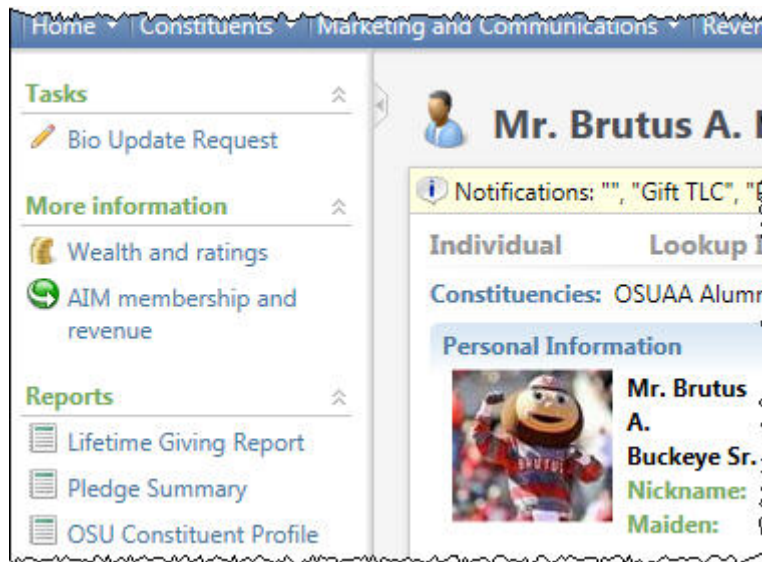
- Members of households will be limited to spouses and partners and will not include children and other family members.
- Households will not be used to track donations. Instead, the donation will be recorded on one member of the household's constituent record and the spouse will receive 100% spouse recognition credit by default.

Constituent Record Navigation

Additional Constituent Record Information

The Explorer Bar

The explorer bar displays tasks and activities related to the current page. For example, when a constituent record is open, the explorer bar displays several action groups. Each action group contains page actions that allow you to perform tasks, run reports, and access additional information about the constituent.



Action Group	Information
Tasks	You can send a request to the Advancement Records department to update information listed on the constituent's record.
More information	You can view Wealth and ratings information about the constituent.
Reports	You can run reports for the constituent including Lifetime Giving, Pledge Summary and OSU Constituent Profile.

Bio Update Request

All users of TAS are responsible to help ensure that the biographical information on each constituent's individual record is accurate. When you identify that biographical information is not correct, the Bio Update Request form allows you to submit updates directly from an individual record. The submission is automatically routed to the Advancement Records team where it is reviewed and the information is updated in TAS within 1-3 days of submission.

***Please note: The Bio Update Request is available only on Individual records. It is not currently available on organization or group records.**

Use the Bio Update Request form to submit the following types of updates for an individual record:

- Personal information
- Addresses
- Phone numbers
- Email addresses
- Employment
- Spouse
- Individual relationships

You will receive an email once the update is completed in TAS.

Constituent Record Navigation

Constituents ▾ Name or lookup ID

eting and Communications ▾ / Rev

Mr. Brutus A.

Notifications: "Gift TLC"

Individual Lookup

Constituencies: OSUAA Alum

Personal Information

Mr. Brutus A. Buckeye Sr

Nickname:

Maiden:

Addresses (1 of 4) ▾

C/O Burlington Capital LLC

1700 Farnam St Ste 2850

Omaha, NE 68102-2076

Seasonal (Seasonal)

Show less

Summary Contact P

Revenue summary

Total revenue:

Total household revenue:

Membership revenue:

Event revenue:

Recent and upcoming activel

4/28/2015 Interaction

4/28/2015 Interaction

4/20/2015 Interaction

4/7/2015 Event registration

4/3/2015 Interaction

3/31/2015 Event registration

3/18/2015 Interaction

3/17/2015 Interaction

3/4/2015 Interaction

2/25/2015 Interaction

Biographic Update Request

Personal Address Email Phone Spouse Relationship Employment Relationships - Other Individual

Personal

Title: Mr.

First Name: Brutus

Middle Name: A.

Last Name: Buckeye

Familial Suffix: Sr.

Professional Suffix:

Nickname:

Maiden name:

Marital status: Married

☐ Constituent is deceased

Deceased Date: mm/dd/yyyy

Deceased source:

Deceased Source URL:

Note: Enter the website URL for the obituary or other source if applicable (not required).

Gender: Male

Birth date: 3/15/1936

Age: 79

Note: Enter any additional notes or instructions here.
This comment will not display on the constituent record.

Comment:

Questions about this form or other biographic data? Email bioupdate@osu.edu or call (614) 292-2141.

Submit Cancel

To Submit a Bio Update Request:

1. On the Explorer bar on an individual record, click **Bio Update Request**.
 2. On the **Bio Update Request** form, enter personal information updates on the Personal tab.
 3. Click on the Address tab and enter address information updates.
 4. Click on the Email tab and enter email address updates.
 5. Click on the Phone tab and enter phone number updates.
 6. Click on the Spouse Relationship tab and enter spouse or life partner relationship updates.
 7. Click on the Employment tab and enter employment information updates. If the constituent is a current OSU employee, you may not update their employment information using this form.
 8. Click on the Relationships – Other Individual tab and enter updates to the constituent's individual relationships. Examples include children, parents, other relatives, financial advisors, etc.
 9. Click **Submit** from any tab to complete the update request.
-

Requests to Add a New Constituent

When you search for a constituent's individual or organization record and you cannot find it, you must submit a request to the Advancement Records department to have a new constituent added.

Send an email to bioupdate@osu.edu . Be sure to list all of the pertinent information that you have so the constituent's record is complete. List the following information for the individual or the household in your email:

- Last name
- First name
- Middle name
- Title
- Address
- City
- State
- ZIP
- Phone type - Home, Cell, Business (list each phone number and identify the type)
- Phone number
- Email type - preferred, other (list each email address and identify the type)
- Email address
- Marital Status
- Gender

You will receive an email from the Advancement Records department after the constituent's record is added.

Events

OSU organizes a variety of events including fundraising (“revenue-generating”) and cultivation events. OSU event types include: dinners, receptions, meetings, tailgates, reunions, etc.

From the Events page you can search for and view an event in the event calendar or search for an event record in TAS. You can search for events that are upcoming as well as completed or cancelled events. You are able to view the basic information about an event.

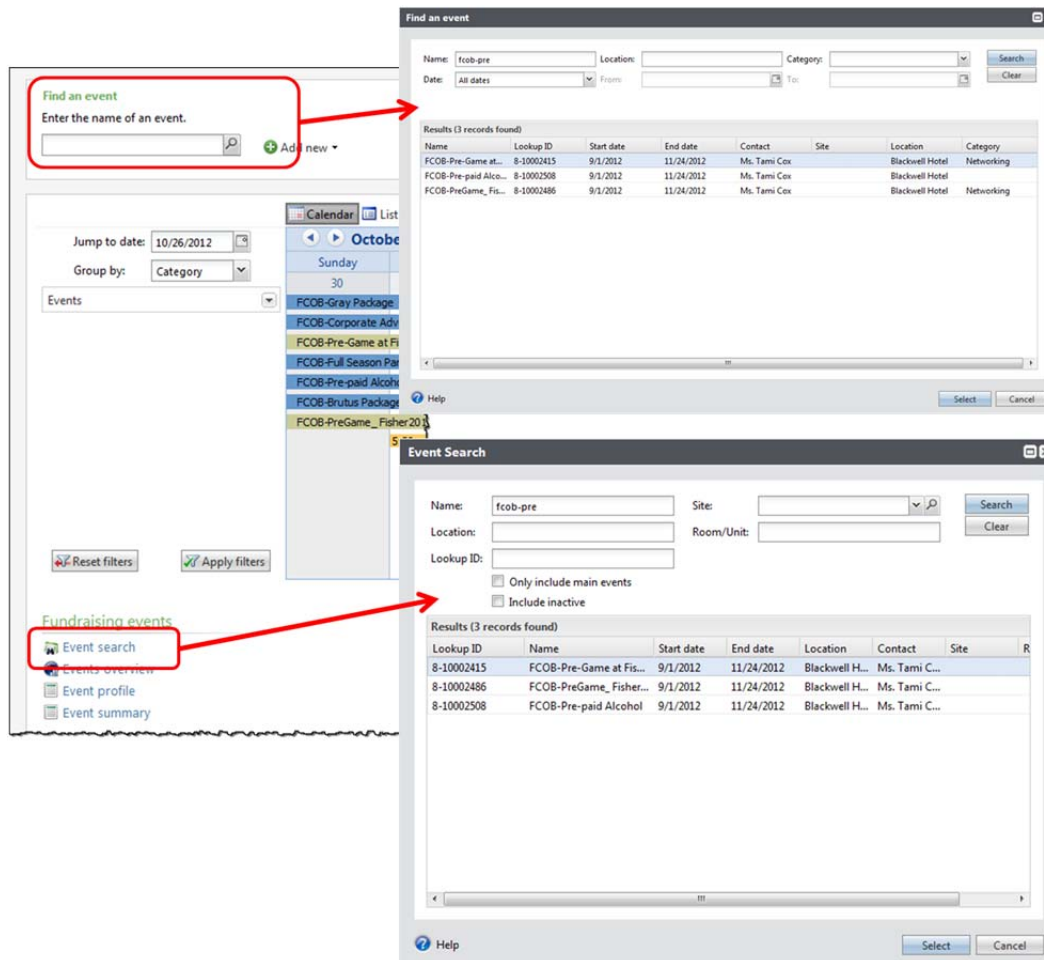
Specific naming criteria has been established to allow for quick access when searching for events. The Event name is comprised of the following:

- abbreviation for the area planning the event followed by a hyphen –
- title of event followed by a hyphen –
- date of event

For example:

- DEV-Evening of Distinction-10/22/2010 (Event planned by Development Events)
- DEV-Jesse Owens Celebration dinner-04/21/2011
- FCOB-Alumni Reunion dinner 2010-10/15/2010 (Event planned by Fisher College)
- FAES-Dean’s Spring Scholarship Dinner 2010-05/15/2010 (Event planned by Ag)

Constituent Record Navigation



To Find an Event in the Event Calendar:

1. On the navigation bar, click **Events**.
2. On the **Events** page, enter an event name in the **Find an event** field.
3. Enter filter values to refine your search criteria.
4. Click **Search**. Select the event to open and then click **Select**.

To Search for an Event Record:

1. On the navigation bar, click **Events**.
2. On the **Events** page, enter an event name in the **Find an event** field or click **Event search**.
3. Enter filter values to refine your search criteria.
4. To include inactive events as well as active events in your search, select **Include inactive**.

Constituent Record Navigation

5. To include only main events and omit supporting events in your search, select **Only include main events**.
6. Click **Search**.
7. Select the event to open and then click **Search**.

Event Record

Each event record contains a summary area as well as several tabs which house information about the event.

The screenshot displays the 'DEV-Oval Society Dinner - June 4, 2012' event record. The top section contains event details: Start date (6/4/2012 - 7:00 PM), End date (6/4/2012 - 9:00 PM), Site, Location (OSUMAIN-Pizzuti House, 80 North Drexel, Bexley, OH 43209), Room/Unit, Contact (Ms. Rebecca Sue Crowell), Coordinator (Ms. Cynthia Lynn Plummer), and Category (Stewardship). The status is 'Active' with a green checkmark. Two progress indicators are shown: 'Event expenses' at 0% of budget and 'Event capacity' at 0% of capacity. Below this is a tabbed interface with 'Tasks/Coordinators' selected. The 'Coordinators' section shows Ms. Cynthia Lynn Plummer as the primary coordinator for the event. The 'Tasks' section lists two tasks: 'Design Program' assigned to Ms. Amy Lynn Fair on 8/1/2011, and 'Reserve Venue' assigned to Ms. Cynthia Lynn Plummer on 8/15/2011. Both tasks are marked as completed with green checkmarks.

Tab Name	Information
Tasks/Coordinators	This tab contains information about the tasks required to prepare for the event and coordinators assigned to the event.
Registrations	This tab contains information about the constituents registered for the event.

Constituent Record Navigation

Tab Name	Information
Speakers	This tab displays the speakers associated with the event and information about their presentations such as topic and scheduled date and time.
Invitations	This tab contains information about the constituents to invite to the event. The Event Invitees grid displays a summary of invitees for the event.
Attributes	This tab displays attributes associated with the event.

Event Calendar

When an event is added in **TAS**, an option can be set to allow the event to display in the event calendar. You can access the event calendar two ways:

- From the Event page
- From an event record, click **View event calendar** under Tasks on the explorer bar

The event calendar displays all events occurring within the selected date range. You can narrow the events displayed by month, week, day, category, or location.

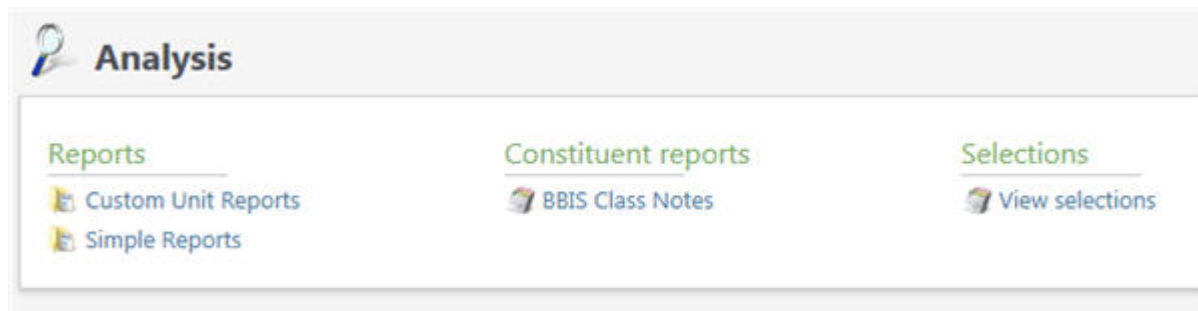
The screenshot shows the 'Events' section of a software interface. At the top, there's a search bar labeled 'Find an event' with a placeholder 'Enter the name of an event.' and a magnifying glass icon. To its right is a '+ Add new' button. Below the search bar is a 'Calendar' tab and a 'List' tab. To the left of the calendar, there are filters: 'Jump to date:' with a date picker set to '10/26/2012', 'Group by:' with a dropdown set to 'Category', and a list of 'Events'. Below these filters are 'Reset filters' and 'Apply filters' buttons. The main calendar view shows a grid for 'October 2012' with days of the week as columns and dates as rows. Events are listed as horizontal bars across the grid, with some showing specific times (e.g., '5:30 pm FCOB-MBL', '4:30 pm FCOB-Gri', '12:00 pm FCOB-Gri', '4:45 pm FCOB-Isaa'). To the right of the calendar, there are view toggles for 'Day', 'Week', 'Month', and 'Year', and an 'Export' button. At the bottom, there are links for 'Fundraising events' (Event search, Events overview) and 'Auction events' (Auction search, Auction item search). Callouts with arrows point to various elements: 'Search for all event types.' points to the search bar; 'Click to add a new single event, multi-level event, or online event.' points to the '+ Add new' button; 'Click to toggle between the calendar and list views.' points to the 'Calendar' and 'List' tabs; 'Use filters to view only specific events.' points to the filter section; 'Click on an event in the calendar to enable these tasks.' points to an event bar.

Constituent Record Navigation

- To view the event calendar for a specific day, select the day and click **Day** at the top of the screen.
- To view the event calendar for a specific week, select a day in that week and click **Week** at the top of the screen.
- To view the event calendar for a specific month, select a day in that month and click **Month** at the top of the screen.

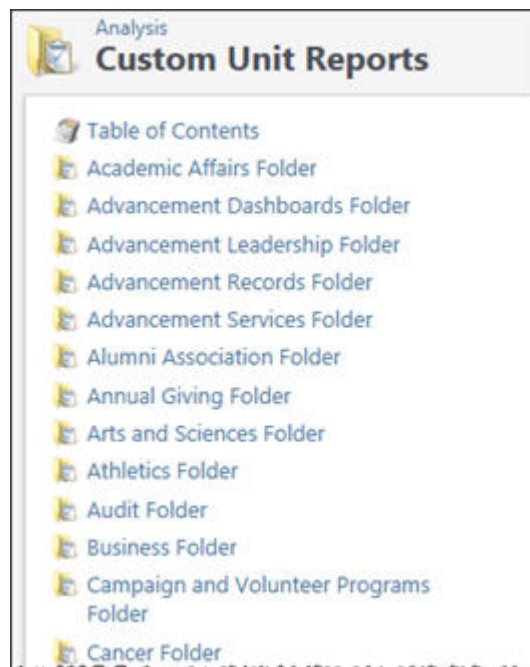
Analysis

From the Analysis page you are able to generate Custom Unit Reports or Simple Reports.



