



ADVANCE



Web Access

Glossary of Terms

Training Manual

GLOSSARY OF TERMS

A **ALUMNI:** Former students of a university are considered alumni. All alumni who house a degree or certificate from CWRU are automatically entered into Advance as Alumni. However the University also recognizes students who have 12 or more credit hours from CWRU, regardless if they have obtained a degree or certificate; however they are not automatically entered into Advance.

ANNUAL FUND DONATION: CWRU's definition of an Annual Fund donation is that it must be annual in nature (expected to come in every year), they must support current operations (defined as spendable income), and they must be unrestricted (the donor has placed no restrictions on the use of the donation, other than directing the donation to a particular school or college). The Annual Fund is always reported as Cash and Cash equivalents. Pledges are not included when reporting the Annual Fund because unpaid Annual Fund pledges are washed. Cash (gifts and pledge payments) is the most accurate means of tracking, benchmarking, and reporting on performance.

ANNUAL FUND PLEDGE: Annual Fund Pledges are pledges that are annual in nature, meaning they should ideally occur year after year. At the close of the fiscal year, all unpaid annual fund pledges that do not have a payment schedule date greater than June 30 in the system will be washed automatically.

ANNUAL FUND PROSPECT: A prospect coded Annual Fund indicates that CWRU will attempt to solicit, over the prospect's lifetime, a total lifetime giving sum of \$10K or less to the Annual Fund in donations to CWRU.

ANNUITY: Annuities differ from outright gifts because CWRU does not realize an asset until some point in the future. In an annuity transaction, the donor transfers assets (cash or securities) to CWRU and, CWRU in turn pays the donor or other beneficiaries a guaranteed payment for life.

APPEAL: Appeals track Annual Fund dollars raised as a result of a particular direct mail piece. This tracking is done with an appeal code which is created by Advancement Services and then uploaded by the individual development department using Appeal Loader.

ASSISTANT PROSPECT MANAGER: The Assistant Prospect Manager is second in line to the Prospect Manager. The prospect manager is responsible for coordinating all contacts of a philanthropic nature with the university. Requesting assignment as a prospect manager indicates an intent to solicit a special, major or principal gift from a prospect. There can only be one designated prospect manager, but multiple assistant prospect managers and an annual fund manager. All other claimants must abstain from soliciting a prospect without first consulting the assigned prospect manager.

ATTAINMENT: Also known as Commitment. Attainment is calculated by adding Gifts, Matching Gifts and Pledges. Pledge payments are NOT included in attainment reporting.

AUCTION: A fund raising event at which guests pay the University or for goods and services donated by third parties. Individuals who purchase goods or services are not counted as charitable donors. In most cases however the individual who donated goods for the auction may receive charitable credit for their items.

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B **BANK DRAFTS:** A method of giving. A donor may elect to have Gifts Processing electronically debit their checking or savings account regardless of where they bank. These drafts are established for one time gifts as well as for indefinite periods and may be stopped when Gifts Processing receives a written request from the donor. CWRU calls the bank draft program EZ Giving. The donor completes an EZ Giving form and returns it to Gifts Processing. Once a month, Gifts Processing personnel will debit the donor's specified amount from the donor's account. Bank debits can be done on the first of the month and the 15th of the month.

BENEFIT: The fair market value of a ticket to any event, of any good or service purchased at an auction, or consideration associated as sponsorship. In relation to an event, the term benefit applies, but is not limited, to the fair market value of a meal or other food and beverage service, entertainment, performance, or sporting event. The benefit associated with a purchase at an auction is equal to the fair market value of the good or service bought. In relation to sponsorships, benefit refers to the fair market value of gifts and privileges associated with the level of sponsorship.

BEQUEST: A bequest is a provision in a will, trust, or other testamentary legal document providing a gift to CWRU upon the death of the donor or his/her beneficiary. Will Commitments can be revocable. When the donor's assets are transferred to CWRU after death, they are recorded as Bequest Gifts or Realized Bequests in Advance.

BLACKBAUD RATING: Blackbaud Ratings can be found on the Entity Overview under Prospect Tracking, Evaluations. Blackbaud is a predictive model which charts capacity to give and the likelihood a prospect will give. It is the most detailed product available on the market.

