

CHANCELLOR'S PROSPECTS AND OTHER VIPS: POLICY

Job Aid

WHAT IS THE PURPOSE OF THIS POLICY?

Goal: To improve coordination, communication, and management of VIP prospects. Further, we hope to maximize the philanthropic investment with the UW Madison through active collaboration of WFAA staff and campus partners.

Guiding Principles: The UW Madison's most important prospects benefit from strong coordination. It is important that development leadership be aware and knowledgeable of cultivation milestones, as leadership is in frequent communication with these VIPS.

Coordination: The Prospect Manager will act as the point of contact when requesting plans or solicitations for these constituents. Individual plan managers will work closely with the Prospect Manager to execute a strong comprehensive development strategy.

Visibility: A label (prospect status) will be surfaced on the prospect page of a constituent to alert staff that this individual is a member of one of these VIP groups. Spouses and associated family foundations will all have the same prospect status and Prospect Manager. Because only one label can be applied, they will work as a hierarchy. A Chancellor's Level 1 prospect may also be a part of the WFAA Board or VHS, however their group will reflect the Chancellor's Level 1. Similarly, if an individual is a WFAA Board member and also a VHS member, their group will reflect WFAA Board.

Additionally, the name of the designated Prospect Manager responsible for coordination is visible on the prospect page.

VIP GROUPS

VIP group	Coordination necessary	Has Prosp. Mgr.	Prospect status
Chancellor's Prospect, Level 1	Plans/solicitations approved by Chan., Mike	Y	VIP, Chancellor 1
Chancellor's Prospect, Level 2	Plans/solicitations approved by Mike, notify Chan.	Y	VIP, Chancellor 2
Chancellor's Prospect, Qualification	None	Y	VIP, Chancellor Qualification
WFAA Board Member	Mike notified of solicitations	N	VIP, Other
Van Hise Society Member	None	N	VIP, Other

Chancellor's Prospect, Level 1	These constituents are the University's top institutional prospects and Chancellor Blank is in regular communication with these individuals. Because cultivation of these prospects requires significant coordination and preparation, the creation of plans and any associated solicitations must be coordinated and approved by Chancellor Blank and Mike Knetter. A Prospect Manager is designated to coordinate the engagement efforts for these individuals.
Chancellor's Prospect, Level 2	These prospects are very high-capacity individuals who are engaged with multiple areas on campus. Chancellor Blank will be made aware of any solicitation presented to these individuals. All plan creation or solicitations must be coordinated and approved by Mike Knetter. A Prospect Manager is designated to coordinate the engagement efforts for these individuals.
Chancellor's Prospect, Qualification	These prospects not yet engaged with the Chancellor, but the Chancellor may be key to opening doors for engagement. Additionally, she may be available to connect with constituents when prompted by development staff as her schedule permits. A Prospect Manager will coordinate the engagement efforts for these individuals.
WFAA Board Members	Our WFAA board members are highly engaged with development leadership and careful coordination in their cultivation is essential. As such, Mike Knetter will be made aware of all solicitations.
Van Hise Society Members	These prospects may receive reactive contact from Chancellor Blank. Additionally, she may be available to connect with constituents when prompted by development staff as her schedule permits. Plan creation and solicitations may proceed without notification or approval from Chancellor Blank or Mike Knetter.