Custom Unit Reports

Custom Unit Reports are reports that were requested by a unit and then built by the Reporting and Analytics team. Once the report is built the Reporting and Analytics team trains the unit on the specifics of the report when it is delivered. The report is available in that unit's Custom Unit Reports folder and can be generated on demand.

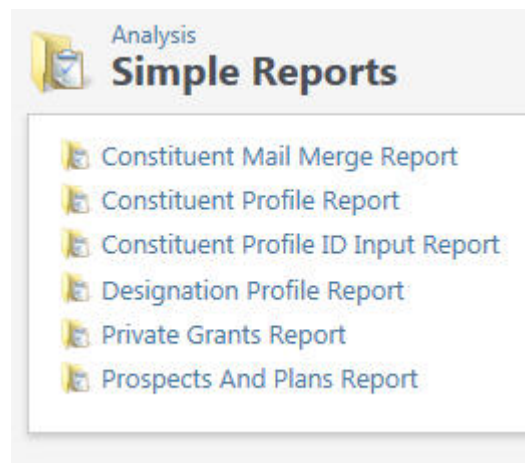


To generate a Custom Unit Report:

1. On the navigation bar, click **Analysis**.
 2. On the Analysis page, click **Custom Unit Reports**.
 3. A report directory of all units is displayed. Scroll down to locate your unit's folder. Click on your unit's **Folder**.
 4. A list of all the custom reports designed for your unit is displayed. Click on the name of the report that you want to run.
 5. Access to the Custom Unit Report directory may require an additional log in depending on our local security network. If that is the case you will first see a log in screen. For user name, type the domain name of: **island\name.#** Type your password and click **OK**. The unit report directory is displayed. This log in will be required once per browser session. You will not need to log in again until you close the current browser session.
-

Simple Reports

TAS also offers you the ability to generate several reports, known as Simple Reports, which are designed around standard query options and combined with standard output.



After selecting the report, you identify the parameters that are used to obtain the desired results. Each Simple Report consists of two reports, a help report and the report itself.


Constituent Record Navigation

Analysis > Simple Reports Constituent Mail Merge Report


 [Constituent Mail Merge Help Report](#)

 [Constituent Mail Merge Report](#)

The Help Report provides basic information about the report including the preferred output format, information listed on the report cover sheet, definition of each of the parameters and the output.

 **Constituent Mail Merge Help Report**

1 of 1 100% Find | Next

 **THE OHIO STATE UNIVERSITY**

Constituent Mail Merge

The Constituent Mail Merge report provides an excel formatted output appropriate for mail merging letters or email messages based on a list of TAS constituent lookup IDs provided by the user. Parameters facilitate the selection of appropriate seasonal addresses and relevant exclusions, as well as several householding and organization contact handling options.

All report data is generated out of the reporting data warehouse which operates on a delay, therefore data entered into TAS is not available via reporting on the same day. TAS data is copied into the warehouse overnight during the early hours of the morning, so the delay between TAS and the warehouse is typically less than 24 hours.

Preferred Output Format(s): XLS

Cover Sheet

The report cover sheet provides basic information about how and when the report data was generated.

#	Name	Description
1	Run Date	Date and time the report was generated
2	Data Date	Date and time that the reporting data warehouse was last refreshed
3	Row Count	Number of data rows produced. A warning notice will appear here if the 25,000 Maximum ID Limit is exceeded. A warning notice would also appear here if the output generates more than 65K rows, which is the limit for Excel exports.
4	Parameters	Displays the parameter values that were used to generate the report

Parameters

This report has a number of parameters which determine what records are returned and which columns are displayed. Parameters marked with an asterisk (*) require user action.

#	Name	Description
---	------	-------------

To create a Simple Report:

1. On the navigation bar, click **Analysis**.
 2. On the **Analysis** page, click **Simple Reports**.
 3. Click on the report output that you want.
 4. Select the Help Report to review a definition of the report and the parameters that are used to determine what records will be returned **or** select the report to begin.
 5. Select the parameters in order starting with number 1 and continue by moving from right to left from top to bottom on the page.
 6. Click **View Report**.
 7. Simple Report outputs are designed to be exported as either an Excel/CSV file or as a pdf.
 8. The output consists of a cover page and then the data/report.
-

RECOGNITION CREDIT

TAS allows OSU to give constituents hard credit (Revenue) and soft credit (Recognition credit). Revenue totals are used for receipt purposes and for financial fundraising totals. Recognition credits are used to calculate giving amounts.

TAS allows recognition credits to be in any amount, even more than the gift itself. TAS also allows any number of constituents to receive recognition credit for a gift. Defaults can be set up between constituents so that gifts from certain donors always result in recognition credits of a certain type being applied to specific constituents.

The following default settings were established by OSU:

- Spouses/partners will receive 100% recognition credit for any gift or pledge made by their spouse/partner
- Both spouses/partners will receive 100% recognition credit for any gift made by their donor advised fund or family foundation
- Both spouses/partners will receive 100% recognition credit for matching gifts or gifts made via United Way, other employer-sponsored giving vehicles, or third-parties such as a family-owned business.

The following section details the different types of recognition credits and how/when they will be given.

Recognition Credit Types

Recognition Credit	Definition
Self	Self-Recognition Credit is given to the constituent who the hard credit is associated with. Essentially it is who is going to be receipted for the gift (person/org that is on the check). The amount of self-recognition credit will be the amount of the gift unless otherwise noted.
Spouse	Spouse Recognition Credit is given to the spouse of the person who received the hard credit/self-recognition credit. The default is set to give spouse recognition to all individuals who have spouses indicated in the system for the same amount of the original gift.
Previous Spouse	Previous Spouse Recognition Credit is actually Spouse recognition credit but is changed to previous spouse credit if the marriage has ended. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.

Constituent Record Navigation

Recognition Credit	Definition
Owner	The Owner Recognition Credit is used to show credit to an individual for a gift that was given by a business they own. So the business will get a Self - recognition credit and the owner (if known and in our database) will get owner recognition credit.
Spouse - Owner	The Spouse-Owner Recognition Credit is to give recognition credit to the spouse of the owner of the business.
Previous Spouse -Owner	Previous Spouse - Owner Recognition Credit is actually Spouse - Owner recognition credit but is changed to previous spouse - owner credit if the marriage has ended. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.
DAF/Fam Fdn	DAF/Fam Fdn recognition credit is given to an individual constituent(s) who has given a gift through a donor advised fund or family foundation. It is common that more than one individual will get credit based off of a gift. The recognition credit amount is equal to the full amount of the gift unless otherwise noted. The donor advised fund or family foundation will get self-recognition credit and the individual(s) will get DAF/Fam Fdn recognition credit.
Spouse - DAF/Fam Fdn	Spouse DAF/Fam Fdn recognition credit is given to an individual constituent(s) whose spouse has given a gift through a donor advised fund or family foundation. The recognition credit amount is equal to the full amount of the gift unless otherwise noted. The donor advised fund or family foundation will get self-recognition credit and the individual(s) will get DAF/Fam Fdn recognition credit, and the spouse of the individual will get Spouse-DAF/Fam Fdn.
Previous Spouse -DAF/Fam Fdn	Previous Spouse - DAF/Fam Fdn Recognition Credit is actually Spouse DAF/Fam Fdn recognition credit but is changed to previous spouse - DAF/Fam Fdn credit when the marriage ends. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.
Pass - Through	Pass-Through Recognition Credit is given to an individual when they donate through another organization. (For example: they give to United Way but tag it for OSU.) Thus, a check is received from United Way with a list of people who donated to OSU and the amount. United Way receives Self Recognition Credit for the entire amount and the individuals receive Pass - Through Recognition Credit for the specific amount they donated.

Recognition Credit

Recognition Credit	Definition
Spouse Pass -Through	Spouse Pass-Through Recognition Credit is given to the spouse of an individual when they donate through another organization. (For example they give to United Way but tag it for OSU.) Thus, a check is received from United Way with a list of people who donated to OSU and the amount. United Way receives Self Recognition Credit for the entire amount. The individuals receive Pass - Through Recognition Credit for the specific amount they donated and the spouse receives Spouse Pass -Through credit for the same amount.
Previous Spouse Pass-Through	Previous Spouse Pass - Through Recognition Credit is actually Spouse Pass - Through recognition credit but is changed to previous spouse Pass - Through credit if the marriage has ended. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.
Third Party	Third Party Recognition Credit is given when an individual or corporation receives recognition credit based off of a gift that was given by an unrelated corporation or individual (i.e. not an owner/owner spouse or spouse relationship). The individual/company that gave the gift receives self - not eligible recognition credit or self-recognition credit depending on the situation.
Spouse Third Party	Spouse Third Party Recognition Credit is given to a spouse of an individual who receives recognition credit based off of a gift that was given by an unrelated corporation or individual (not an owner/owner spouse or spouse relationship). The individual/company that gave the gift receives self-not eligible recognition credit or self-recognition credit depending on the situation.
Previous Spouse Third Party	Previous Spouse Third Party Recognition Credit is actually Spouse Third Party recognition credit but is changed to previous spouse – Third Party credit if the marriage has ended. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.
Self - Not Eligible	Self - Not Eligible Recognition Credit is used when an individual chooses to give away their recognition credit. This is used when a company/individual gives a donation but chooses to give all of the recognition credit to someone unrelated (not an owner/owner spouse or spouse relationship) The company/individual who made the donation but gave it away gets Self - Not Eligible and the individual/company that it was given to receives third party recognition credit. This recognition credit type should not be used often and we do not want this to become common practice.

Constituent Record Navigation

Recognition Credit	Definition
Spouse – Not Eligible	Spouse - Not Eligible Recognition Credit is used when an individual's spouse chooses to give away their recognition credit. This is used when an individual spouse gives a donation but chooses to give all of the recognition credit to someone unrelated (not an owner/owner spouse or spouse relationship) The individual who made the donation but gave it away gets Self - Not Eligible, the spouse of the individual who gave it away receives spouse - not eligible and the individual/company that it was given to receives third party recognition credit.
Previous Spouse-Not Eligible	Previous Spouse - Not Eligible Recognition Credit is actually Spouse Not Eligible recognition credit but is changed to previous spouse – not eligible credit if the marriage ends. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.
Matching Gift	Matching Gift Recognition Credit is given to an individual when a company matches a gift or a percentage of a gift given by an individual. Thus, if an individual gives \$10 and their company matches 50%, then the individual would get \$10 self - recognition credit and \$5 matching gift recognition credit.
Spouse Matching Gift	Spouse Matching Gift Recognition Credit is given to the spouse of an individual where a company matches a gift or a percentage of a gift given by said individual. Thus, if an individual gives \$10 and their company matches 50%, then the individual would get \$10 self - recognition credit and \$5 matching gift recognition credit. Their spouse would get \$10 spouse recognition credit and \$5 spouse matching gift recognition credit.
Previous Spouse Matching Gift	Previous Spouse Matching Gift Recognition Credit is actually Spouse Matching Gift recognition credit but is changed to previous spouse Matching Gift credit when the marriage ends. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.
Historical Honor Roll Credit	The Historical Honor Roll Credit is used to indicate credit given to an individual/organization based on the business practices of giving away credits within the legacy system. This recognition credit type will not be used in TAS.

Recognition Credit

Recognition Credit	Definition
Spouse Historical Honor Roll Credit	The Spouse Historical Honor Roll Credit is used to indicate credit given to the spouse of an individual based on the business practices of giving away credits within the legacy system. This recognition credit type will not be used in TAS.
Previous Spouse Historical Honor Roll Credit	Previous Spouse Historical Honor Roll Recognition Credit is actually Spouse Historical Honor Roll recognition credit but is changed to previous spouse Historical Honor Roll credit if the marriage ends. This recognition credit type is needed so we can filter properly on the household screen and for recognition club counting purposes.

PROSPECT MANAGEMENT FOR FUNDRAISERS

The Prospects functional area helps you track potential donors to your organization. **TAS** supports the various aspects of prospect management, including prospect plans, opportunities, and more.

Lesson Objectives

After you complete this lesson, you will be able to:

- Tour a prospect record
- View My Fundraiser Page
- Create a prospect plan outline
- View a major giving prospect
- Add and edit a prospect plan
- Add an opportunity record
- Add a naming opportunity to a prospect opportunity record
- File a contact report
- Navigate a constituent's Wealth and Ratings page

Prospect Management for Fundraisers

Search for a Prospect

Use the **Prospect** search link for this search. Prospects may include individuals, organizations, or group records.

The screenshot shows a 'Prospect Search' window with the following fields and options:

- Search Criteria:**
 - Last/Org/Group name:
 - Country:
 - First name:
 - Address:
 - Lookup ID:
 - City:
 - Prospect Manager:
 - State:
 - ZIP/Postal code:
 - ☐ Match all criteria exactly
- Advanced search options:**
 - Search in: ☒ Individuals, ☒ Organizations, ☒ Groups/Households
 - ☐ Check nickname
 - ☒ Only search primary addresses
 - ☐ Check aliases
 - ☐ Include deceased
 - ☐ Check merged constituents
 - ☐ Include inactive
 - ☐ Check alternate lookup IDs
 - ☐ Include fuzzy search on name
 - ☒ Hide advanced search options
- Results (22 records found):**

Name	Prospect ma...	Primary plan...	Address	City	State	ZIP/Postal co...	Phone	Constituent t...
Buckeye Alpa...		Mr. Douglas...	9601 Kinsma...	Novelty	Ohio	44072-9633		Organization
Buckeye Aut...			1440 Granvill...	Newark	Ohio	43093-0001		Organization
Buckeye Boo...	Mr. Dennis S...	Mr. Dennis S...	921 Chatham...	Columbus	Ohio	43221-2418	(614) 326-33...	Organization
Buckeye Con...			PO Box 16	Wooster	Ohio	44691-0016		Organization

Buttons: Search, Clear, Select, Cancel, Help.

To Search for a Prospect Record:

1. On the navigation bar, click **Prospects**.
2. On the Prospects page, click **Search Prospects**.
3. Enter the prospect's name or other known information in data fields.
4. Select checkboxes for any advanced search options you wish to use.
5. Click **Search**.
6. Click on the name of prospect record you wish to open or select the name to highlight and **Select**. Look for search results where the prospect manager field is blank to avoid selecting group members.

Prospect Management for Fundraisers

Another way to access a prospect record is to open a constituent record and click on **Prospect** from the Constituencies list.

The screenshot shows a constituent record for Mr. Brutus A. Buckeye Sr. (Lookup ID: 00053399). The 'Prospect' tab is highlighted in the top navigation bar. The record displays various tabs including Summary, Contact, Personal Info, Relationships, Revenue, Memberships, Prospect, Education, Documentation and Interactions, Communications, History, Online Documentation, and Attributes. The 'Prospect' tab is currently selected, showing a list of plans with columns for Plan type, Plan name, Plan Manager, Start date, Date added, and Historical?

Once a prospect has been identified, a **Prospect** constituency is added to the Constituencies tab of the Constituent record.

The screenshot shows the 'Constituencies' tab for Mr. Brutus Buckeye (Lookup ID: 00053399). The 'Constituencies' tab is highlighted in the top navigation bar. The record displays various tabs including Summary, Contact, Personal, Relationships, Constituencies, Education, Documentation, Names, Attributes, Smart Fields, and Tributes. The 'Constituencies' tab is currently selected, showing a list of 11 constituencies with columns for Description, Date from, and Date to. The 'Prospect' constituency is highlighted with a red circle.

Description	Date from	Date to
OSUAA Alumni		
Alumnus	6/1/1958	
Committee member		
Donor	6/18/1958	
Event registrant	8/22/2011	
Loyal donor		
Major donor		
Member	7/3/2003	12/31/2050
Planned giver	7/5/2000	
Prospect		
Recognized donor	5/1/1996	12/31/2012

The Prospect Record

The prospect record has several tabs to categorize information related to the prospect. Links in the More information action group on the explorer bar provide access to even more prospect information.