C **CAMPAIGN:** A campaign is an intensive fundraising effort designed to raise a specified sum of money within a defined time period to meet the varied asset-building needs of an organization.

CANNED REPORTS: Canned Reports are prebuilt by Advancement Services' programmers to satisfy frequent user requests. Canned Reports are located at the top of the Advance screen and can be accessed by clicking on the Pie Chart icon.

CAPITAL FUNDS: Capital Funds are resources earmarked for (1) building construction, renovation or remodeling; (2) equipment; or (3) books and other non-disposable items.

CASH: Also known as Private Support. Cash is calculated by adding Gifts, Matching Gifts and Pledge Payments. Pledge payments made in the current fiscal year as well as pledge payments on pledges made in past fiscal years are included.

CHARITABLE GIFT: Charitable gifts are tax-deductible gifts made to a not-for-profit organization. Charitable gifts are a voluntary transfer of items of value from individuals, industry, foundations and other sources to the University for either unrestricted or restricted utilization in the operation of the University, for which the University has made no commitment of resources or services, other than the possible agreement to the designation of the use of the gift by the donor. Gifts usually take the form of cash, checks, securities, real property, or personal property.

CHARITABLE GIFT ANNUITY (CGA): A CGA is a contract between a donor and a charity whereby the donor transfers cash to the charity in exchange for a partial tax deduction and a lifetime stream of annual income from the charity. When the donor passes away, the charity may utilize the gift(s). CGA's are a type of Planned Gift.

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CHARITABLE LEAD TRUST: A charitable lead trust allows for one or more charitable organizations to receive income payments from the trust for a specified number of years or one or more lifetimes. At the end of the term, the assets of the trust return to the donor or designee. A lead trust can reduce gift and estate taxes or provide a charitable deduction for the donor. Charitable lead trusts are most appealing to wealthy donors who want to pass appreciated assets to their heirs without paying a substantial amount in taxes.

CHARITABLE REMAINDER TRUST: Two basic types of charitable remainder trusts qualify for federal tax benefits (see Annuity Trust and Unitrust). In both arrangements, a donor gives stock, cash, or other assets to a trust. Those assets are invested; producing income for the donor--or other beneficiary--either for a fixed period of time or until the donor dies. The donor is allowed to claim a tax deduction for the estimated portion of the assets that will ultimately go to charity. When the donor dies, the charity keeps all remaining assets.

COLLABORATING DEVELOPMENT OFFICER: A Collaborating Development Officer is a fundraiser who has collaborated with another fundraiser to obtain a gift. Proposals in Advance allow the addition of a Collaborating DO so that both the Soliciting DO and the Collaborating DO will receive credit for the gift.

COMMITMENT: Also known as Attainment. Commitment is calculated by adding Gifts, Matching Gifts and Pledges. Pledge payments are NOT included in commitment reporting.

CONDITIONAL PLEDGE: Conditional pledges are those that place requirements on the institution to perform some task or take some sort of action that it might not otherwise initiate. A conditional pledge may also depend on some future event over which neither the institution nor the donor may have control (i.e. a foundation makes a 200k pledge paying 25k per quarter that is contingent upon reasonable expansion of co-op program and student participation therein). Conditional pledges can also be challenge pledges where by the donor will give a certain amount of money if the university raises additional money for a particular purpose.

CONTACT REPORT: A contact report is a written record of conversation, phone call, appointment attempt, visit or substantive phone call with an entity or prospect. Contact Reports are entered into Advance under the Entity Overview screen and should include as much relevant information as possible (who, what, why, where, when, next steps). Three types of Contact Reports count towards a DO's performance review/goals: Visit-Home Office, Visit-Campus and Substantive Phone Call.

CONTRACTS: An agreement between CWRU and another entity to provide an economic benefit for compensation. The agreement is binding and creates a quid pro quo relationship between the institution and the entity. Contracts are excluded in CWRU's fundraising totals.

CONTEXT SENSITIVE REPORTS: Context Sensitive Reports run on one or more entity records in Advance. Users should first perform an entity lookup or create a clipboard list of entities. From there, users click Actions – Reports and select from the Context Sensitive Report list.

