

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
Acknowledgement	Correspondence sent to donor as an expression of gratitude for gift or service.
Acquisition Mailing	A mailing to prospects to acquire new donors or new gift club members.
Actively Managed Prospects	Households/individuals with active plan(s) as defined by Plan & Prospect Management.
Actuarial	In a planned giving context, the factors used to calculate the value of lifetime payments based on the life expectancies of income beneficiaries or the term of years for a trust.
Adjusted Gross Income (AGI)	A person's total gross income adjusted for specific deductions allowed by the tax code, before subtracting standard or itemized deductions. Individuals may deduct charitable cash contributions up to 60% of AGI in any given tax year and, for gifts of appreciated property, 30% of AGI in any given tax year. Deductions that exceed the limitation in any calendar year may be carried forward for an additional 5 years.
Administrator	The person, appointed by a court, to settle the affairs of a decedent who dies without leaving a valid will. The duties of an administrator are quite similar to those of an executor, but because his or her powers and rights come from state law, they are often far more restricted than those generally given to an executor by a professionally prepared will.
Advance Gifts or Reach backs	Strategically important gifts solicited in advance of the formal public beginning of an intensive campaign to insure a level of giving equal to the requirements of the campaign dollar objective.
Advancement	Encompasses fundraising, alumni relations and marketing.
Advancement Fund	Unrestricted gifts that have been made to the University. It is used at the discretion of the University President, Chancellor, or Dean to supply flexible, immediate funds, as they are needed.
Affiliated Organization	This is normally a unit that is legally separate from the University; however, is closely associated to the University and assists the University in meeting its goals. Examples include the Alumni Alliance and the Foundation.
Affiliated Unit	Any unit with which a prospect has a recorded affiliation.
Affiliation	Displayed or implied affinity to a unit.
Allied Agency	Used interchangeably with Affiliated Organization and University-related Organization.
Alumni	Former University students (full or part-time, undergraduate or graduate) who have earned some credit toward a degree.
Alumni Census	Questionnaires mailed by the Alumni Association to alumni to collect demographic information. Information collected is used to update constituent records.

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Annual Meeting (Foundation Weekend)	A three-day series of events held on the Urbana- Champaign campus typically during the fall which includes the Annual Meeting of the Foundation membership. Invitees include all Presidents Council members, Foundation Board of Directors, Deans and Directors from all three campuses, Trustees, special guests and some development officers from all three campuses. The weekend usually begins on Thursday afternoon with a dedication and ends Saturday afternoon with a brunch at the President's home and a football game.
Annual Giving / Annual Gifts	Mass solicitation of constituents for gifts below \$25,000 utilizing marketing efforts to solicit via various channels and tactics to obtain annual gifts. These are gifts from any source (i.e., individuals, foundations, corporations, organizations) generally of a recurring nature.
Annual Report (UIF)	The University of Illinois Foundation produces an annual report that presents the activity for the fiscal year. It includes a report on the endowment as well as financial updates for the fiscal year. It is mailed to select constituents and is posted on the UIF website.
Annuitant	An individual who receives or who is scheduled to receive annuity payments from a charitable gift annuity.
Annuity	In the context of gift planning, a charitable gift annuity is a contract between the University of Illinois Foundation and Donor to make payment on a periodic basis (generally quarterly) to an income beneficiary(ies) selected by the Donor for the beneficiary(ies)' lifetime. Charitable gift annuities are a legal obligation of UIF and are a general obligation of UIF.
Appeals	Solicitation or marketing effort specific to each unit per fiscal year and contains the default designation for gift processing. Appeals are applied to all marketing efforts.
Appraisal	A professional assessment of a piece of property's value. Generally, donors contributing real or tangible personal property (e.g.: books, collectibles, etc.) worth \$5,000 or more must secure an independent appraisal of the property to substantiate the value claimed as a charitable deduction.
Appreciated Property	Securities, real estate, or any other property that has risen in value since a person acquired it. Generally, appreciated property held by a person for more than a year and one day may be donated at full fair market value without the donor incurring capital gains tax. This is referred to as long-term capital gain property.