The screenshot displays the 'Floyd, Reese & Kara - Prospect Group - Prospect' record in a web application. The interface includes a top navigation bar with tabs like Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Sponsorship, Fundraising, Treasury, and Web. A left sidebar contains 'Tasks' (Flag prospect, Edit prospect manager, Replace prospect manager, Request prospect manager, Edit prospect status), 'View as' (Constituent), and 'More information' (Revenue and recognition, Communications, Extended network, History, Wealth and ratings, Interactions, Surveys, Documentation summary, Web dashboard pages). The main content area shows a notification for 'Prospect Manager: Jeff Kaplan', a group icon, and details: Group type (Prospect Group), Prospect manager (Mr. Jeff M. S. Kaplan), No. of members (2), Start date (5/12/2011), and Prospect status (Prospect). Below this is a tabbed interface with 'Plans' selected, showing a table of plans. The table has columns for Constituent, Plan type, Plan name, Start date, Date added, and Sites. One plan is listed: 'Floyd, Reese & Kara - Prosp...' with Plan type 'Solicitation', Plan name 'BOT Campaign Solicitation...', Start date '5/16/2012', and Date added '5/16/2012'.

Home ▾ | Constituents ▾ | Marketing and Communications ▾ | Revenue ▾ | Events ▾ | Memberships ▾ | Prospects ▾ | Volunteers ▾ | Foundations ▾ | Sponsorship ▾ | Fundraising ▾ | Treasury ▾ | Web ▾ | >>

Tasks

- Flag prospect
- Edit prospect manager
- Replace prospect manager
- Request prospect manager
- Edit prospect status

View as

- Constituent

More information

- Revenue and recognition
- Communications
- Extended network
- History
- Wealth and ratings
- Interactions
- Surveys
- Documentation summary
- Web dashboard pages

Floyd, Reese & Kara - Prospect Group - Prospect

Notifications: "Prospect Manager: Jeff Kaplan". Click here for more information.

Group type: Prospect Group
Prospect manager: Mr. Jeff M. S. Kaplan
No. of members: 2
Start date: 5/12/2011
Prospect status: Prospect

Active constituencies: Prospect

Plans | Prospect Team | Planned Gifts | Funding Interests | Campaigns | Prospect Manager History | Attributes

Plans (1) Add Request major giving plan

Sites: All sites Include historical plans Apply Reset

Constituent	Plan type	Plan name	Start date	Date added	Sites
Floyd, Reese & Kara - Prospect Group					
Floyd, Reese & Kara - Prosp...	Solicitation	BOT Campaign Solicitation...	5/16/2012	5/16/2012	

Prospect Management for Fundraisers

The **Prospect status** field will display current status of the prospect.

Prospect Status	Description
Suspect	The constituent is believed to be capable of a major gift now of \$50,000 or more (or less as identified by individual units) and has an identified area of interest with OSU.
Future Suspect	The constituent is not currently capable of a major gift but strong indicators for future giving and/or a need to build greater affinity with OSU exist.
Undetermined Suspect	The constituent has been reviewed by Research but is unable to be classified as a major gift suspect at this time. Revaluation will occur in a future screening.
Low Affinity Suspect	Regardless of capacity, the constituent has little known affinity to OSU.
Disqualified	After qualification visit to a pre-qualified (by Research) Suspect, a DO determines the Suspect is not a Prospect.
Prospect	A DO has qualified the constituent as a major gift prospect.
Prospect Group Member	The constituent is a member of a prospect group. Users should navigate to the group record to determine status, PM, and other prospect information.
Former Prospect	The constituent has been removed from active prospect management.
Former Prospect Group Member	The constituent was a member of a prospect group that has been removed from active prospect management. Users should navigate to the group record to view prospect history.

Prospect Management for Fundraisers


Individuals who are part of the prospect management team will have defined roles in the system.


Prospect Management Roles	Description
Prospect Manager	The prospect manager is assigned on the constituent's prospect record and is responsible for overseeing the entire prospect relationship including plans, opportunities, stewardship plans etc.
Prospect Assistant Manager	Works in partnership with the prospect manager to create and implement overall strategies and to facilitate communications among team members.
Prospect Research Manager	Research staff member assigned to this prospect for general tracking purposes. Research manager assignments will made by the director of Development Research.
Prospect Stewardship Manager	Stewardship staff member assigned to coordinate and implement overall stewardship activities for the prospect.
Industry Liaison Manager	Staff member from the Industry Liaison Office assigned to coordinate strong strategic relationships between industry and the university.


Prospect Management for Fundraisers

Plans Tab

The plans tab displays the plan(s) assigned to the selected prospect. You can add plans from this tab.

 **Floyd, Reese & Kara - Prospect Group - Prospect** Floyd, Reese & Kara - Prospect Group - Prospect ▾

 Notifications: "Prospect Manager: Jeff Kaplan". Click here for more information.



Group type: Prospect Group

No. of members: 2

Active constituencies: Prospect

Prospect manager: [Mr. Jeff M. S. Kaplan](#)

Start date: 5/12/2011

Prospect status: Prospect

Plans

Prospect Team






Planned Gifts

Funding Interests


Campaigns



Prospect Manager History


Attributes

Plans (1)  Add ▾  Request major giving plan   

Sites:

All sites ▾ 

☐ Include historical plans  Apply  Reset

Constituent	Plan type	Plan name	Start date	Date added	Sites
Floyd, Reese & Kara - Prospect Group					
 Floyd, Reese & Kara - Prosp...	Solicitation	BOT Campaign Solicitation...	5/16/2012	5/16/2012	

Prospect Team Tab

The Prospect Team tab contains any team members assigned to the prospect. After the prospect record is created, you can add or edit team members on this tab. You can also view the team member's fundraiser record.

Plans

Prospect Team




Planned Gifts

Funding Interests






Campaigns



Prospect Manager History

Attributes

Prospect manager (1)   

Name	Role	Start date	End date	Position site
Mr. Jeff M. S. Kaplan	Prospect manager	5/12/2011		

Prospect team (2)  Add team member  Filters   

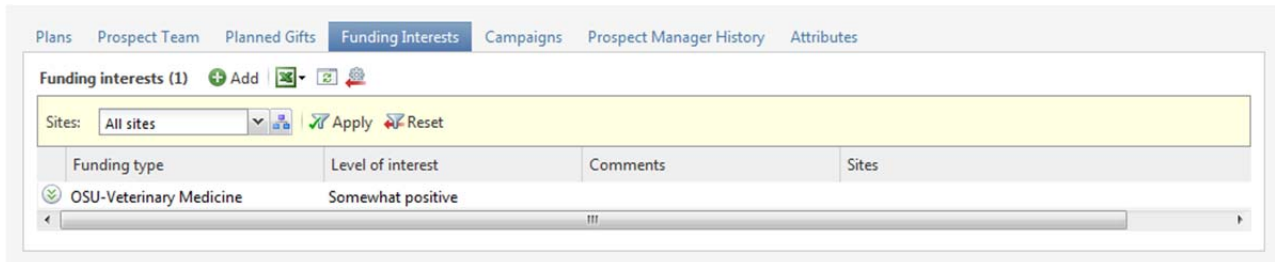
Name	Role	Start date	End date	Position site	Plan name
Primary plan manager - Current					
 Dr. Liesa Rihl Stone	Primary plan manager	5/16/2012			BOT Campaign
Prospect Assistant Manager - Current					
 Dr. Liesa Rihl Stone	Prospect Assistant Manager	3/8/2012			

Planned Gifts Tab

The Planned Gifts tab tracks your organization's planned giving. The records include information specific to numerous types of planned gift vehicles.

Funding Interests Tab

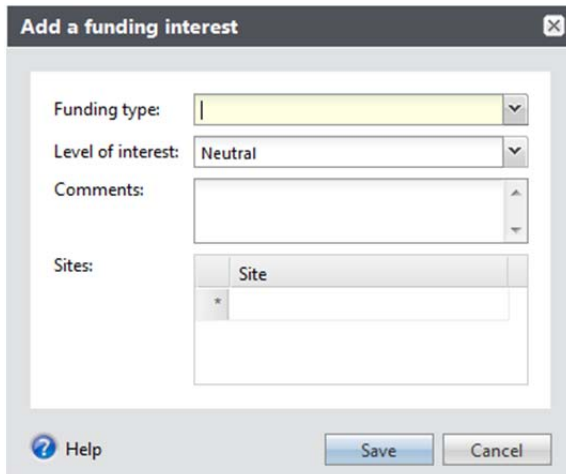
On the Funding Interests tab of a prospect record, you can specify the organizations, affiliations, activities, or pursuits in which a prospect expresses interest. You can then define the degree of the prospect's interest or lack of interest.



The screenshot shows the 'Funding Interests' tab selected in a prospect record. The tab bar includes 'Plans', 'Prospect Team', 'Planned Gifts', 'Funding Interests', 'Campaigns', 'Prospect Manager History', and 'Attributes'. Below the tab bar, there is a section titled 'Funding interests (1)' with an 'Add' button and a list of existing interests. A table below this section shows the details of the interest:

Funding type	Level of interest	Comments	Sites
OSU-Veterinary Medicine	Somewhat positive		

After you define funding interests for the prospect, you can select these interests from the Funding Types tab on an opportunity record. You can use this information when you create steps for solicitors to interact with the prospect.



The screenshot shows the 'Add a funding interest' dialog box. It contains the following fields:

- Funding type:** A dropdown menu.
- Level of interest:** A dropdown menu with 'Neutral' selected.
- Comments:** A text area.
- Sites:** A list box with a 'Site' header and a search field.

At the bottom of the dialog box, there are 'Help', 'Save', and 'Cancel' buttons.

To Add a Funding Interest:

1. Open the prospect record on which to add a funding interest.
 2. Click the Funding Interests tab.
 3. On the action bar, click **Add**. The Add a funding interest tab displays.
 4. In the **Funding type** field, select the type of funding the prospect either has an interest in or has shown a lack of interest in supporting.
 5. In the **Level of interest** field, select the level of interest the prospect has shown in the selected funding type.
 6. Enter any additional details in the **Comments** field.
 7. Click **Save**.
-

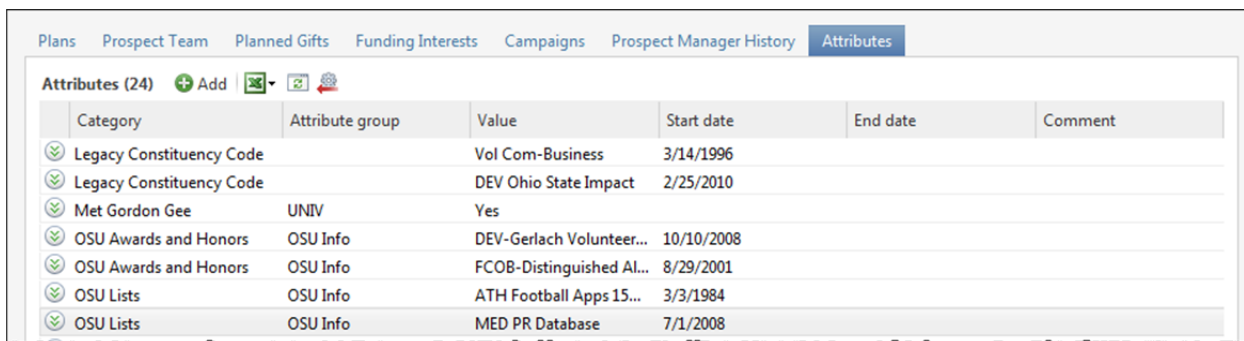
Prospect Management for Fundraisers

Prospect Manager History Tab

The Prospect Manager History tab displays a list of *previous* prospect managers along with the dates they served as a manager for the prospect. On this tab, you can edit the dates associated with the manager or go to the manager's Fundraiser page.

Attributes Tab

The Attributes tab displays attribute values associated with the constituent. It does not contain any data specific to prospect management.



Plans Prospect Team Planned Gifts Funding Interests Campaigns Prospect Manager History Attributes					
Attributes (24) + Add [icon] [icon]					
Category	Attribute group	Value	Start date	End date	Comment
Legacy Constituency Code		Vol Com-Business	3/14/1996		
Legacy Constituency Code		DEV Ohio State Impact	2/25/2010		
Met Gordon Gee	UNIV	Yes			
OSU Awards and Honors	OSU Info	DEV-Gerlach Volunteer...	10/10/2008		
OSU Awards and Honors	OSU Info	FCOB-Distinguished Al...	8/29/2001		
OSU Lists	OSU Info	ATH Football Apps 15...	3/3/1984		
OSU Lists	OSU Info	MED PR Database	7/1/2008		

Navigation Tree

The navigation tree is an efficient way to view multiple, nested pages of information. The navigation tree displays information as an expandable, hierarchical set of links to other pages.

For example, you can open a fundraising purpose and get a broad view of all the activities involved by displaying links to all of the associated appeals.

If a navigation tree is available, it is collapsed on the top-right side of the page. To expand the navigation tree, position your cursor over the navigation tree button.

Prospect Management for Fundraisers

Click to expand or collapse the Navigation Tree view.

Floyd, Reese & Kara - Prospect Group - Prospect

Notifications: "Prospect Manager: Jeff Kaplan". Click here for more information.

Group type: Prospect Group
Prospect manager: Mr. Jeff M. S. Kaplan
No. of members: 2
Start date: 5/12/2011
Prospect status: Prospect

Active constituencies: Prospect

Plans Prospect Team Planned Gifts Funding Interests Campaigns Prospect Manager History Attributes

Plans (1) + Add + Request major giving plan [X] [2] [3]

Sites: All sites [v] [i] Include historical plans [v] Apply [X] Reset

Constituent	Plan type	Plan name	Start date
Floyd, Reese & Kara - Prospect Group			
Floyd, Reese & Kara - Prosp...	Solicitation	BOT Campaign Solicitation...	5/16/2012

Navigation Tree:

- Floyd, Reese & Kara - Prospect Group - Prospect
 - Prospect Plans
 - Solicitation (Dr. Liesa Rihl Stone)
 - Steps
 - 05/17/12 - Strategize with CVM campaig
 - 07/31/12 - Discussion surrounding gift p
 - 01/31/13 - Leadership (LK/JK) meeting to
 - 04/04/13 - Tour and engagement of lead
 - 06/28/13 - Proposal Preparation
 - 08/28/13 - Formal Solicitation
 - 10/31/13 - Ask follow-up
 - 07/10/12 - Visit to introduce and update
 - Opportunities
 - Qualified
 - Planned Gifts
 - Solicitation (Mr. Peter B. Weiler)
 - Steps
 - 10/15/08 - Accepted
 - Opportunities
 - 10/15/08 - Accepted
 - Planned Gifts

With the tree open, you can expand and collapse nested groups by clicking the plus and minus icons next to the page. You can access any listed page by clicking the appropriate link.

Wealth and Ratings

The Wealth and Ratings page for each constituent displays the wealth data you have gathered for that constituent.

To Access a Constituent's Wealth and Ratings Page:

1. Open the constituent's record.
 2. In the explorer bar, click **Wealth and ratings**.
-

Three frames of information make up the Wealth and Ratings page: Modeling and propensity, Wealth summary, and Wealth Capacity.

Prospect Management for Fundraisers

The screenshot displays the 'Wealth Summary' tab for a constituent named Brutus Buckeye. The interface includes a top navigation bar with tabs like Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Fundraising, and Analysis. A left sidebar shows the constituent's profile and various roles. The main content area is divided into several sections: Wealth Summary (Last update: 9/12/2012), Giving capacity (System), Model scores and ratings (7), and Research details. The Wealth Summary section contains a table with columns for Assets, Total identified, Confirmed, Other indicators, Total identified, and Confirmed. The Giving capacity section shows the Capacity formula, Estimated wealth, Major giving capacity, and Overall rating. The Model scores and ratings section shows a table with columns for Name, Score, Maximum score, and Updated on. The Research details section shows the Research status and Prospect manager.