CREDIT CARDS: A method of giving. CWRU can process VISA, MasterCard, Discover Card, and American Express credit cards. Advancement Services must be provided with the name as it appears on the credit card, the name and address of the donor, the credit card number and expiration date, and an amount to process this type of gift. It is not necessary to be in possession of the credit card. Extreme care must be taken in delivering credit card information to Gifts Processing. We must be careful to ensure that the credit card information does not fall into the wrong hands. Never email a credit card number to Gifts Processing. Please hand deliver or use the campus courier to deliver credit card information.

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CURRENT SUPPORT: Current support is a proposal code that would be used by a Major Gift Development Officer if they received an Annual Fund gift over \$10K while out on a personal solicitation visit. The Development Officer would receive credit for the gift in their performance report, but the funds would go towards the Annual Fund goal.

D DEVELOPMENT OFFICER: Also known as a Fundraiser. Annual Fund Officer and Major Gift Officer are types of Development Officers. Annual Fund Officers focus on raising money for the Annual Fund while Major Gift Officers focus on larger gifts, will commitments, endowments, professorships, special gifts, etc.

DEVREQ: Also known as Development Requests. Devreqs are adhoc reports generated by the Advancement Services technical team. Common devreqs include executing pulls not possible using standard Advance lookups, honor roll requests, creating or changing current reports, and suggesting possible changes to the Advance database. Email devreq@case.edu to submit a devreq.

DONOR: An entity (person, corporation, foundation or organization) that has given a charitable contribution to the University via a donation of cash, check, securities, pledge, gift-in-kind, etc.

DO NOT CALL FROM CALLING CENTER: Do Not Call is a solicitation code indicating entities should not be called by the Student Calling Center. Development Officers may contact them via telephone, however. When running lists, these entities are included in both "Reachable" and "Solicitable" categories.

E ECHELON RATING: Echelon Ratings can be found on the Entity Overview under Prospect Tracking, Demographic and are considered a type of rating used for prospecting purposes. Echelon Ratings are defined as the measure of a prospect's liquid asset values.

ENDOWMENT: A fund established to support particular programs, projects, or activities over an extended period of time. Endowment funds are invested and a percentage of the income is applied to purposes designated by the donor at the outset.

EX-DEGREES: In Advance, Ex-Degrees can be found on the following records: a current student (degree will have expected graduation info), a former student/non-grad (started at CWRU but never completed a degree), or a placeholder to associate someone with a particular class. Examples include: a student who started school with one class (2001), had to take time off for whatever reason, and therefore graduated with another class (2003). Although that student technically graduated with the class of 2003, they may chose to associate more with the class of 2001. When running a reunion years report, include ex-degrees to make sure they are included in the year they affiliate with.

EXPECTATION: Expectation is found on the Prospect Overview screen and is considered a type of rating used for prospecting purposes. Expectation is the amount expected to be raised by a Development Officer during the campaign period. This number is controlled by the Development Officer assigned to this prospect. If the DO feels this number is inaccurate, they should contact Stuart Oakes (dso@case.edu) to discuss.

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F FOREIGN CURRENCY: A method of giving. Foreign currency, US dollars drawn on foreign banks, and foreign “dollars” may all be submitted and treated as gifts. The internal procedures vary depending on the nature of the item submitted for processing, but the result is the same. The donor will receive credit in US dollars for the amount the gift is valued at, based on current exchange rates, as of the day of receipt. CWRU incurs what can amount to substantial bank fees to process these gifts. Foreign currency/checks drawn on foreign banks are assessed a per item handling fee. US currency items drawn on foreign banks will be assessed fees also. For this reason we should discourage a donor from sending a gift that is not in US denomination and drawn on a US bank.

FUND-RAISING EVENT: An activity sponsored by CWRU for the purpose of fund raising to benefit the University. In exchange for the price of admission, the donor generally receives a benefit or privilege.

G GGA RATING: GGA Ratings, aka Grenzebach Glier & Associates Ratings, can be found on the Entity Overview screen under Prospect Tracking, Evaluations and are considered a type of rating used for prospecting purposes. Almost all individuals in Advance were GGA Rated in 2005.

