Advancement Services | Seattle University

Storage of all Donor Proposals - Foundations, Corporations and Individuals

1. Continue with storage of hard copies until such a time as SU develops a policy for electronic vs. hard copy data management.

2. Store all proposals presented to prospects on the T drive:
   T:\University_Advancement\Campaign_Operations\SHARED\Donor Proposals

   There are three subfolders depending on the type of prospect presented--one for foundations, one for individuals/major gifts and one for corporations.

3. Use the following naming convention:

   - For an unmarried prospect:
     Prospect's Last Name, First Name - date proposal was submitted
     Ex: Ford, Karen E. – proposal 9.18.04

   - For a prospect couple:
     Last Name, First Name – date proposal was submitted
     Ex: Sinegal, James & Janet – proposal 9.18.04

   - For a prospect couple with two different last names:
     Last Name, First Name & Last Name, First Name – date proposal was submitted
     Ex: Goldman, Peter & Kongsgaard, Martha – proposal 12.8.05

   Note: When deciding which spouse name to put first, chose the spouse with an RE record, or if both have records, chose the male name first.

4. You may add the name of the proposal to your document name. Place the proposal name before the word "proposal."
   Ex: Paul G. Allen Foundation – Library proposal 8.28.06

5. Use common sense. If the prospect's name is a common name enter a middle initial or other identifying info.
   Ex: Anderson, Mary W. – Nursing proposal 5.5.05

   If the prospect is known more often by a nickname, use both the formal name and the nickname.
   Ex: Alvord, Elsworth "Chap" – Center for the Arts proposal 4.4.04