Brutus Buckeye
1480 W Lane Ave
Columbus, OH 43221
(123) 456-7890
Spouse: Ms. Becky Buckeye
Household: Ms. and Mr. Becky Buckeye
Primary business: The Ohio State University
Primary education: The Ohio State University

Wealth summary (Last update: 9/12/2012)

Assets	Total identified	Confirmed	Other indicators	Total identified	Confirmed
Real estate:	\$122,243,991.00	\$4,442,003.00	Wealth indicators:	15	0
Businesses:			Biographical data:	1	1
Securities:	\$118,327.00	\$118,327.00	Political donations:	94	0
Income/compensation:			Philanthropic gifts:	75	16
Other assets:			Nonprofit affiliations:	18	0
Total assets:	\$122,362,318.00	\$4,560,330.00	Foundation affiliations:	1	0

Giving capacity (System)

Capacity formula: IRS-Data research estimation
Estimated wealth: \$10,000,001 and up
Major giving capacity: \$500,001 - \$1,000,000
Overall rating:

Asset distribution for Brutus Buckeye

Confirmed

Model scores and ratings (7)

Name	Score	Maximum score	Updated on
Annual Giving Like...	999	1000	10/8/2012
Annuity Likelihood	944	1000	10/8/2012
Bequest Likelihood	980	1000	10/8/2012
CRT Likelihood	1000	1000	10/8/2012
Major Giving Likeli...	984	1000	10/8/2012
Target Gift Range	\$500,001 - \$1,000,0...	\$1,000,001 +	10/8/2012
Past Giver Type	Regular		9/26/2012

Research details

Research status: Not confirmed Prospect manager: <unassigned>
Research summary: <none>

Wealth Summary Tab

The Wealth Summary tab summarizes all data contained on the Model Scores, Assets, Giving, Affiliations, and Biographical Information tabs in an organized, easy-to-read format.

Note: It is important to remember that often information displayed on these tabs may be electronically imported from *WealthPoint*, a screening service purchased from Blackbaud Target Analytics. *WealthPoint* data may or may not be accurate and complete and will need to be reviewed by a prospect research analyst before use.

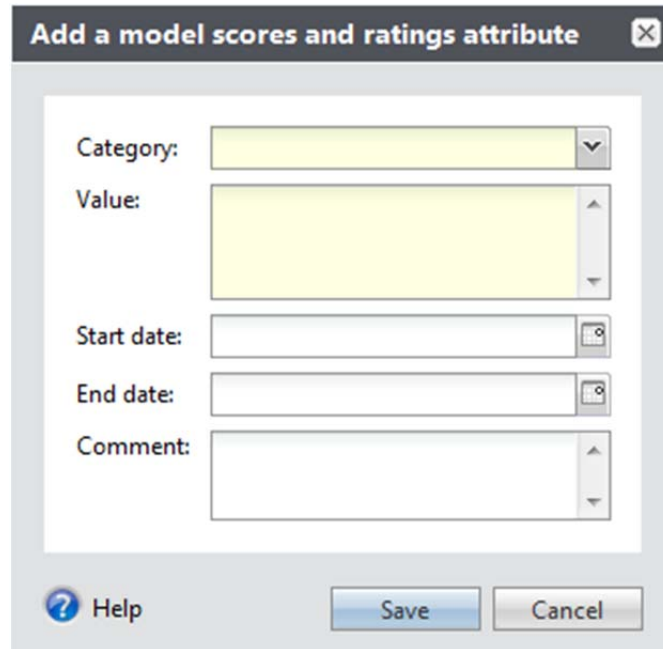
Model Scores Tab

The Modeling and propensity frame displays the modeling and propensity custom ratings assigned to the constituent. The custom ratings are based on attribute categories.

To Manage Custom Ratings via the Constituent Record:

1. Open the constituent's Wealth and Ratings page
2. Select the **Model scores** tab.
3. On the action bar, click **Add**.

Prospect Management for Fundraisers



4. In the **Category** field, select a category from the list.
5. In the **Value** field, enter a value for the attribute.
6. Enter start and end dates in the corresponding fields.
7. In the **Comments** field, enter any additional information about the attribute.
8. Click **Save**.

Glossary of terms appearing in the Model Scores and Ratings section for individual records (not all records will contain every term).

Terms	Description
Likelihood Models Look at the inclination a prospect has to make a gift to The Ohio State University. Excluding Target Gift Range does not predict gift size. Scores range from 0 to 1000 with higher scores translating to better prospects.	
Annual giving likelihood	Predicts the likelihood of each individual to give a gift every year to The Ohio State University.
Annuity likelihood	Predicts the likelihood to give a charitable gift annuity to The Ohio State University.

Prospect Management for Fundraisers

Terms	Description
Bequest likelihood	Predicts the likelihood to give a bequest gift to The Ohio State University.
CRT likelihood	Predicts the likelihood to give a charitable remainder trust gift that benefits The Ohio State University
Target Gift Range	Predicts the amount an individual is likely to give to The Ohio State University on annual basis.
Major giving likelihood	Predicts the likelihood of an individual to be major donor. This code was developed by Prospect Research & Reporting Services in August 2009 using internal data. A major donor was defined as someone that can give \$50,000 over the course of five years.
Ratings Provide an estimate of capacity to give to Ohio State.	
UD Campaign Rating	An estimate of the prospect's giving potential during the current university campaign, encompassing all gift types.
UD Lifetime Rating	An estimate of the prospect's lifetime, or ultimate, giving potential, encompassing all gift types.
UD Annual Rating	An estimate of the prospect's annual giving potential.
UD Planned Giving Rating	An estimate of the prospect's gift potential through their estate or other planned gift vehicle(s).
UD Research Rating	An estimate provided by Prospect Research team members from their analysis of all wealth indicators obtained from a variety of sources. This figure is a capacity for giving to all philanthropic interests over a period of five years.
Electronic Wealth Screening Scores:	
GGA Major Gift Capacity	A calculated gift capacity estimate provided by an electronic vendor screening of all Ohio State University alumni in January 2010.

Prospect Management for Fundraisers

Assets Tab

This tab identifies hard asset indicators usually obtained from public records such as real estate and stock holdings. You can also view wealth indicator and income/compensation information. Each item receives a Confidence Rating from 1-5, with 5 being the most likely to be a correct match to that individual.

You can click any link in the Wealth assets grid and the application takes you to that section of the tab page. A **Refresh** button is also included in the Wealth assets grid, allowing you to make sure you are looking at the most up-to-date data available.

Wealth Summary Model Scores Assets Giving Affiliations Biographical Information					
Wealth assets (Last update: 9/12/2012)					
Asset	Total identified	Confirmed	Asset	Total identified	Confirmed
Real estate:	\$122,243,991.00	\$4,442,003.00	Wealth indicators:	15	0
Businesses:			Income/compensation:		
Securities:	\$118,327.00	\$118,327.00	Other assets:		
Expand all Collapse all					
⌵ Real estate - Total identified: \$122,243,991 Total confirmed: \$4,442,003 (86)					
⌵ Businesses - Total identified: \$0 Total confirmed: \$0 (0)					
⌵ Securities - Total identified: \$118,327 Total confirmed: \$118,327 (2)					
⌵ Wealth indicators - Total identified: 15 Total confirmed: 0 (15)					
⌵ Income/compensation - Total identified: \$0 Total confirmed: \$0 (0)					
⌵ Other assets - Total identified: \$0 Total confirmed: \$0 (0)					

Giving Tab

The Giving tab displays information about the prospect's giving to yours and other non-profit organizations.

You can click any link in the Giving summary grid and the application takes you to that section of the tab page. Click the **Refresh** button to make sure you are looking at the most up-to-date data available.

You can also view the Philanthropic giving category breakdown grid to see a percentage and number breakdown of this prospect's giving tendencies based on giving categories associated with the donations. You can filter the data considered for this breakdown based ratings assigned each gift

Prospect Management for Fundraisers

The screenshot shows the 'Giving' tab with a summary table and a category breakdown.

Giving type	Total identified	Confirmed
Philanthropic gifts:	75	16
Political donations:	94	0

Philanthropic giving category breakdown (1 and above):

- 31% Arts, Culture, Humanities 31
- 18% Higher Education 18
- 10% Youth Development 10
- 9% Religion Related, Spiritual De... 9
- 5% K-12 Education 5
- 27% Additional Categories 27

Expand all Collapse all

Philanthropic gifts - Total identified: \$30,871 Total confirmed: \$16,000 (75) Filters

Political donations - Total identified: \$36,736 Total confirmed: \$0 (94) Filters

Affiliations Tab

The Affiliations tab displays information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.

You can click any link in the Affiliations summary grid and the application takes you to that section of the tab page. You can also view the **Relationship Map** to track all relationships this constituent has with other constituents in your system

The screenshot shows the 'Affiliations' tab with a summary table and a relationship map.

Affiliation type	Total identified	Confirmed
Nonprofit affiliations:	18	0
Foundation affiliations:	1	0
Network connections:	0	0

Relationship map

Mr. Brutus Buckeye (Prospect)

Expand all Collapse all

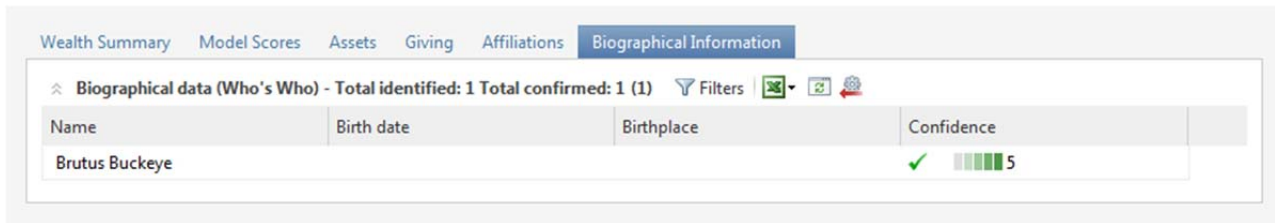
Nonprofit affiliations - Total identified: 18 Total confirmed: 0 (18) Filters

Foundation affiliations - Total identified: 1 Total confirmed: 0 (1) Filters

Network connections - Identified connections: 0 Known connections: 0 (0) Filters

Biographical Information Tab

The Biographical Information tab displays information such as name, address, gender, and birth information. From this tab, you can add, edit, delete, reject, and confirm the constituent's biographical information. The tab also stores information from Marquis Who's Who imported from **WealthPoint**.



Wealth Summary Model Scores Assets Giving Affiliations Biographical Information			
⌕ Biographical data (Who's Who) - Total identified: 1 Total confirmed: 1 (1) Filters [Export] [Refresh] [Add]			
Name	Birth date	Birthplace	Confidence
Brutus Buckeye			✓ [5 bars] 5

Fundraisers

Fundraisers are the people who are involved with a prospect's management, including planning, cultivation, and solicitation stages. Fundraisers in TAS may include development officers, advancement staff, deans, directors, faculty, volunteers, and others.

View Fundraisers

You can access the Fundraiser page from a number of locations in Prospects and other areas of the program.

From the navigation bar Prospects drop-down menu:

- Select **Search fundraisers**. The Fundraiser Search window displays.
- Enter your search criteria.
- Click **Search**. All possible matches display in the Results grid.
- Select the fundraiser you want to view.
- Click **Select**. The record opens.

From the Prospects page:

- Click **My Fundraiser page**. (The fundraiser constituent must be linked to your application user in the system.)

The Fundraiser Record

The fundraiser record tracks individual fundraiser information. On this page, you can view a summary of the fundraiser's prospects and where they stand in the process, step and opportunity information, prospect plan assignments, and more.

Pending Steps Tab

On the Pending steps tab, you track steps not yet complete with a status of **Pending**. Steps with a status of Planned do not appear on this tab.

On this tab, you can edit the step, mark the step as complete, go to the step, or delete the step. You can also view prospect plans and notes associated with the pending step.

←

Pending Steps

⚠ Prospects and Plans

Grants

Planned Step Summary

Completed Step Summary

Prospect Summary

Opportunities and Asks

→

Pending steps (5)

Sites:

All sites

▼

☐ Only show steps owned by this fundraiser

Apply

Reset

	Prospect	Expected da...	Objective	Plan type	Plan stage	Owner	Contact me...	Has docum...	Additional s...	Sites
61+ days ago										
	Ms. Ami G...	1/5/2012	Ask follow-up	Solicitation	Closure	Mr. Alain Sc...	Electronic			
	Mr. Robert S...	4/23/2012	Connect Sc...	Solicitation	Stewardship	Mr. Alain Sc...	Telephone			
	Mr. Edward...	8/29/2012	Dinner meet...	Solicitation	Qualification	Mr. Alain Sc...	Personally S...			
31-60 days ago										
	Dr. John I...	8/30/2012	Intro. mtg...	Solicitation	Early Cultiva...	Mr. Alain Sc...	Personally S...			
	Mr. Alan Da...	9/1/2012	Confirmed -...	Solicitation	Early Cultiva...	Mr. Alain Sc...	Personally S...			

Prospects and Plans Tab

On the Prospects and Plans tab, the top section tracks all prospect plans to which the fundraiser is connected. The bottom half of the tab, the Prospect manager assignments section, tracks all prospects to which the fundraiser is connected as a prospect manager or prospect team role.

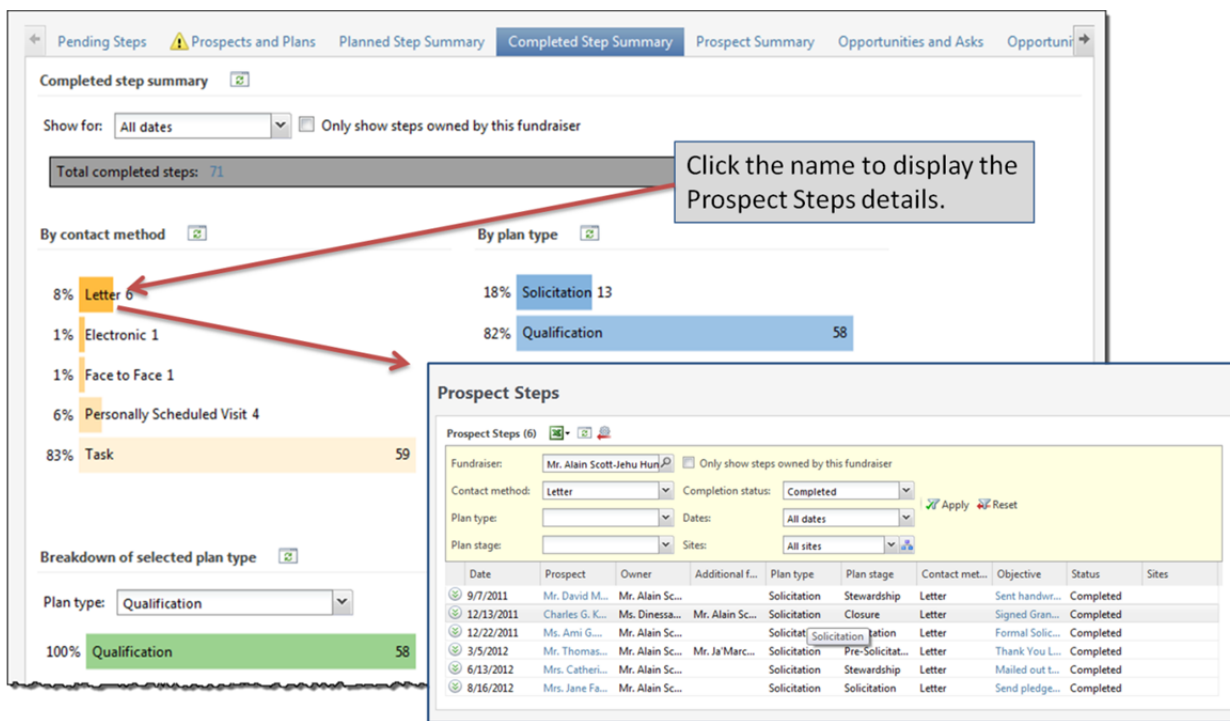
Prospect Management for Fundraisers

In the **Show for** field, select the number of days for which you want to view planned step information. For example, if you want to see how many steps you planned for the next seven days, select **Next 7 days**.

To see information about a specific step, click the name and the Prospect Steps page displays. On this page, you can go to the selected step, plan, or prospect.

Completed Step Summary Tab

The Completed Step Summary tab tracks information about your completed prospect steps both statistically and graphically. Steps are exclusive to prospect plans, and general interactions filed by the fundraiser are not included in these summaries.