GIFT: A voluntary transfer of things of value from individuals, industry, foundations and other sources to the University for either unrestricted or restricted utilization in the operation of the University, for which the University has made no commitment of resources or services, other than the possible agreement to the designation of the use of the gift by the donor. Gifts usually take the form of cash, checks, securities, real property, or personal property. No one should make a gift to the University where he or she stands to receive private gain from the gift and the University should not accept such a gift or provide such assurances. CWRU is a 501(c)(3) tax-exempt organization and is qualified as such in that it is “...organized and operated exclusively for...scientific...or educational purposes... no part of the net earnings...inures to the benefit of any private shareholder or individual...”

GIFT ANNUITIES: In an annuity transaction, donors contribute cash, securities, or other assets to the university. In exchange, they receive annual payments for a fixed amount of time. With a deferred gift annuity, the annual payments do not start when the gift is made; they begin at a time specified by the donor when the gift is made. Gift annuities are attractive to donors who want to receive income from assets that have risen sharply in value, such as cash or stocks. In return for gifts of such assets, CWRU guarantees the donors a fixed annual income for the rest of their lives and helps the donor avoid capital-gains tax. The donor also gets an income-tax break on a portion of the earnings from an annuity; the exact amount depends on a donor’s age.

GIFT CLUBS: Gift clubs are a donor recognition grouping tool auto-populated by Advance based on a certain level of giving or a type of gift. CWRU Gift Clubs are: President’s Circle (1 mil+ lifetime giving to CWRU), Turning Point Society (100K+ lifetime giving to CWRU), Luminary Society (Any type of planned gift to CWRU).

GIFT RECEIPTS: Gift Receipts are generated daily for transactions of a gift or pledge payment. Receipts for non-annual fund pledges are also generated daily. The Student Calling Center generates pledge receipts for all pledges received through the Student Calling program. Receipts are an accurate reflection of how and when we processed a contribution and are acceptable for tax preparation purposes. The IRS has stipulated that a donor must possess an official acknowledgment for any gift in order to claim a charitable tax deduction. Receipts are generated daily during the nightly gift processing update. The forms are printed in the Advancement Services department. These receipts are then verified for accuracy and mailed by first class mail, normally within one business day of receipt. Receipts will reflect the value of the contribution received and the name of the fund to which the gift was applied. In cases of gifts of securities, the name of stock, number of shares, and the value date will be added. Gift-in-kind acknowledgments are also issued, but do not reflect any valuation in accordance with IRS rules. Instead, a description of the item given is provided.

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GIFTS-IN-KIND: Donated tangible and intangible assets and property such as art, books, equipment, automobiles, inventory, and other physical assets or materials which represent value to the University. Gifts-In-Kind are processed with their appraised value garnered from an independent appraiser. If no appraisal is available gifts-in-kind are entered with a value of \$1.00.

GRANTS: Received by the University from corporations, foundations, and other organizations, for the support of University programs and projects. Grants fall into two categories:(1) Non-Specific Grants are those received by the University in support of restricted programs or projects, but which do not result from a specific grant proposal. No specific resources or services are committed, and no accounting of the use of the funds is required.(2) Specific Grants are those received by the University in accordance with the terms of approved grant proposals for specific programs and projects. Commitments of University resources or services are made as a condition of the grant, and an accounting of the use of the funds may be required by the grantor.

H HONOR ROLL: The Honor Roll of Donors is a publication produced annually by each school within the university to acknowledge the many donors, alumni and friends who have donated to the university. Honor Rolls for campaign contributions or major gifts to the university may also periodically be produced.

I INTENTIONS: An intention is a verbal promise that is not legally enforceable. Intentions are entered into the system, but do not count towards goals or attainment calculations.

L LEGAL CREDIT: (Also known as Hard Credit) Legal credit is given to the entity from whom a contribution is received. Legal donors will receive the official CWRU tax receipt. Whoever writes and signs the check is the Legal Donor and will receive both Legal and Soft Credit for that gift.

LIFETIME RATING: Lifetime rating is found on the Prospect Overview screen and is considered a type of rating used for prospecting purposes. Lifetime Rating is defined as 3 to 5 percent (conservatively calculated) of demonstrated net worth. Lifetime Rating is what a prospect can be expected to expend philanthropically over the course of his or her lifetime to any charitable institution, not just CWRU.

