Prospect Classification and Prospect Status

**Classification** will be used to track where a prospect is in the screening/confirmation process.

- **Prospect - Screened** - Initial value for prospects segmented/rated through Blackbaud or any other source going forward.
- **Prospect - Research Confirmed** - Set by Prospect Research and used for **Proactive Leads only**.
- **Prospect - DO Confirmed** - Once assigned, the DO will set this value to confirm a prospect is a Major Gift prospect.
- **Not a Prospect** - A DO or Prospect Research has determined that an entity will never be a prospect for Clemson.

**Prospect Status** will be used to track where a prospect is in the Prospect Life Cycle.

- **Lead** - Initial value for all prospects segmented/rated through Blackbaud and for all prospects not yet visited
- **Attempting** - DO is attempting to contact prospect but has been unable to set up a Discovery visit. Attempts must be recorded in RE.
- **Discovery** - The DO Confirmation step is in progress (see classification of “Prospect - DO Confirmed”).
- **Cultivation** - DO is building relationship and moving prospect closer to making gift.
- **Pre-Solicitation** - Prospect is cultivated and DO is within 1 to 2 meetings of asking for a gift.
- **Decision Pending** - Prospect has been formally solicited and is considering the proposal/making a gift.
- **Short-term Stewardship** - Gift made and donor stewarded before returning to cultivation status for next gift. **(Maximum of 5 years)**
- **Permanent Stewardship** - Donor has made their transformational gift, but will need periodic contact for an extended period of time.
- **Not Right Now** - DO has determined that now is not a good time. This will be tracked & DO will re-evaluate after x years.

**Entering Classification and Prospect Status in Raiser’s Edge**

**IMPORTANT:** Both values need to be entered and maintained by the DO for all the DO’s primary assigned prospects.

1. Open the constituent’s record and go to the **Prospect tab>General**.
2. Select values for Classification and Prospect Status from the corresponding drop-down menus on the right.