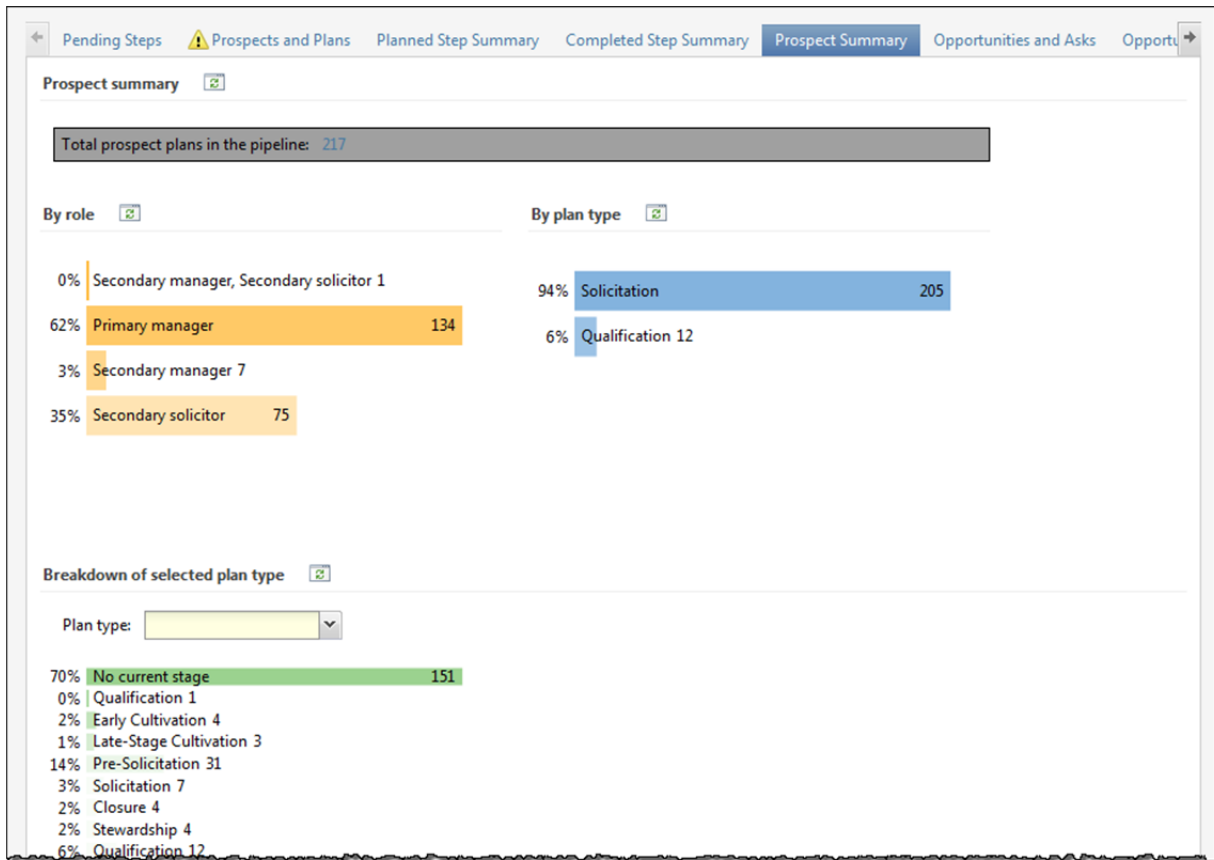
In the **Show for** field, select the number of days for which you want to view completed step information. For example, if you want to see how many steps you completed in the last thirty days, select **Last 30 days**.

To see information about a specific step, click the name and the Prospect Steps page displays. On this page, you can go to the selected step, plan, or prospect.

Prospect Summary Tab

The Prospect Summary tab helps you track the number of prospects in your pipeline, both statistically and graphically. ***If you are not regularly using steps within prospect plans for all prospects, this information may be incomplete or irrelevant.***

Prospect Management for Fundraisers



The gray bar near the top of the tab displays the total number of prospects plans assigned to you. The number of **Plan type** grids and corresponding graphs displayed depend on the number of plans currently assigned to your prospects. The grids let you know the plan stage of each prospect, along with the total number of prospects assigned the plan.

To see a list of prospects included in a Plan stage, click the name of the stage in the list. The Prospects page displays. From this page, you can go to a selected prospect's plan or prospect.

Opportunities and Asks Tab

The Opportunity and Asks tab tracks the opportunities (asks) assigned to you, including planned, pending and completed solicitations. This tab only displays opportunities for plans to which you are assigned as primary manager (i.e., secondary assignments are not included on this tab).

Prospect Management for Fundraisers

Summary of opportunities and asks

Plan type:

Overdue

Overdue asks: \$0.00 in 0
Overdue responses: \$0.00 in 0

Outstanding

Show for: All dates
10/30/2012 to 10/30/2012

Qualified: \$8,540,000.00 in 35
Unqualified: \$1,205,000.00 in 7
Response pending: \$1,935,000.00 in 5
Total: \$11,680,000.00 in 47

Completed

Show for: All dates
10/30/2012 to 10/30/2012

Accepted: \$28,240,536.46 in 101
Canceled: \$14,500,000.00 in 37
Rejected: \$3,377,000.00 in 19
Total: \$46,117,536.46 in 157
Total revenue committed: (Gifts and pledges) \$0.00 in 0
Total paid: (Gifts and pledges paid) \$0.00 in 0

- You can filter the data displayed on the tab based on Plan type.
- In the Overdue section, you can view the number of your Overdue asks and Overdue responses.
- Overdue is considered anything before today's date.
- In the Completed section, you can view the dollar amount and number of Accepted, Rejected, and Total asks. Using the **Show for** field, you can select the time period for which you want to view data.
- In the Outstanding section, you can filter the data displayed using the **Show for** field.

Opportunity Pyramid Tab

Ohio State does not currently utilize this feature.

Campaigns Tab

Ohio State does not currently utilize this feature.

Prospect Requests Tab

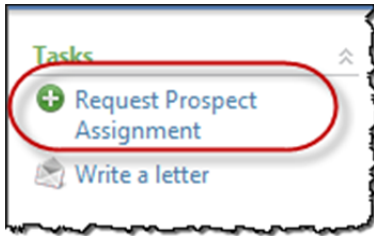
Ohio State does not currently utilize this feature.

Requesting Prospect Assignment

Request Prospect Assignment for Non-Prospects

Prospect manager assignment may be requested for constituents who are not actively assigned as prospects.

Prospect Management for Fundraisers



To Submit a Prospect Assignment Request for Constituents with No Assignment:

1. Search for and open the constituent record for which you want to submit a prospect assignment request.
 2. Click **Request Prospect Assignment** in the Task list on the left side of the page.
 3. Search for and select the fundraiser you want to request as the assigned prospect manager.
 4. Enter the additional information necessary and applicable for this request.
 5. Click **Save**. The request is sent to a queue to be reviewed.
-

Requests for prospect assignment for constituents who are not yet flagged as prospects can be submitted via the constituent record. Requests are reviewed by prospect coordinators for approval.

Prospect Management for Fundraisers

The screenshot shows the 'Blackbaud Enterprise CRM' window with the following fields and callouts:

- A** points to the 'Prospect:' field, which contains the text 'Ann M. Hirzel'.
- B** points to the 'Prospect Manager:' field, which is empty.
- C** points to the 'Strategy:' field, which is empty.
- D** points to the 'Personal visit completed ? :' field, which has a dropdown menu set to 'No'.
- E** points to the 'No Contact Reason:' field, which is empty.
- F** points to the 'Qualified By:' field, which is empty.
- G** points to the 'Qualification Date:' field, which is empty.
- H** points to the 'Ratings' section, which includes four dropdown menus: 'Campaign Rating:', 'Lifetime Rating:', 'Planned Giving Rating:', and 'Annual Rating:'.
- I** points to the 'Prospect Team' section, which includes a table with columns 'Name' and 'Role'.

At the bottom of the window are 'Save' and 'Cancel' buttons.


- A. The name of the constituent displays.
- B. Search for and select the constituent record of the fundraiser who is requesting assignment (as this request may be submitted by an assistant, etc.)
- C. Enter a narrative to describe the current strategy or goal for the prospect. For example, "Cultivate for gift to Gee Scholarship fund."
- D. Enter whether or not a personal visit has been completed.
- E. If the personal visit has not been completed, enter a reason why there was no contact.

Prospect Management for Fundraisers

- F. Search for and select the fundraiser who qualified the prospect.
- G. Enter the date the prospect was qualified.
- H. Enter campaign, lifetime, planned giving, or annual ratings as applicable.
Note: These values are tracked in Modeling and Propensity of the constituent's wealth ratings.
- I. If you know the identities of the prospect team members in advance, enter them here.


View Assignment Request


Prospect coordinators review the list of submitted assignment requests. The request can be accepted or denied and an explanation is added.




Prospect Assignment Requests

Requests (40)

 Filters





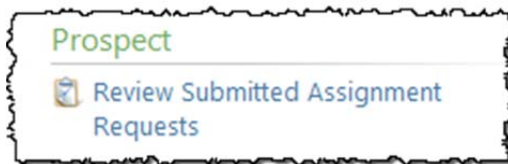
Page 1 of 2

« First < 1 2 > Last »

Date	Requestor	Requested Prospect	Status	Status Date	Entered By
Pending					
10/8/2012	Mitchell H. Straub	Buckeye Ford Mercury...	Pending	10/8/2012	ISLAND\straub
10/8/2012	Rachel M. Childress	Gilbert E. Pierce	Pending	10/8/2012	ISLAND\childress
10/8/2012	Rachel M. Childress	Todd M. Clark	Pending	10/8/2012	ISLAND\childress
9/19/2012	Tanya R. McDay	Cynthia S. Solomon	Pending	9/19/2012	ISLAND\mcday
9/19/2012	Tanya R. McDay	Doc Lamberjack	Pending	9/19/2012	ISLAND\mcday
Accepted					
10/8/2012	Rachel M. Childress	Earley, Michael & Tere...	Accepted	10/8/2012	ISLAND\childress
10/8/2012	Raymont L. Harris	Kenneth R. Reynolds	Accepted	10/8/2012	ISLAND\harris.158
10/8/2012	Rachel M. Childress	Jeffrey J. Walline	Accepted	10/8/2012	ISLAND\childress

To Review Assignment Requests:

1. On the Prospect page, click **Review Submitted Assignments**.



Prospect Management for Fundraisers

Requesting Assignment Transfers

In order to transfer assignment from one Prospect Manager to another, an email should be sent to the Manager of Prospect Tracking. Transfers should be discussed between current and future PMs prior to the email request.


Requesting Prospect Dismissal (Removing from portfolio)

In order to remove a prospect from a fundraiser's portfolio, an email should be sent to the Manager of Prospect Tracking. Along with the request, a brief rationale for the removal should be included; this rationale will be recorded as a task along with the dismissal.

The Prospect Plan Record

A prospect plan tracks the prospect's plan activity including step details, ask opportunities and fundraisers associated with the prospect plan. On the prospect plan record, you can view steps, mark steps "Complete," edit a step, and more.

Floyd, Reese & Kara - Prospect Group

 **Solicitation - BOT Campaign Solicitation #2**

Floyd, Reese & Kara - Prospect Group - Prospect ▾

Prospect manager: Mr. Jeff M. S. Kaplan

Start date: 5/12/2011

Current plan stage: Early Cultivation

Plan start date: 5/16/2012

Plan participants:

Primary manager: Dr. Liesa Rihl Stone

Start date: 5/16/2012

Total qualified opportunity amount: \$1,000,000.00

Secondary solicitors:

Secondary manager:

Start date:

Accepted opportunity amount: \$0.00

Site:

Details

Opportunities

Solicitors and Participants

Documentation

Manager History








Narrative

Edit

Planned and pending steps (7)


Edit steps

Add step

Status	Date	Start time	End time	Time zone	Ow...	Objective	Stage	Contact method	Has document
 Pending	5/17/2012				Dr....	Strategize with...	Early Cultivation	Internal Meeting	
 Planned	7/31/2012				Dr....	Discussion surr...	Early Cultivation	Internal Meeting	
 Planned	1/31/2013				Dr....	Leadership (LK...	Early Cultivation	Internal Meeting	
 Planned	4/4/2013				Dr....	Tour and enga...	Late-Stage Cult...	Personally Sch...	
 Planned	6/28/2013				Dr....	Proposal Prepa...	Late-Stage Cult...	Task	
 Planned	8/28/2013				Dr....	Formal Solicita...	Pre-Solicitation	Personally Sch...	
 Planned	10/31/2013				Dr....	Ask follow-up	Closure	Personally Sch...	

Completed steps (1)

Add step

Status	Date	Start time	End time	Ow...	Objective	Stage	Contact method	Has document...	Additional soli
 Completed	7/10/2012			Dr....	Visit to introdu...	Early Cultivation	Personally Sch...		

To Access a Prospect Plan:

1. Open the prospect record. If a constituent is a member of a prospect group, be sure to start from the prospect group record.
 2. Click the **Plans** tab.
 3. Click the name of the Plan to open. The prospect plan record displays.
-

Prospect Management for Fundraisers

Add a Prospect Plan

The Add a prospect plan window contains a Details tab and a Steps tab. These tabs contain similar fields and options as the Plan tab on the Add a prospect window discussed previously in this lesson.

Details Tab

Add prospect plan for Mr. Brutus Buckeye

Details Steps

Plan information

Plan name: (A)

Plan type: (B) Start date: (B)

Sites:

Site
*

 (C)

Narrative: (D)

Assigned fundraisers

Primary manager: (E) Start date: (E)

Secondary manager: (F) Start date: (F)

Secondary solicitors:

Secondary solicitor	Role	Start date
*		

 (G)

Plan participants

Plan participants:

Plan participant	Role
*	

 (H)

Help Save Cancel

- A. Name the plan assigned to this prospect.
- B. Select the type of prospect plan and start date to assign this prospect. See table below for available plan types and definitions.
- C. OSU does not use Sites, so leave this field blank.
- D. Enter any comments or notations that may help your colleagues to understand the plan.
- E. Click the magnifying glass to search for the primary manager to assign this plan and enter a start date. The Primary Manager has the primary responsibility for the success of the plan and is the person most directly responsible for carrying out this plan. The Primary Manager may be, but is not required to be, the same as the Prospect Manager.
- F. Click the magnifying glass to search for the secondary manager to assign this project and enter the start date (only when you need to document the involvement of additional OSU personnel, including development officers and other staff).
- G. In the Secondary solicitors column, click the binoculars to search for the secondary solicitor to assign this project. In the Role column, select the solicitor's role (only when you need to document the involvement of additional OSU personnel, including development officers and other staff).

Prospect Management for Fundraisers

- H. In the Plan participants column, click the binoculars to search for the constituent participants. In the Role column, select each participant's role. Plan participants are only necessary when attempting to qualify which specific prospect group members are involved and/or solicited in this plan, or when other key external constituents are involved.
- I. If you do not need to add any step outlines, click "Save."

Steps Tab

You can add a pre-set series of plan steps, called a plan outline, for certain functions.

Add prospect plan for Mr. Brutus Buckeye

Details Steps

Outlines: Gift Cycle Add steps from plan outline

Steps

Select all Clear all Update status to: Insert Delete Edit additional details

Expec...	Expec...	Expec...	Time z...	Objective	Owner	Stage	Status	Actu.	Contact method	Category	Subcat...	A
12/29/2...				Initial Visit		Early Cultivation	Planned		Personally Schedul...			
7/2/2014				Strategy/ad...		Late-Stage Cultiva...	Planned		Task			
12/29/2...				Refine ask d...		Pre-Solicitation	Planned		Task			
12/29/2...				Evaluate ste...		Pre-Solicitation	Planned		Task			
2/27/2015				Formal Solic...		Solicitation	Planned		Personally Schedul...			
4/18/2015				Ask follow-up		Closure	Planned		Task			

Adjust expected dates: Forward 1 Day(s) Adjust dates

Help Save Cancel

- A. In the Outline menu on the Steps tab, select the type of prospect plan to assign to the prospect. Click **Add steps from plan outline** to populate the plan steps in the grid.
- B. The steps from the plan outline default into the grid.
- C. You can adjust all the dates in the Expected date column forward or backward by a certain number of days, weeks, months, or years.

To Add a Prospect Plan to an Existing Prospect:

1. Open the prospect record on which to add a plan.
2. Click the **Plans** tab.
3. On the action bar, click **Add, Add major giving plan**. The Add prospect plan for <constituent> window displays.
4. On the Details tab, enter the plan information, assigned fundraisers, and plan participants.

Prospect Management for Fundraisers

5. On the Steps tab, select the type of prospect plan to assign the prospect.
6. Click **Save**.

Plan Type	Description
Solicitation	Standard gift cycle moving prospect from cultivation through solicitation and closure.
Stewardship	Captures work related to general stewardship of the prospect, especially when no plans exist to solicit in the near future.
Probate Management	Used exclusively by the Office of Gift Planning; captures work related to booking planned gifts and dealing with estates in probate.
Volunteer Engagement	Used exclusively by the Campaign Office to track volunteer activities of high-level donors and prospects.
Qualification	Captures work completed to qualify a constituent as a prospect; created automatically at the time of initial assignment.
ILO: Sponsored Research Project ILO: Relationship Development ILO: Community Relations ILO: Student Engagement	Used exclusively by the Industry Liaison Office; captures work related to developing strategic partnerships between industry and the university.