M MAJOR GIFT PROSPECT: A prospect coded Major Gift indicates that CWRU will attempt to solicit, over the prospect's lifetime, a total lifetime giving sum of \$100K to \$1 million or more in donations to CWRU.

MATCHING GIFT: Matching gifts are gifts made by corporations that match the voluntary contributions of employees or other eligible participants.

MEMORIAL AND HONOR GIFT: Memorial and Honor gifts are given to the university in memory and/or in honor of someone. In memory denotes the person is deceased and in honor of implies the person is alive.

METHODS OF GIVING: CWRU accepts donations in multiple ways: check, cash, foreign currency (US dollars drawn on foreign banks), payroll deduction (CWRU employees), bank drafts (electronic debit from checking or savings account), credit cards (VISA, MasterCard, Discover Card, American Express), wire transfers (handled by CWRU Treasurer's Office), and securities (must contact the CWRU Treasurer's Office).

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N NO CONTACT REQUESTED: No Contact Requested is a code indicating these entities should never be contacted in any way (regular mail, email or phone). When running lists through clipboard these constituents are automatically removed so as not to receive mail pieces, phone calls or emails. Entities with this code are re-evaluated by Advancement Services only under specific request. In some instances these entities are deceased (however there are instances where an entity might be presumed deceased and coded NCR, but Advancement Services hasn't been able to confirm their deceased status yet). In other instances, the entity has personally instructed the University not to contact them for any reason.

O OPERATING FUNDS: Operating funds meet regular, ongoing expenses incurred in the general operation of the University. Operating Funds may be designated to specific purposes or for unrestricted use.

OUTRIGHT GIFTS: Outright gifts are contributions made by cash, check, credit card, stock transfers, wire transfers, and gifts-in-kind. (Pledge payments are not included in outright gifts).

P PAYROLL DEDUCTION: A method of giving. CWRU Employees are eligible to make charitable contributions to CWRU via payroll deduction. These are post tax deductions. Employees should contact Gifts Processing to set up a recurring deduction. The deductions occur every month for a pre-determined amount. The amount can be changed, and the deduction can be stopped at any time by contacting Gifts Processing.

PERMANENT NON-SOLICIT: Permanent Non-Solicit is a code indicating these entities should not be solicited at any time by anyone (Development Officers or Student Calling Center). Either the entity themselves or a Development Officer, after speaking with the entity, made the request that no solicitations should ever be made. These entities can still be invited to events and are mailed informational mail pieces about CWRU, alumni magazines, etc., but should never be solicited. When running lists, these constituents are included in the "Reachable" category only.

PLANNED GIFT: Also known as Deferred Gift. Planned Gifts differ from Outright Gifts because the benefitting nonprofit organization does not realize an asset until some point in the future. Examples of Planned Gifts include Will Commitments, Charitable Gift Annuities (CGA's), Trusts and Life Insurance Policies.

PLEDGES: Pledges are legally enforceable promises to give. The donor specifies that he or she will give a specific amount to a specific purpose sometime in the future and also specifies the payment schedule. There are Annual Fund Pledges and Non-Annual Fund Pledges. Types of pledges include: Straight Pledge, Conditional Pledge, Pledge Intention, and Will Commitment.

PLEDGE INTENTION: A donor's unconfirmed pledge to give to CWRU. Intentions are not legally enforceable because the donor has not provided the institution with a written intent to pledge. If a donor signs a letter of intent for a will commitment, but will not be age 70 by the year 2016, it will be entered as an Intention in the system. Intentions will not count toward goal or attainment calculations.

POOLED-INCOME FUNDS: The donor gives cash, securities, or other assets to a non-profit organization, which then invests those assets in a large, diversified portfolio. The donor receives income from the fund proportionate to the value of his or her contribution, as well as an income-tax deduction based on the estimated principal that will be left to the charity. Obtaining a "unit" in a pooled-income fund is similar to buying a share of a mutual fund. Like gift annuities, pooled-income funds appeal to donors who want to earn income on stock and other assets and escape capital-gains taxes. Unlike the annuities, a donor's income from a pooled-income fund is tied to fluctuating interest rates. That means that in the long run, donors may receive larger earnings than they do from annuities, but they can also do less well in the short term. As a result, the funds tend to appeal to younger people who are more often willing to take risks with their investments

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PRINCIPAL GIFT PROSPECT: A prospect coded Principal Gift indicates that CWRU will attempt to solicit, over the prospect's lifetime, a total lifetime giving sum of \$1 Million or more in donations to CWRU.

