PMAT Quick Data Entry Guide

Task

Actions

How to Start

You can get to Actions from two places:

1. From the ACTION tab on a constituent's Record.

2. From the ACTION tab on a proposal record.

Remember

For individuals, A PMAT Action is personal contact made with a constituent. For CFR, a PMAT Action also details specific steps made in the grant writing process. PMAT Actions are NOT bulk mailings, event attendance, appeals mailed out

Phone Call: Used for phone calls of significance. Generally, an action should be entered for a prospect if an actual conversation took place with the prospect or if the phone call resulted in moving an agenda forward.

Mailing: Used for individual mailings (personalized correspondence). You can begin writing a letter directly from the Action screen. Simply select "Standard Letter" in the letter field and press the MS Word Icon next to the field, then begin typing your letter. When you're finished, make sure you select 'Save Letter to Action" at the top of the Word document. The Letter is then saved to the action.

Email: Like Mailing, used for individual emails (personalized correspondence). Currently, you cannot create an email from the action tab – you'll need to copy the email into the notes field.

Important Fields for Data Entry

GENERAL TAB

Key Fields	Data Tips
Category	• Task/Other is used only by CFR • Advocacy is not used.
Action Type	**PMAT: Introduction** Contact with unfamiliar or newly assigned prospects before a relationship with CalArts development exists. **PMAT: Qualification** Contact that attempts to determine a prospect's interests and giving capacity. **PMAT: Cultivation** Contact that is leading up to a solicitation with a prospect. Applies to established donors where staff expects to solicit in the near future. **PMAT: Solicitation** Used for contact that is directly related to an actual gift solicitation. This action type should not be used for contact that is leading up to the gift solicitation. **PMAT: Stewardship** Used for contact directly related to securing receipt of a gift commitment. Also used for contact maintaining established donor relationships, specifically related to endowed gifts or large capital gifts. **CFR Tasks:** Used to identify steps in the grant writing process (Report Due, Proposal Sent etc.) Other Non PMAT related Action Type: (Refer to Action Type documentation for more details) **Bulk Contact** **Event Related** **Non-Solicitation Related**
Action Date	Enter the date the action took place, NOT necessarily today's date.
Solicitor	This is a required field. The solicitor field is used to determine who is responsible for the action or who will get 'credit' for it. If more than one solicitor is listed, then multiple credits will be applied.
Completed On	Mark the action completed if it is in the past. A PMAT report will detail actions that remain incomplete after the action date has passed.
Proposal	If you created the action from the proposal, this field is already entered. If not and this action can be LINKED to a proposal, search for the proposal by clicking the search icon next to the field and then hit "find now".

NOTES TAB

Key Fields	Data Tips
Date and Type	Both of these fields are required. You can leave the date as it appears and choose the note type of "Contact" or "PMAT". These fields are not tracked but RE requires data in them.
Note Field	Enter a complete description of the contact. This will be the only record, so please be as precise and detailed as possible.

Where it is reported

Actions for prospects are collected and reported on two reports:

1. **PMAT Active Proposal Report**
Only actions that are linked to an active proposal will be reported. For example, if you enter a phone call action for a proposal that is active (ask date in the future), then that action will contribute the total number of actions for that proposal in the last 30, 60 or 90 days. Actions not linked to an active proposal will not contribute to the totals on this report.

2. PMAT Prospect Pool Report
All actions, with a PMAT action type or not, will contribute to the totals on this report. Actions are tallied for each Prospect Manager's pool, regardless of who initiated the action.

Listing your recent Actions
A an action query named: "PMAT Recent Actions AD" with the last two letters identifying the initials of the prospect manager will list all your recent actions (last three months).

Task	How to Start	Important Fields for Data Entry	Where it is reported

Proposals

How to Start

You must access a proposal or create a new one from the PROSPECT tab of a constituent's record. Choose Proposal on the left and click "New Proposal" to begin data entry.

Remember

Naming and Categorizing a Proposal

Proposals are identified and categorized using three fields, Name, Purpose and Focus. The three form a hierarchy of descriptions moving from the very broad to the very specific.
Purpose – the broadest category
Focus- a more specific categorization of a particular purpose
Name – highly specific and unique to each proposal

Marking a Proposal INACTIVE

Proposals should be marked inactive only when (a) a documented pledge has been recorded for the proposal or funds received (b) the proposal has been rejected and closed.

Uploading a Proposal Document in the MEDIA tab

Proposals should be uploaded in the Media tab once finalized and submitted. Operations will aid in completing this task.