Plan Assignments	Description
Primary Manager	Primary manager of the plan.
Secondary Manager	Development officer providing significant assistance with the plan, and/or other OSU personnel (such as deans, directors, faculty, and staff).
Secondary Solicitor / Internal Partner	Development officer(s) providing significant assistance with the plan, and/or other OSU personnel (such as deans, directors, faculty, and staff).
Secondary Solicitor / Volunteer	Board or committee members and/or other volunteers.


Prospect Management for Fundraisers

Plan Assignments	Description
Participant Role	
Key Influencer	Any constituent that has a great amount of influence on the prospect or prospect group but is not a professional advisor or volunteer.
Professional Advisor	Constituent, such as attorney or estate planner, advising the prospect.

The Opportunity Record

On an opportunity record, you can view and manage detail information about the opportunity.

Floyd, Reese & Kara - Prospect Group > Solicitation

 **\$1,000,000.00 (Qualified) - Opportunity**

Floyd, Reese & Kara - Prospect Group - Prospect ▾

Current stage:
Early Cultivation

Prospect manager:
[Mr. Jeff M. S. Kaplan](#)

Start date:
5/16/2012

Primary manager:
[Dr. Liesa Rihl Stone](#)

Start date:

Secondary manager:

Start date:
5/12/2011


Details

Associated Revenue

Naming Opportunities

Campaigns

Attributes

Opportunity details 

Status: Qualified

Opportunity type: Goal Setting

Expected ask amount: \$1,000,000.00

Expected ask date: 8/31/2012

Actual ask amount: \$0.00

Actual ask date:

Likelihood: Moderately likely (60%)




Response date:

Accepted amount: \$0.00




Total paid amount: \$0.00

Revenue committed: \$0.00

Comments:

Designation (1)   

Name	Amount	Constituent
Academic Excellence Fund - 620065	\$0.00	

Funding types (0)   

Funding type	Prospect's interest level

Prospect Management for Fundraisers

To Access an Opportunity Record:

1. Open the constituent's prospect record.
 2. Select the Plans tab.
 3. Click the name of the plan where the opportunity is to be added. The plan record opens.
 4. Select the **Opportunities** tab.
 5. In the frame with the opportunity to open, click **Go to opportunity**.
-

Open the opportunity on your prospect's Major Giving Plan and review the information on the tabs.

Tab Name	Information
Details tab	The Details tab displays information about the opportunity and any designations associated with the opportunity.
Associated Revenue tab	The Associated Revenue tab displays revenue information associated with the opportunity.
Naming Opportunities tab	The Naming Opportunities tab displays naming opportunities associated with the opportunity. You can add, edit, and delete naming opportunities on this tab.
Campaigns tab	The Campaigns tab displays campaigns and designations associated with the opportunity.

Add Opportunities

On the Opportunities tab of a plan record, you can add information about opportunities to help you better track prospect steps and gift requests.

Prospect Management for Fundraisers

Add opportunity for Floyd, Reese & Kara - Prospect Group

Plan name: BOT Campaign Solicitation #2 Plan type: Solicitation

Status: Opportunity type:

Expected ask amount: Expected ask date:

Ask amount: Ask date:

Likelihood:

Accepted amount: Response date:

Designati...	Amount	Constitue...	Funding...	Category	Type	Use code
*						

Distribute evenly

Comments:

Help Save Cancel

- A. Select a status for the opportunity.
- B. Enter the amount you plan to request from the prospect.
- C. Enter the actual amount you asked for. This field is not activated if the opportunity's Status is "Unqualified."
- D. Rate the likelihood of receiving the entered amount from this prospect.
- E. Enter the amount the prospect agreed to give. This field is activated when the opportunity status is "Accepted."
- F. Select the opportunity type.
- G. Enter the date you plan to ask for a gift.
- H. Enter the date you asked for the amount entered in the **Ask amount** field.
- I. Enter the date the prospect agreed to the amount entered in the **Accepted amount** field.
- J. In the Designation column, specify the designation to which you want the money distributed. In the Amount column, enter the amount of the gift you want allocated to the corresponding designation.

Prospect Management for Fundraisers

K. Enter any comments or notes related to the opportunity.

Opportunity Status	Description
Unqualified	Rough estimates of ask date and amount exist; specific designations are likely unknown.
Qualified	Ask date, amount, and designations are being finalized.
Response Pending	An ask has been made for support of this opportunity.
Accepted	The prospect has responded and indicated that they will make the gift to this opportunity.
Rejected	The prospect has responded and indicated that they will not make a gift in response to this opportunity.
Cancelled	After cultivating the prospect and perhaps even preparing a proposal, you determine that the ask will not be made.

To Add an Opportunity to a Prospect's Plan:

1. Open the prospect record.
 2. Select the **Plans** tab.
 3. Click the name of the plan where the opportunity is to be added. The plan record opens.
 4. On the Plan page, select the **Opportunities** tab.
 5. On the action bar, click **Add**.
 6. Complete the fields and options on the **Add opportunity** window.
 7. Click **Save**.
-

Edit Opportunities

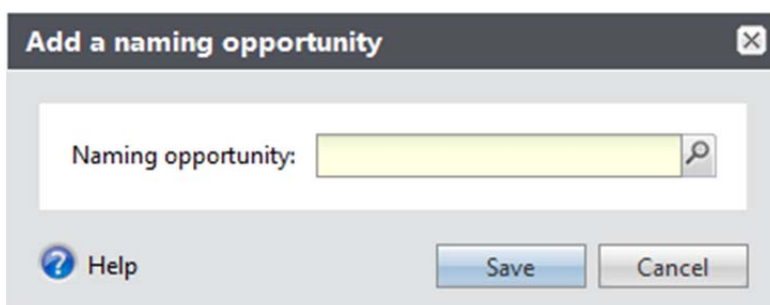
You will update opportunity records as you progress through the phases of moves management with prospects. For example, the status of an opportunity may move from Unqualified, to Qualified, to Response pending, then to Accepted.

To Edit an Opportunity:

1. Open the prospect record.
 2. Select the **Plans** tab.
 3. Click the name of the plan where the opportunity is to be added. The plan record opens.
 4. On the Plan page, select the **Opportunities** tab.
 5. In the frame with the opportunity to edit, click **Edit**.
 6. Make necessary changes to the opportunity.
 7. Click **Save**.
-

Add Naming Opportunities

You can associate a prospect with a specific naming opportunity by adding the naming opportunity to the prospect's opportunity record.

A screenshot of a software dialog box titled "Add a naming opportunity" with a close button (X) in the top right corner. The dialog box has a light gray background. Inside, there is a label "Naming opportunity:" followed by a yellow text input field and a magnifying glass icon to its right. At the bottom left, there is a blue circular icon with a question mark and the word "Help". At the bottom right, there are two buttons: "Save" and "Cancel".

To Add a Naming Opportunity to a Prospect Opportunity Record:

1. Open the prospect opportunity record on which to add the naming opportunity.
 2. Click the Naming Opportunities tab.
 3. Click **Add**. The Add naming opportunity window displays.
 4. In the **Naming opportunity** field, search for and select the naming opportunity.
 5. Click **Save**.
-

Plan Steps

You can customize the prospect's plan by adding, editing, or deleting steps. Steps are measures taken in a prospect plan. Often times steps are interactions the fundraiser has with the prospect.

Pending Steps are the most immediate steps expected to be completed. Pending steps will also appear on the constituent's Interactions page. The stage selected for the earliest pending step will be used to determine the plan stage.

Prospect Management for Fundraisers

Planned Steps are steps that have not yet been completed and are planned for some future date. Generally, it is not advantageous to select this status. Planned steps do not display on the constituent's Interactions page, nor do they display on the step owner's Fundraiser page.

Add Steps

You can add steps to a prospect's plan from several locations:

- From the Pending steps tab of a fundraiser record
- From the Details tab of a prospect's plan

Add a step for Floyd, Reese & Kara - Prospect Group

Detail

Objective:

Owner:

Stage:

Status:

Expected date:

Expected start time:

Expected end time:

Time zone:

Actual date:

Actual start time:

Actual end time:

Comment

Additional solicitors

Solicitor

Interaction

Contact method:

Category:

Subcategory:

Participants:

Participant

Help

- A. Enter the purpose or summary for the step.
- B. Select a fundraiser to assign to this step. If the fundraiser is not listed in the menu, click the binoculars to search for the fundraiser to assign to this step.
- C. Select the stage of the step.
- D. Select the status of the step, such as **Planned**, **Pending**, or **Completed**.
- E. Enter the date and times you expect the step to take place.

Prospect Management for Fundraisers

- F. Enter the time zone where the step will take place.
- G. If the step took place, enter the date the step occurred.
- H. Enter comments to further describe this step.
- I. List all additional solicitors to assign to this plan step.
- J. Select how you intend to contact the prospect for this step.
- K. Enter the **Category** related to the contact method.
- L. Enter the **Subcategory** related to the contact method.
- M. List all prospects that will participate in this step. This is especially helpful if you are working with a constituent group prospect.

To Add a Step to a Prospect's Plan:

1. Open the prospect plan on which to add a step.
 2. On the plan's **Details** tab, click the **Add step** button on the Planned and Pending Steps action bar. The Add a step window displays.
 3. Enter the information for the step.
 4. Click **Save** to save the step and return to the **Details** tab.
-

Plan Stage	Description
Qualification	Initial contact and qualification of suspect.
Early Cultivation	Early cultivation has begun for the first major gift (or next gift after stewardship); specific areas of future interest are likely vague or undetermined.
Late-Stage Cultivation	Cultivation and engagement become more purposeful; the prospect's interests gain definition as key relationships are developed; estimated ask date and amount can be added to the opportunity.
Pre-Solicitation	Solicitation details are coming together; "pre-gift" discussions may be taking place; ask amount, date, and designations are fairly well established and recorded in the opportunity.
Solicitation	Formal solicitation has been made and a response is pending; negotiations may occur after the initial ask.

Prospect Management for Fundraisers

Plan Stage	Description
Closure	A formal response, positive or negative, has been received and any unresolved details are being addressed.
Stewardship	The proposal has been accepted, and stewardship steps are in place.

Edit Steps

From either the Planned and pending steps or Completed steps section on the **Details** tab of the Plan page, you can edit existing prospect steps. In addition, from the Planned and pending steps section, you can choose to edit all steps included in the section.

Planned and pending steps (7)

Status	Date	Start time	End time	Time zone	Ow...	Objective	Stage	Contact method
Pending	5/17/2012				Dr....	Strategize with...	Early Cultivation	Internal Meeting
<div> <div>+</div> <div>Contact report</div> <div>✉ Write a letter</div> <div>⚙ Step</div> </div>								
Planned	7/31/2				Dr....	Discussion surr...	Early Cultivation	Internal Meeting
Planned	1/31/3				Dr....	Leadership (L.K...	Early Cultivation	Internal Meeting
Planned	4/4/20				Dr....	Tour and enga...	Late-Stage Cult...	Personally Sch...
Planned	6/28/2				Dr....	Proposal Prepa...	Late-Stage Cult...	Task
Planned	8/28/2013				Dr....	Formal Solicita...	Pre-Solicitation	Personally Sch...
Planned	10/31/2013				Dr....	Ask follow-up	Closure	Personally Sch...

Completed steps (1)

Status	Date	Start time	End time	Ow...	Objective	Stage	Contact method	Has document...

Edit steps for Floyd, Reese & Kara - Prospect Group - BOT Campaign Solicitation #2

Plan type: Solicitation Site: Outlines:

Steps

Select all Clear all Update status to:

Expected date	Start time	End time	Time zone	Objective	O...	Stage	Status	Actual date	Contact method	Category	Subcategory
5/17/2012				Strategize...	Dr....	Early Cu...	Pending		Internal Meeting		
7/31/2012				Discussion...	Dr....	Early Cu...	Planned		Internal Meeting		
1/31/2013				Leadership...	Dr....	Early Cu...	Planned		Internal Meeting		
4/4/2013				Tour and e...	Dr....	Late-Sta...	Planned		Personally Sche...		
6/28/2013				Proposal Pr...	Dr....	Late-Sta...	Planned		Task		
8/28/2013				Formal Soli...	Dr....	Pre-Soli...	Planned		Personally Sche...		
10/31/2013				Ask follow-...	Dr....	Closure	Planned		Personally Sche...		

Adjust expected dates: Forward 1 Day(s)

To Edit Steps on a Prospect's Plan:

1. Open the prospect plan on which to edit a step.
2. Select the **Details** tab.
3. In the **Planned and pending steps** frame, click **Edit steps** to edit all steps in the section
OR
click the row of a step and click **Edit** to edit only the highlighted step.
4. Make any necessary changes to the information on the Edit window.
5. Click **Save**.

File a Contact Report

A **contact report** is a interaction within a prospect plan. Completed steps may also be considered contact reports.

When you complete an interaction with a prospect, such as a qualification visit, initial contact, or formal solicitation, you can file a contact report to keep track of your interactions. You can also file contact reports for unplanned activity with a prospect.

With a contact report, you can update the step's details and enter any reactions or expected outcomes from the step. Using this information, you can determine if the next scheduled step is adequate or if you should customize the interaction to meet the prospect's needs or interests.

Once you file a contact report, the information displays on the constituent's Interactions page.

Prospect Management for Fundraisers

The screenshot shows a web form titled "File a contact report". The form is divided into several sections. At the top, there's a header bar with the title and a close button. Below this, the form contains the following fields and sections:

- Objective:** A text input field (labeled A).
- Status:** A dropdown menu showing "Completed (Status will be changed to completed when this contact report is filed)".
- Owner:** A text input field with a search icon (labeled B).
- Stage:** A dropdown menu showing "Pre-Solicitation" (labeled D).
- Actual date:** A date input field showing "9/1/2012" (labeled C).
- Contact Method:** A dropdown menu showing "Personally Scheduled Visit" (labeled E).
- Actual start time:** A text input field (labeled C).
- Category:** A dropdown menu showing "General Interaction" (labeled F).
- Actual end time:** A text input field (labeled C).
- Subcategory:** A dropdown menu showing "Prospect Strategy Meeting" (labeled G).
- Additional solicitors:** A table with one row and one column, labeled H.
- Participants:** A table with one row and one column, labeled I.
- Comment:** A large text area labeled J.
- Next step in prospect plan:** A section header.
- Edit next step information:** A checkbox that is checked.
- Objective:** A text input field showing "honor with 2013 Alumni Award" (labeled K).
- Status:** A dropdown menu showing "Pending" (labeled K).
- Owner:** A text input field with a search icon (labeled K).
- Expected date:** A date input field showing "2/1/2013" (labeled K).
- Actual date:** A date input field (labeled K).

At the bottom of the form, there are buttons for "Save" and "Cancel", and a "Help" link.

- A. If different from the original objective, enter the purpose for the step.
- B. If different from the original owner, enter the step owner.
- C. Enter the date and times the fundraiser completed this step (times are optional).
- D. Select the stage when the step occurred.
- E. Select the method used to contact the prospect.
- F. Select a category to further define the contact method.
- G. Select a subcategory to further define the contact method.
- H. Enter each solicitor who participated in the interaction.
- I. Enter each participant included in the interaction. If filing from a prospect group record, all individual and organization participants must be listed.

Prospect Management for Fundraisers

- J. Enter any additional details about the interaction.
- K. Select the checkbox to update the next step information. You can update the step's objective, change the owner of the step, indicate whether the step is planned, pending, or completed, and enter the expected completion date. By default, this section displays the next pending step in the plan. However, if the plan does not include steps with a pending status, information for the next planned step displays.

To File a Contact Report from the Fundraiser's Record or via the Prospect Plan:

1. Open the fundraiser record assigned to the plan for the prospect and select the **Pending Steps** tab.

OR

Open the prospect plan and select the **Details** tab.