PRIVATE SUPPORT: Also known as Cash. Private Support is calculated by adding Gifts, Matching Gifts and Pledge Payments. Pledge payments made in the current fiscal year as well as pledge payments on pledges made in past fiscal years are included.

PRIZM RATING: PRIZM Ratings can be found on the Entity Overview under Prospect Tracking, Demographic and are considered a type of rating used for prospecting purposes. PRIZM Ratings classify thousands of neighborhoods in 66 lifestyle segments, each a distinct marketplace group. It provides a highly accurate measure of socioeconomic standing, philanthropic tendency, and lifestyle indicators. Variables include social rank, household composition, mobility, ethnicity, housing and urbanization.

PROPOSAL: A proposal is a formalized plan for a charitable gift. Both Annual Fund and Non-Annual Fund Proposals are entered into Advance. Annual Fund Proposals should only be entered if they are \$1K or more and are personally solicited by the AF Officer (not a result of a mass mailing). Non-Annual Fund proposals are generally considered Major Gifts and should be entered by the Major Gift Development Officer if they are \$10K or more. It is a DO's job to enter proposals and keep them up to date as they progress through the sales stages.

PROSPECT: A prospect is any potential donor whose linkages, giving ability and interests have been confirmed. Every prospect begins as an entity. Once an entity is identified as a prospect a Prospect Summary Record is created. If an entity is married, the spouses will be joined together as one prospect. There are three prospect levels: Special Prospects (10K – 99,999), Major (\$100K – \$999,999) and Principal (\$1M+). Certain prospects are coded Presidential Prospects, which are assigned to the President and are managed by the Senior VP or his/her assignee.

PROSPECT MANAGER: The prospect manager is responsible for coordinating all contacts of a philanthropic nature with the university. Requesting assignment as a prospect manager indicates an intent to solicit a special, major or principal gift from that prospect. There can only be one designated prospect manager, but multiple assistant prospect managers and an annual fund manager. All other claimants must abstain from soliciting a prospect without first consulting the assigned prospect manager.

PROSPECT/PROPOSAL SALE STAGES: The Sales Stage cycle is found both on the Prospect Overview screen as well as on individual proposals. The cycle follows this order: Qualification, Identified, Cultivate, Ready to Solicit, Solicited, Closure/Acceptance, Stewardship/Recultivate. There is also an additional stage of Stewardship for Life. Development Officers are responsible for updating the Proposal Sale Stages while the Associate Director of Prospect Management in Advancement Services is responsible for updating the Prospect Sales Stages.

Q QUASI ENDOWMENT FUNDS: The Board of Trustees, upon recommendation of Administration, can decide to retain and invest funds. There are two types of quasi endowments: unrestricted and restricted. Concerning the unrestricted, the Board has the right to decide at any time to expend the principal of such funds and to designate how the income is to be spent. As to the restricted, while the Board decides to establish an endowment account with the funds, neither the principal nor the interest may be used for any purpose other than that designated by the donor.

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R RAFFLE: A means of raising funds in which each participant buys a ticket for an article put up as a prize with the winner being determined by random drawing. Amounts paid for chances to participate in raffles or similar drawings, and amounts paid to participate in contests for valued prizes, are not regarded as gifts under IRS regulation and do not qualify as deductible charitable contributions.

REACHABLE: Reachable is a solicitation code which includes Do Not Call From Calling Center, Permanent Non Solicit, Temporary Non Solicit, and Blanks. Reachable should be used when pulling a list of event attendees or when creating a list to mail informational pieces, but NOT when soliciting money or for fundraising purposes.

RESTRICTED GIFTS & GRANTS: Given or paid to the University, wherein the donor or granting organization has specified that the gift or grant is to be used to support specific programs or projects.

S SOFT CREDIT: The Gifts System will create soft credit for every gift/payment equal to the primary legal gift/payment amount. This soft credit amount can be overridden to an amount less than the legal amount of the gift, but never in excess of the legal amount. If there are associated donors for a gift, the soft amount initially will be set equal to the legal amount of the gift.