Changing the Status of a Proposal

When changing the status of a proposal, you must add a note describing the change and the date of the change. This must be done for ALL status changes, even when initially adding a new proposal. Under the Note Tab:
1. Click on "New Notepad"
2. Choose a Proposal Note Type:
- Proposal Added
- Moved to 'in-progress'
- Moved to 'pending'
- Moved to 'commitment' or 'rejection'
- Proposal dropped

3. Enter the Date
No Description of Notepad text is necessary.

Important Fields for Data Entry

GENERAL TAB

Key Fields	**Data Tips**
Name	Proposal Name should briefly identify the proposal specifics. This field is printed on summary reports.
Purpose	Proposal Purpose categorized the funding intent of the proposal. In conjunction with the Focus field, purpose is the high level categorization used to subtotal active proposals for a given funding need. This field should not be used to identify highly specific funding issues. That information should be entered into the name of the proposal.
Focus	Used in conjunction with Purpose, Focus identifies the funding focus more specifically
Status	Status identifies the progress made on the proposal. It is extremely important that this field is accurately maintained. **BEFORE AN ASK IS MADE:** **Identified** Used to identify a new proposal. A proposal should have this status when initial work is in progress to organized dates, clarify funding interests and assign staff resources to the proposal. **In Progress** Used to identify the state when actual work has begun on the proposal, such as the preliminary writing process has begun, initial meetings and cultivation is taking place with the prospect. **AFTER AN ASK IS MADE:** **Pending** Used to identify a proposal that has been submitted or a solicitation that has been made. Pending refers to the time period when development is waiting on an answer to the proposal. **Commitments** Used to identify a proposal that has been accepted and commitment terms worked out. Proposal then remains active until all funds are received. **Rejected** Proposal has been rejected. **Deferred** Proposal has been rejected but a future solicitation has been encouraged. **IMPORTANT**: See "Changing the Status of a Proposal" to the left, for more data entry requirements.
Staff Mbr.	Staff Mbr. refer to the manager of the proposal. Often this is the same as the prospect manager. For CFR proposals, the solicitor should be the writer only. This field identifies on PMAT reports who is responsible for an active proposal.
Amounts Dates	Ask Amount and Ask Date refer to the solicitation/proposal amount and solicitation/proposal due date. These fields are REQUIRED. Expected Amount and Expected Date refer to the expected funding receivable amount and date.

Where it is reported

Proposals for prospects are collected and reported:

1. PMAT Active Proposal Summary
This report includes all proposals with a status of "Identified", "In Progress" or "Pending"

Listing your Active Proposal
A Constituent query named: "PMAT Active Proposals XX" with the last two letters identifying the initials of the prospect manager will list all your active proposals.

Task	How to Start	Important Fields for Data Entry	Where it is reported
Prospect Pool Mgmnt.	see below	see below	see below

Task: Prospect Pool Mgmnt.

How to Start

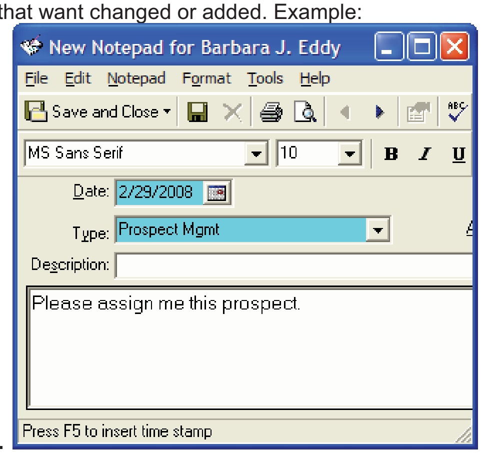
Prospects are assigned to or removed from a solicitor based on discussions at PMAT meetings.

The Director of Prospect Management and Research is responsible for the data entry necessary for pool assignment changes.

Remember

Requesting a Change in Assignment

To both add or remove a prospect from you pool assignment, enter a note under the NOTE tab on a Constituent's record with the note type of "Prospect Mgmt". Clearly describe in the Note box, what it is that want changed or added. Example:



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Requesting Research for an Assigned Prospect

Similarly, add a note on the constituent's record with a note type of "Prospect Mgmt" and then clearly describe your research needs.

Operations staff will process your request as soon as feasible.

Important Fields for Data Entry

NEW PROSPECT

Once a prospect has been identified, two areas of data entry are required:

PROSPECT GENERAL TAB

Key Fields	Data Tips
Classification	Classification details a prospect's capacity to give as judged by contact with the prospect, research and giving history. Capacity is for the remaining life of the current campaign and includes annual, endowed and capital gifts. • **Principal Gift ($1M+)** • **Major Gift ($25k-$1M)** • **Special Gift ($5k-$25k)** • **Annual Gift ($1k-$5k)** • **Planned Giving Prospect**- The prospect's main vehicle for gift commitment is estate based giving. • **Not a Prospect**- Not a prospect for the current campaign.
Status	Status refers to a prospect's rating of giving capacity. Values are high probability of a gift commitment, medium probability and low probability. "No Gift Expected this Campaign" refers to a prospect who either is not ready for a gift during the remaining life of a campaign or who has stated no further giving will take place during the remaining years of a campaign

RELATIONSHIP TAB (Assigned Solicitor)

Key Fields	Data Tips
Solicitor Type	Choose "Prospect Manager"
Solicitor	Either enter the name of the prospect manager or search for the name.
Date From	Add the active from date

CHANGING PROSPECT MANAGER / REMOVING A PROSPECT

RELATIONSHIP TAB (Assigned Solicitor)

Key Fields	Data Tips
Solicitor Type	Chose "Previous Prospect Manager"
Date To	Add the active to date

If adding a new prospect manager follow the instructions above.
If the prospect is no longer considered active for solicitation, then the classification must be changed as well.

Where it is reported

Your prospects are reported on the:

PMAT Prospect Pool Report

Listing your Active Prospect Pool

A constituent query named: "PMAT Active Pool AD" with the last two letters identifying the initials of the prospect manager will list all your assigned prospects.

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