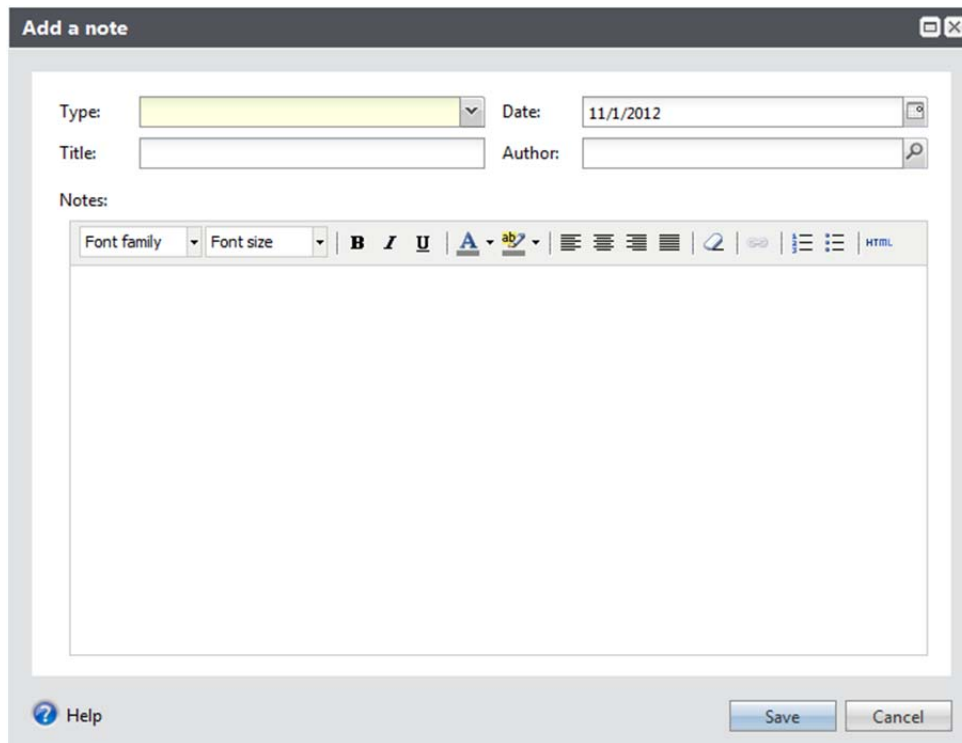
2. For an unplanned activity (i.e., the activity was not previously entered as a pending or planned step), click **Contact report** and then click **File an unplanned contact report**.
 - Select the prospect and the plan for the unplanned contact report.
 - Proceed to step 6.
 3. For a pending plan step, click the row of the step for which you want to add a contact report. (Planned steps must be edited to Pending and saved before the next step.)
 4. On the action bar, click **Contact report** and then click **File a Contact Report**. The File a contact report window displays.
 5. Complete the fields and options available.
 6. Click **Save**.
-

Add Documentation

The Documentation tab on a prospect's plan allows you add notes to the plan.

Notes

The Notes tab gives you the ability to create separate categories or types of notes and assign security to the information they contain based on the notepad type.



To Add a Note to a Prospect Plan:

1. Open the prospect plan on which to add a note.
 2. Select the **Documentation** tab.
 3. On the action bar, click **Add, Note**.
 4. On the Add a note window:
 - Select the note type.
 - Enter a title and date.
 - Enter your name as the author.
 - Enter the note information in the **Notes** field.
 5. Click **Save**.
-



Review

1. A prospect must have a constituent record before he or she can have a prospect view in your TAS database. True/False?
2. Describe how to add a plan to a prospect record.
3. Where on a prospect record can you specify the organizations, affiliations, activities, or pursuits in which a prospect expresses interest?
4. What action do you take to track interactions you have with a prospect, such as a qualification visit, initial contact, or formal solicitation?
5. How do you access an opportunity record?
6. On a fundraiser record, the _____ tab tracks information about your upcoming prospect steps in both a statistical and graphic format.
7. What feature can you use to change the fundraiser assigned to a group of prospects previously assigned to another fundraiser?
8. Where can you access the mapping tool that lets you locate prospects and constituents on an interactive map?
9. How do you navigate to a constituent's Wealth and Ratings page?



Summary

- The Prospect Management process outlines the overall moves management process, the stages managed by fundraisers and donor prospect coordinators. The stages include research and confirm the suspect, add the prospect to the database, then qualify, cultivate, and solicit the prospect.
- A prospect must have a constituent record before he or she can have a prospect view in your TAS database. Be sure to search the database for the existing prospect before you add them as new to the database. Once you add a prospect, a Prospect and Planned Giving Info constituency is added to the Constituencies tab of the constituent record.
- When you complete an interaction with a prospect, such as a qualification visit, initial contact, or formal solicitation, you can file a contact report to keep track of your interactions. You can also file contact reports for unplanned activity with a prospect.
- Requests for prospect assignment may be entered into TAS. Prospect coordinators review the list of submitted assignment requests. The request can be accepted or denied and an explanation is added.
- A prospect plan tracks the prospect's plan activity including step detail, ask opportunities, fundraisers associated with the prospect plan, and any planned gifts.
- Once you add a default plan outline to a prospect record, you can customize the prospect's plan by adding steps, editing existing steps, or deleting steps.
- On the Opportunities tab of a plan record, you can add information about opportunities to help you better track prospect steps and gift requests.
- You can associate a prospect with a specific naming opportunity by adding the naming opportunity to the prospect's opportunity record.
- Fundraisers are the people who are involved with a prospect's management including planning, cultivation, and solicitation stages.
- The Assign prospects in bulk function allows you to assign or reassign a large number of prospects to fundraisers in your database.
- Use the integrated mapping functionality in the program to geographically locate prospects and constituents on an interactive map. This mapping tool is powered by Microsoft's Virtual Earth.
- The Wealth and Ratings page for each constituent displays the wealth data you have gathered for that constituent.

APPENDIX

TAS Prospect Management Definitions

Prospect Status	Description
Suspect	The constituent is believed to be capable of a major gift now of \$50,000 or more (or less as identified by individual units) and has an identified area of interest with OSU.
Future Suspect	The constituent is not currently capable of a major gift but strong indicators for future giving and/or a need to build greater affinity with OSU exist.
Undetermined Suspect	The constituent has been reviewed by Research but is unable to be classified as a major gift suspect at this time. Revaluation will occur in a future screening.
Low Affinity Suspect	Regardless of capacity, the constituent has little known affinity to OSU.
Disqualified	After qualification visit to a pre-qualified (by Research) Suspect, a DO determines the Suspect is not a Prospect.
Prospect	A DO has qualified the constituent as a major gift prospect.
Prospect Group Member	The constituent is a member of a prospect group. Users should navigate to the group record to determine status, PM, and other prospect information.
Former Prospect	The constituent has been removed from active prospect management.
Former Prospect Group Member	The constituent was a member of a prospect group that has been removed from active prospect management. Users should navigate to the group record to view prospect history.

Prospect Management for Fundraisers

Prospect Assignments	Description
Prospect Manager	The prospect manager is assigned on the constituent's prospect record and is responsible for overseeing the entire prospect relationship including plans, opportunities, stewardship plans etc.
Prospect Assistant Manager	Works in partnership with the prospect manager to create and implement overall strategies and to facilitate communications among team members.
Prospect Research Manager	Research staff member assigned to this prospect for general tracking purposes. Research manager assignments will made by the director of Development Research.
Prospect Stewardship Manager	Stewardship staff member assigned to coordinate and implement overall stewardship activities for the prospect.
Industry Liaison Manager	Staff member from the Industry Liaison Office assigned to coordinate strong strategic relationships between industry and the university.

Plan Type	Description
Solicitation	Standard gift cycle moving prospect from cultivation through solicitation and closure.
Stewardship	Captures work related to general stewardship of the prospect, especially when no plans exist to solicit in the near future.
Probate Management	Used exclusively by the Office of Gift Planning; captures work related to booking planned gifts and dealing with estates in probate.
Volunteer Engagement	Used exclusively by the Campaign Office to track volunteer activities of high-level donors and prospects.
Qualification	Captures work completed to qualify a constituent as a prospect; created automatically at the time of initial assignment.
ILO: Sponsored Research Project ILO: Relationship Development ILO: Community Relations ILO: Student Engagement	Used exclusively by the Industry Liaison Office; captures work related to developing strategic partnerships between industry and the university.

Prospect Management for Fundraisers

Plan Assignments	Description
Primary Manager	Primary manager of the plan.
Secondary Manager	Development officer providing significant assistance with the plan, and/or other OSU personnel (such as deans, directors, faculty, and staff).
Secondary Solicitor / Internal Partner	Development officer(s) providing significant assistance with the plan, and/or other OSU personnel (such as deans, directors, faculty, and staff).
Secondary Solicitor / Volunteer	Board or committee members and/or other volunteers.
Participant Role	
Key Influencer	Any constituent that has a great amount of influence on the prospect or prospect group but is not a professional advisor or volunteer.
Professional Advisor	Constituent, such as attorney or estate planner, advising the prospect.

Prospect Management for Fundraisers

Plan Stage	Description
Qualification	Initial contact and qualification of suspect.
Early Cultivation	Early cultivation has begun for the first major gift (or next gift after stewardship); specific areas of future interest are likely vague or undetermined.
Late-Stage Cultivation	Cultivation and engagement become more purposeful; the prospect's interests gain definition as key relationships are developed; estimated ask date and amount can be added to the opportunity.
Pre-Solicitation	Solicitation details are coming together; "pre-gift" discussions may be taking place; ask amount, date, and designations are fairly well established and recorded in the opportunity.
Solicitation	Formal solicitation has been made and a response is pending; negotiations may occur after the initial ask.
Closure	A formal response, positive or negative, has been received and any unresolved details are being addressed.
Stewardship	The proposal has been accepted, and stewardship steps are in place.

Opportunity Status	Description
Unqualified	Rough estimates of ask date and amount exist; specific designations are likely unknown.
Qualified	Ask date, amount, and designations are being finalized.
Response Pending	An ask has been made for support of this opportunity.
Accepted	The prospect has responded and indicated that they will make the gift to this opportunity.
Rejected	The prospect has responded and indicated that they will not make a gift in response to this opportunity.
Cancelled	After cultivating the prospect and perhaps even preparing a proposal, you determine that the ask will not be made.

Interactions Guidelines

What is an interaction?

An **individualized and meaningful** activity with any constituent in which new information is obtained and/or that moves Ohio State's relationship forward (as it relates to giving, engagement, etc.) constitutes an interaction that should be filed in TAS.

Individualized means the activity was specific to the constituent, and not an event, form letter, or broad appeal.

Meaningful means the activity resulted in new knowledge about the constituent and/or relates to a strategy, gift conversation, gift negotiation or gift stewardship. When a colleague (or your future self) reads this they will get value from it.

How quickly should an interaction be filed?

All interactions should be entered in TAS within one week of the activity.

On which records should I enter the contact report?

For individuals, enter the contact report on constituent's individual record. Additional individuals contacted should be listed in the same interaction under "Participants." In no case should there be multiple interactions filed for the same activity.

For contacts with individuals representing organizations, enter the interaction on the organization record and include the individuals contacted as participants. For example, if you met with Jane Doe to discuss Company X, file the interaction on Company X's record and include Jane Doe as a participant.

Prospect plan steps are really just interactions tied to a specific plan. Some plans will occur on prospect group records, and steps/interactions filed on group records should have the group members listed individually as participants.

What should NOT be filed in TAS as interactions?

- Events
- Thank-you letters or form letters
- Board, committee, and volunteer meetings
- Group solicitations and appeals (to more than one individual, at any dollar level)
- Cards and notes for holidays and special occasions
- Random friendly encounters where nothing new is learned nor is the relationship advanced
- Meetings with administrators, faculty, physicians, etc. that do not directly cover their personal philanthropy

What if there are multiple contactors?

Many interactions will have multiple individuals representing OSU, such as DOs, deans, directors, volunteers, and other staff. In these situations, one single interaction should be filed with all additional personnel listed as additional contactors/solicitors.

All contactors are responsible for coordinating single entry of the interaction in TAS. (The primary/owner may add the interaction to TAS and others can review and make additions, if desired.)

Prospect Management for Fundraisers

Guidelines: Interaction Summary/Objective

Useful summaries explain purpose and/or outcome, who was visited by whom and where, and what was discussed. Date and contact methods are not necessary, as they are collected in another field. If an ask was made or a gift was presented, be sure that is clear in the title.

Examples of **complete summaries** include:

- Met with Logan and asked for \$1M gift for cancer research support
- Dinner with Joe Steinmetz and OSU alumni to discuss fundraising for Ottoman and Turkish Studies
- Discussion and planning for event in Palm Beach hosted by Peter and Mary Jane
- Cultivation visit to determine interest in supporting Engineering programs
- Dr. Smith was asked and agreed to an \$80K gift to support Ross HH Medical Director Fund
- Hosted Lois at KSA and CEG for facility tours
- Tony joined Drs. Abraham and Mazzaferri to hear an update on his gift to Cardiology
- Scott emailed with questions about draft of ME gift agreement

Examples of **incomplete** summaries include:

- Met for dinner
- PSV with Mark
- PSV lunch at Rusty Bucket
- Chicago trip
- Greeted during visit to basketball suite

Guidelines: Interaction Comments

The text should be concise and reflect the actual account of the contact. Interactions should include not only a statement of purpose, but also a summary of what was learned.

Tips for creating useful contact report text:

- Lead with a concise summary statement such as “The purpose of the contact was....”
- Include a conclusion such as “The result of the contact was...” or “I learned...”
- Describe who was meeting with whom (including full names and titles), where the meeting took place and the purpose of the meeting.
- Describe the topics of discussion and what various participants contributed to the discussion.
- Note and account for donor likes, dislikes and statements regarding their affinity to Ohio State, political statements, passion statements along with information on key relationships and biographical updates.
- If an ask was made or answered, be sure to include the amount, designation(s), initial or formal response, anticipated response date, and timeline for follow-up.
- Describe qualifying information:
 - Family (members, size, structure, relatives, situations)
 - Assets (hard, soft, liquid, investments, properties)
 - Values (social, personal, other issue areas)
 - Advisors (personal or professional)
 - Motivations (projects, involvement, beat areas, experiences, passions)
 - Career Information (where, what and for how long)

End the interaction with your overall summary of the contact and next steps.

Prospect Management for Fundraisers

Contact Method	Description
Attempt to Contact	One or more unsuccessful attempts to contact a prospect; may be a summary of attempts over multiple dates..
Electronic	Personal one-on-one electronic correspondence, such as email or text messages, where targeted and/or substantive information is exchanged beyond casual conversation.
Face to Face	A one-on-one interaction with the constituent; face to face interactions are unplanned and/or occur at events, meetings, etc.; substantive information is exchanged beyond casual conversation.
Internal Meeting	An internal meeting is held to discuss business and/or strategy related to a constituent and the constituent is not present.
Letter	Personal one-on-one correspondence used to distribute targeted information to the constituent.
Personally Scheduled Meeting	A personal meeting is deliberately scheduled and strategically planned with desired outcomes; it is intentionally initiated to deepen the university constituent relationship by evaluating interests or capacity, strengthening personal connectivity, or advancing the constituent toward a gift.
Task	Tasks track administrative steps related to the constituent that may not involve direct interaction with the constituent.
Telephone	An in-depth phone conversation where information worth recording and useful to moving the relationship forward is exchanged.

Guidelines: Specific Situations

Events

**Athletic Events/Concerts/Shows Suite and Box Attendance
Board/Campaign Committee/Volunteer Meetings**

Any activity with 10 or more constituents should be documented as an event, not an interaction.

You may have a meaningful one-on-one conversation and/or stage movement with an attendee at an event. In this case, you should file an additional interaction for only that attendee on his/her record; the type of this interaction is (by definition) a Face-to-Face interaction. Interactions at events of any type are not Personally Scheduled Visits.

Ethics and Privacy

Prospect and donor information may be considered public information and an individual could request to see the information contained on a constituent record. Therefore, discretion and common sense must be used when entering interactions and other information in TAS.

Prospect Management for Fundraisers

It is important to be factual, professional, and balanced in the approach and description of the activity. Interactions should only include information that will help advancement staff and representatives develop meaningful relationships with constituents.

Conjecture, personal opinion, and revealing intimate or private information are not to be a part of the constituent record. Interactions should not include health-protected information or potentially embarrassing details. Interactions should be crafted with discretion and sensitivity, always keeping the best interests of the constituent in mind. Consider how you'd feel if the constituent asked to see his/her own TAS record; are you comfortable with what they would read?

Health Information

Interactions should only include health information (1) when it has been relayed directly to the fundraiser by the constituents themselves and (2) when it is relevant to their interests and relationship to Ohio State. Even considering this general guidance, the fundraiser or staff member should use their own judgment and discretion as to what details, if any, should be documented. See the "Ethics and Donor Privacy" section elsewhere in this document.

HIPPA policies must be adhered to in all instances. If you have questions about HIPPA compliance or policy, please contact the Director of the Grateful Patient Program.