SOLICITABLE: Solicitable is a solicitation code which includes entities coded Do Not Call From Calling Center and Blanks. Solicitable should be used when pulling a list of entities to solicit for donations.

SOLICITING DEVELOPMENT OFFICER: As CWRU is a collaborative fundraising environment, technically any Development Officer can solicit a proposal on a prospect as long as they have cleared it with the assigned Prospect Manager. In order for a fundraiser to receive credit for a proposal, a Soliciting Development Officer must be assigned on that proposal. The Soliciting Development Officer lists his or her name on the Proposals Assignment screen to ensure credit for that proposal.

SPECIAL GIFT PROSPECT: A prospect coded Special Gift indicates that CWRU will attempt to solicit, over the prospect's lifetime, a total lifetime giving sum of \$10K to \$99,999K in donations to CWRU. Anything under 10K lifetime giving to CWRU would be considered an Annual Fund Prospect.

STEWARDSHIP: Stewardship is a process whereby an organization seeks to be worthy of continued philanthropic support, including the acknowledgement of gifts, donor recognition, the honoring of donor intent, reporting on fund financial progress to donors, and the effective and efficient use of funds to further then mission of the organization.

STRAIGHT PLEDGE: A legally enforceable unconditional promise to give money to the University over a defined period of time (ideally not more than 5 years), to be paid solely with assets belonging to the individual or the organization. Straight pledges will count toward goals and attainment calculations. A pledge can be made only by the entity exercising legal control over the assets to be given. Therefore, an individual cannot make a pledge that includes anticipated matching contributions from an employer or some other source, nor can an individual commit funds that may be applied for through a donor advised fund or community foundation. An enforceable, countable pledge includes only those funds that will be given by a legal entity.

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T TEMPORARY NON-SOLICIT: Temporary Non-Solicit is a code which indicates these entities should not be solicited in the current fiscal year. These entities receive mailings from the University, alumni invitations, etc. When running lists, these entities are included in the “Reachable” category only, but not the “Solicitable” category. A note on the Mail Control Screen will indicate when/why the temporary non-solicit code was originally put in place. Advancement Services reviews the status of all temporary non-solicit entities and will change them back to regular mail to make them solicitable, again. Most entities are coded TNS because they are out of the country or are otherwise unavailable for a period of time.

U UNITRUST: Under a basic unitrust, the donor receives one or more yearly payments equaling a fixed percentage of the value of the asset. The value is assessed each year. Under a net-income unitrust, the donor receives only the income earned by the trust, even if the trust earns less than the payout rate. However, the trust can be set up to include a “make-up provision”, which allows the donors to make up the lost income, provided the trust earns more than the payout rate in future years.

UNRESTRICTED GIFT/BEQUEST: Given to the University, wherein the donor has not specified how the gift or bequest is to be utilized.

W WILL COMMITMENT: A will commitment is an intention to give a gift to CWRU after a person is deceased (through a will or estate plan). It will be entered into Advance if the donor expresses intent to give and provides either a copy of his/her Will or signs a Letter of Intent regarding the Will. If the donor specifies an amount of the bequest donation, the Will Commitment will be entered at the amount provided by the donor and will count toward goals or attainment calculations. “Active Will Commitment” means CWRU has yet to receive the assets from the Will. A donor of a Will Commitment must be 70 years of age by 2016 in order to have it entered on their record. If the donor will not be 70 years of age by 2016 the commitment is entered as an Intention.

WIRE TRANSFERS: A method of giving. A donor may wish to initiate a wire transfer to facilitate a gift to CWRU. This can be expected for large sums of money and particularly at the end of the calendar and fiscal years. Wire transfers are handled by the Treasurer’s Office. The office can be reached at (216) 368-4306. Advancement Services will be notified by the Treasurer’s Office when wire transfers occur. The gift will be recorded into the system with proper evidence of the wire transfer.

THANK YOU FOR PARTICIPATING IN SUNGARD
ADVANCE DATABASE TRAINING.

PLEASE CONTACT US WITH ANY QUESTIONS:
ADVANCETRAINER@CASE.EDU
216.368.4470