Categories

Category	Description
General Interactions	Record general contact with constituents not directly related to front-line fundraising or stewardship activities.
Fundraising	Record contact with constituents directly related to the gift cycle (qualification, cultivation, solicitation, and/or prospect plans).
Industry Liaison Office (ILO)	Exclusively used by the Industry Liaison Office to denote ILO activities.
Prospect Research	Exclusively used by the Prospect Research office to indicate activities carried out by research staff.
Stewardship	Record specific stewardship activities for constituents.

All interactions and contact reports require the selection of a category and subcategory. The subcategories available depend on the category selected.

Interactions for Prospects

In the **Fundraising** category of interactions and contact reports, the subcategory of **Prospect** should be used for all fundraising activities on prospect records (with the exception of the subcategory **Prospect Strategy Meeting**).

Contact reports filed on a **Prospect Group** record require the selection of all relevant individual or organization records in the "Participants" field.

GIFT PLANNING

When donors make contributions using a planned gift vehicle, you can track the details in ***The Advancement System (TAS)***. You can record both the initial gift value and the gift's remainder value, store basic payout information for applicable gift vehicles, and keep track of beneficiaries and relationships for a planned gift. In addition, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets.

Lesson Objectives

After you complete this lesson, you will be able to:

- Navigate to view planned gifts associated with a constituent
- Navigate the tabs of a planned gift record

Planned Gifts

Gift Planning is usually defined as a set of ways a donor can leave money or assets to a nonprofit at his/her death; or a way to invest money so that the donor receives benefits during his/her life and then bequeaths the remaining funds to the nonprofit.

In most cases, a planned gift will benefit OSU in the future. Unlike an outright gift that provides OSU full benefit upon receipt, a planned gift defers OSU's use of transferred assets until the death of a donor, or until the end of a specified period of time.

With **TAS**, a planned gift can be created using a variety of vehicles. Planned gift records contain tabs and fields specific to planned gifts, including the gift vehicle. The gift vehicle defines how the gift conditions are structured. In **TAS**, the planned gift vehicle options are represented in this graphic:

Vehicle
Charitable gift annuity
Charitable remainder unitrust
Charitable remainder annuity trust
Charitable lead unitrust
Charitable lead annuity trust
Pooled income fund
Life insurance
Retained life estate
Bargain sale
Outright gift
Bequest
Retirement plan assets
Testamentary charitable trust
Living trust
Other

View Planned Gifts

You can view and access planned gifts in several ways:


- Via the Planned Gifts tab on a prospect's record.
- Via the Planned Gifts tab on a prospect's plan.
- Via the Planned Gifts tab on the Revenue tab of a constituent's record. Planned gifts on this tab display for the prospect, as well as any constituents listed as planned giving relationships.
- Via the Planned giver constituency code.

Notifications: "", "Gift TLC", "Prospect Manager: Kathryn Mellett", and "TLC Donor - VIP Constituency Member". Click here for more information.

Individual Lookup ID: 00053399

Constituencies: OSUAA Alumni, Alumnus, Committee member, Event registrant, Loyal donor, Major donor, Member, **Planned giver**, **Prospect**, Recognized donor

Personal Information

 **Mr. Brutus A. Buckeye Sr.**
 Nickname: Maidenc

Education

Institution: The Ohio State University
 Degree: BS-Bachelor of Science
 Class of: 1958
 Status: Graduated
 Primary: ☒

Primary Relationships

Spouse: Ms. Becky Buckeye
 Household: Ms. and Mr. Becky Buckeye
 Primary business:

Contact Information

Primary phone: 614 688-3335 (Home)
 Primary email: brutus_buckeye1@aol.com (Preferred)

Addresses: (1 of 4)

C/O Burlington Capital LLC
 1700 Farnam St Ste 2850
 Omaha, NE 68102-2076
 Seasonal (Seasonal)

Memberships: (1 of 5)

OSU Alumni Association
☒ Ms. Becky Buckeye
 ID: 8-10329352 Status: Active
 Expiration: 12/31/2050
 Level: Life Joint
 Member since: 7/3/2003

Show less

Summary Contact Personal Info Relationships **Revenue** Memberships **Prospect** Education Documentation and Interactions Communications History On

Plans Ask Summary Step Summary Prospect Summary Prospect Team **Planned Gifts** Funding Interests Campaigns Prospect Manager History

To Open a Planned Gift Record:

1. From the prospect tab, select the Planned Gifts tab.
2. Select the entry you want to view.
3. In the Vehicle column, click the name of the entry you want to view.
4. The planned gift opens.

The Planned Gifts Tab

Summary	Contact	Personal Info	Relationships	Revenue	Memberships	Prospect	Education	Documentation and Interactions	Communications	History	On
Plans	Ask Summary	Step Summary	Prospect Summary	Prospect Team	Planned Gifts	Funding Interests	Campaigns	Prospect Manager History			
Planned gifts (3) Filters More											
Constituent	Date	Status	Vehicle	Amount	Balance	Payments	Sites	Campaigns			
Mr. Brutus A. Buckeye		Accepted	Retirement plan assets	\$110,000.00	\$110,000.00			Athletics - U4			
Original gift	11/5/2010	Accepted	Retirement plan assets	\$40,000.00	\$40,000.00			Athletics - U4			
Addition	3/31/2015	Accepted	Retirement plan assets	\$70,000.00	\$70,000.00			Athletics - U4			

Planned Giving Summary

If you have additions to planned gifts, the gifts and amounts are all displayed on the Planned Gifts tab. The first row is the total of the original planned gift and any additions. You can expand that summary row to see the original gift and the additions individually.

The Planned Gift Record

To view the detail level of the planned gift, click on the planned gift in the Vehicle column. The planned gift record displays details about the selected planned gift. The information displays on several tabs.

11/5/2010 Retirement plan assets: \$110,000.00

Notifications: "PG Revocable". Click here for more information.

Planned gift vehicle: Retirement plan assets Status: Accepted Expected maturity year:
Revocable: Yes Anonymous gift: No

Values **Other details**

Total gift amount: \$110,000.00 Gift is contingent: No
Original gift amount: \$40,000.00 Date: 11/5/2010 Gift value is nominal: No
Recognition amount: \$40,000.00
Net present value: \$79,611.40 As of: 11/5/2010
Realized amount: \$0.00
Remainderman %: 0.000
Remainder value: \$0.00 As of:
Probate status: Pending As of:

Planned Gift Details | Planned Giving Relationships | Assets | Beneficiaries | Revenue | Sites | Letters | Documentation | Campaigns | Additions | OnBase Documentation

Planned gift details (1) [R] More ▾

Designation	Amount	Category	Use code	Type	Date added
Athletics	\$40,000.00	Unrestricted	Foundation		11/5/2010

Funding types (0) [R] More ▾

Funding type	Prospect's interest level
--------------	---------------------------

Planned Gift Details Tab

The Planned Gift Details tab contains information about how the prospect wants your organization to use the gift. You can view information about the designations to which to apply the planned gift and view the funding interests of the prospect to help determine to which designations to apply the planned gift revenue.

Planned Gift Details | Planned Giving Relationships | Assets | Beneficiaries | Revenue | Sites | Letters | Documentation | Campaigns | Additions | OnBase Documentation

Planned gift details (1) [R] More ▾

Designation	Amount	Category	Use code	Type	Date added
Athletics	\$40,000.00	Unrestricted	Foundation		11/5/2010

Funding types (0) [R] More ▾

Funding type	Prospect's interest level
--------------	---------------------------

Planned Giving Relationships Tab

The Planned Giving Relationships tab tracks any prospect relationships relevant to the planned gift, such as an attorney or family member. From this tab, you can access the relationship's constituent record.

To Open a Relationship's Constituent Record from the Planned Gift:

1. From the open planned gift record, select the **Planned Giving Relationships** tab.

- Click the name of the relationship entry that you want to open. The relationship's constituent record opens.

Beneficiaries Tab

On the Beneficiaries tab you manage the beneficiaries associated with the planned gift.

Revenue Tab

On the Revenue tab, depending on the type of planned gift, you may be able to view the planned gift revenue transactions and any payment transactions applied to the planned gift. (ex. A distribution from a bequest may show payments on this tab)

Planned Gift Details	Planned Giving Relationships	Assets	Beneficiaries	Revenue	Sites	Letters	Documentation	Campaigns	Additions	OnBase Documentation
Revenue (1) Filters More										
Date	Amount	Transaction type	Constituent	Total payments	Designation					
11/5/2010	\$40,000.00	Planned gift	Mr. Brutus A Buckeve	\$0.00						

To Access a Planned Gift's Revenue Record:

- Click **Revenue** tab.
- Click **Back** to return to the Planned Gift record.

Campaigns Tab

When designations are associated with the planned gift and specific campaigns are associated with the designations, these campaigns display on the Campaigns tab. From this tab you can go to the campaign record.

Planned Gift Details	Planned Giving Relationships	Assets	Beneficiaries	Revenue	Sites	Letters	Documentation	Campaigns	Additions	OnBase Documentation
Campaigns 2										
Athletics (11/5/2010) - \$40,000.00										
Campaign	Campaign subpriority									
Athletics - U4	Drive High Impact Innovation - Drive High Impact Innovation									

Additions Tab

The Additions tab displays on the planned gift record for planned gifts of type:

- Charitable remainder unitrust
- Charitable lead unitrust

Gift Planning

- Pooled income fund
- Life insurance
- Bequest
- Retirement plan assets
- Testamentary charitable trust
- Living trust
- Other

Planned Gift Details	Planned Giving Relationships	Assets	Beneficiaries	Revenue	Sites	Letters	Documentation	Campaigns	Additions	OnBase Documentation
Additions (1)  More ▾										
Date	Amount	Recognition amount	Designations							
3/31/2015	\$70,000.00	\$70,000.00	Athletics - D54140							

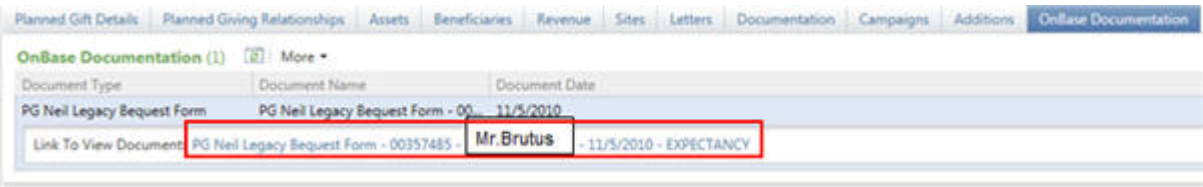
You can use the tab to track additions or modifications to the original planned gift.

For example, a donor may set up a bequest for a certain amount and later modify it to include more than the initial amount. In this case, you would have the original planned gift for the initial amount. You would also go to the Additions tab of the bequest and add the additional amount.

Additions to planned gifts can have their own designations and assets.

OnBase Documentation Tab

The OnBase Documentation tab allows you to view Planned Gift documentation.



To Access documentation for a Planned Gift:

- 1. Click OnBase documentation tab.
- 2. Click on name of document
- 3. Click on link to view the document.
- 4. Document viewer opens in a separate window. Planned gift document is displayed.
- 5. Close document viewer by clicking on x.



The Planned Gift View tab displays a summary of the information tracked on the other tabs.

Gift Planning

Planned Gift Details
Planned Giving Relationships
Assets
Attributes
Revenue
Sites
Documentation
Campaigns
Additions
Planned Gift View

Planned Gift Notes (6)
+ Note

Date	Type	Title	Note	Author	Notification
12/10/2010	Distribution		First partial distribution	Ms. Jennifer Ann Joerger	
12/10/2010	Receipt to		Michael E. O'Malley, Es...	Ms. Jennifer Ann Joerger	
12/10/2010	Acknowledgment to		Marjorie Z. Robinson (s...	Ms. Jennifer Ann Joerger	
6/4/2010	Valuation		Inventory values estate...	Ms. Jennifer Ann Joerger	
6/4/2010	Designation		Will reads: "to the Virgi...	Ms. Jennifer Ann Joerger	
6/4/2010	PG Comment		Per 5/12/10 conversati...	Ms. Jennifer Ann Joerger	

Planned Gift Details (2)
Edit

Designation	Amount	Category	Use code	Type	Date added	Home Departm...	Campaign
The Virginia I. Zi...	\$50,000.00				6/4/2010	EHE Administrat...	
The Virginia I. Zi...	\$50,000.00				6/4/2010	Lima Campus	

Additions (2)
Add

Designation	Amount	Recognitio.	Category	Use code	Type	Date	Home Departm...	Campaign
Virginia Zirkle...	\$9,433.27	\$9,433.27				1/19/2012	EHE Administ...	
Zirkle Scholar...	\$9,433.27	\$9,433.27				1/19/2012	Lima Campus	

Distributions (4)

Date	Amount	Transaction type	Constituent	Total payments	Designation
12/10/2010	\$45,000.00	Payment	Ms. Virginia Irene Zirkle		The Virginia I. Zirkle Sch...
12/10/2010	\$45,000.00	Payment	Ms. Virginia Irene Zirkle		The Virginia I. Zirkle Sch...
1/20/2012	\$5,000.00	Payment	Ms. Virginia Irene Zirkle		The Virginia I. Zirkle Sch...
1/20/2012	\$5,000.00	Payment	Ms. Virginia Irene Zirkle		The Virginia I. Zirkle Sch...



Summary

- You can view and access planned gifts in several ways:
 - Via the Planned Gifts tab on a prospect's record.
 - Via the Planned Gifts tab on a prospect's plan.
 - Via the Planned Gifts tab on the Revenue tab. Planned gifts on this tab display for the prospect, as well as any constituents listed as planned giving relationships.
 - Via the Planned giver constituency code.
- On the planned gift, you can track the designations to which it is associated, funding types, and relationships relevant to the planned gift, such as an attorney or family member. You can also track assets and beneficiaries related to the planned gift.
- Planned gift attributes can be used to track specialized information about the planned gift when no field or tab exists for that information.
- The Additions tab lets you track additions or modifications to the original planned gift. For example, a donor may set up a bequest for a certain amount and later modify it to include more than the initial amount. Additions to planned gifts can have their own designations and assets.

Glossary of Gift Planning Terms

Bequest – donor names OSU the beneficiary of his/her will or trust

IRA rollover – Donor directs that his/her annual required minimum distribution from his/her individual retirement account is donated to OSU

IRA beneficiary designation – donor names OSU the beneficiary of his/her individual retirement account, to be received by OSU upon the donor's passing

Life Insurance – donor names OSU the beneficiary of his/her life insurance policy or, donor names OSU the owner and beneficiary of his/her life insurance policy.

Charitable Gift Annuity – contract between donor and OSU where the donor transfers assets to OSU, and OSU guarantees a specific annual payment to donor, or other donor-chosen beneficiaries, for the remainder of an annuitant's life (or 2 annuitants' lives). **Annuitant = A person who is entitled to receive benefits from an annuity.

Charitable Remainder Trust – donor irrevocably transfers assets into a trust. A percentage of income is paid to donor or other beneficiaries for specified period of time. After the term ends, the income stops being paid to the charity, and the charity receives the assets in the trust.

Charitable Lead Trust – donor irrevocably transfers assets, such as cash, stocks and artwork, to a trust for a set term of years. Each year, payments are made from the trust to the donor's designated charity/charities. Once the trust's term expires, what is left goes to the donor's heirs.

Pooled Income Fund – A pooled income fund is a trust that is established and maintained by a public charity. The pooled income fund receives contributions from individual donors that are commingled for investment purposes within the fund. Each donor is assigned "units of participation" in the fund that are based on the relationship of their contribution to the overall value of the fund at the time of contribution.

Each year, the fund's entire net investment income is distributed to fund participants according to their units of participation. Income distributions are made to each participant for their lifetime; after which, the portion of the fund assets attributable to the participant is severed from the fund and used by the charity for its charitable purposes. A pooled income fund could, therefore, also be described as a charitable remainder mutual fund.

Life Estate – Donor irrevocably transfers title to a personal residence or farm to a charitable organization but donor retains the right to the use of the property for a term that is specified in the gift agreement. At the conclusion of the measuring term, all rights in the property are transferred to the charitable organization.

Accepted – OSU has been provided with the appropriate documentation to substantiate the planned gift expectancy and it is being counted in giving totals

In probate – donor has passed away and gift is working through the probate process in order to ultimately be delivered to OSU

Matured – OSU has received the entirety of the planned gift and nothing additional is expected

Total Gift Amount – sum of initial planned gift and any subsequent additions