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Assessment	Prior to beginning a plan, the constituent must be assessed for affiliation with the fundraiser's unit, if there are any other active plans on the record, or if any other gift officer is currently in contact with the constituent. During the assessment stage, the individual record for a constituent, and his/her spouse if applicable, are reviewed for affiliations with a specific unit. Affiliation includes any donations, degrees, volunteer hours, or employment with a specific unit. Affiliation can be with multiple units or universities. The constituent's household record should be reviewed for any active plans. Interactions with the constituent should also be reviewed from the constituent's household record as this information will determine if the fundraiser can move to the Qualification stage.
Assistantship	Financial award to a graduate student with an expectation of service. The service can be teaching or research. (See Fellowship)
Attempted - Not Reached	When the gift officer has attempted to reach the constituent through various means but is unable to make direct contact with the constituent, either because the communication is returned (email bounce back or returned mail) or requests for communication are not returned.
Audit	A formal examination and verification of financial accounts. (The Foundation participates in audits by independent accounting firms.)
Award	A generic term for anything of monetary value given to a faculty member or student.
Bargain Sale	A bargain sale is the sale of property or an asset at less than its fair market value. Frequently, a person will sell property to a non-profit organization at a "bargain" (an amount significantly less than the market value of the asset). The transaction then is partly a gift for income tax deduction purposes and partly a sale.
Basis (or Cost Basis)	A person's purchase price for an asset, possibly adjusted to reflect subsequent costs or depreciation. (e.g.: if a donor buys stock for \$100 per share and sells it for \$175, the cost basis in the stock is \$100 per share.)
Beneficial Interest in Trust	The Foundation has only a perpetual income interest from a trust, which is managed by an independent trustee. Normally, the Foundation does not receive the assets of the trust, just the income stream.
Beneficiary	The recipient of a bequest from a will or a distribution from a trust, retirement plan, life insurance policy, or some other contractual agreement.
Bequest	A transfer of property or cash to an individual or organization under a will or trust.
Book Value	Also referred to as fund balance, principal and corpus. Represents the fund balances in each endowment account resulting from gifts originally received from the donor, funds transferred from a department or income permanently reinvested.

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Business Reply Envelope (BRE)	A self-addressed envelope that has postage printed on it so the recipient does not need to affix a stamp. Use of a BRE requires a permit applied for through the United States Postal Service. The receiving organization guarantees payment of postage on receipt.
Camera-Ready Art	Perfectly positioned artwork containing the copy set in type, the placement of correctly sized photographs or illustrations, and specifications for the printer to convert the artwork to film then to plates for printing. Also referred to as a "Mechanical," "Boards," "Keyline," "Paste-Up" and "Finished Art".
Campaign for Illinois	This was the first major fundraising campaign for the University of Illinois. The goal was \$100 million to be raised between 1979 and 1984. Actually \$132 million was subscribed and an additional \$151.3 million of continuing support was recorded during the five-year program.
Campaign Gifts	Those gifts, commitments, and pledges that qualify for counting hereunder per the University of Illinois and University of Illinois Foundation Gift Acceptance Policies, Procedures and Guidelines.
Campaign Illinois	This was the second major fundraising campaign in behalf of the University of Illinois driven by the University of Illinois Foundation. The campaign began January 1991 and concluded December 2000 and raised \$1.53 billion.
Campaign Period	The period of time for which gifts are counted in a campaign. The current campaign period is between October 2017 and June 2022 for individual campaigns for each of the System's universities in Chicago (IGNITE campaign); Springfield (Reaching Stellar campaign); and Urbana-Champaign (With Illinois campaign).
Campaign Progress	Shall mean the cumulative total of gifts, commitments, and pledges coded with a campaign tag.
Campaign, Capital Campaign	An intensive fundraising effort to meet specified dollar needs related to a specific purpose. This may be a "Capital Campaign" focused on building construction, expansion, remodeling; or equipment acquisition; or, be a general campaign to raise endowment funds, scholarships, faculty support, etc.
Campus Visit	A face-to-face visit where a donor returns to any of the University campuses.
Capital Gains Tax	A federal tax on the appreciated value of an asset between its purchase and sale prices. There are two types of capital gains tax – long-term (held for more than 12 months) and short-term (assets held for less than one year). Long-term capital gains tax rates are lower than short-term capital gains tax rates which are taxed at a donor's ordinary income tax rate.
Carrier Envelope	The outside envelope that contains the appeal letter and other components of the direct mail solicitation package. Either "Closed Face" or "Window" envelopes are used depending on addressing and personalization methods.

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Case	The reasons for a non-profit organization's appeal; justification for its position that it merits gift support.
Case for support	The reasons for a non-profit organization's appeal; justification for its position that it merits gift support.
Case Statement	Explanation of the "case" in typewritten manuscript form. After approval by the administration and the governing board, the case statement becomes the "copy platform" for all communications materials prepared in a fund drive.
Cash (in reporting)	Cash (in reporting) includes current income from outright gifts and private grants in a given year, as well as pledge payments, irrevocable deferred payments, and estate distributions. Cash excludes non-gift revenue, contract payments, and commitments such as pledges and grant awards that have not yet been paid.
Cash Gift	The simple transfer of cash, check, credit card or currency to a non-profit institution.
Charitable Deduction	The deduction allowable for gifts made to qualified charitable organizations. If a gift is made during a donor's lifetime, it may qualify for income-tax and gift-tax charitable deductions. If it is made at the end of a donor's lifetime, it may qualify for an estate-tax charitable deduction.
Charitable Gift Annuity (CGA)	A simple agreement between the University of Illinois Foundation and a donor to pay a fixed sum of money to an individual at regular intervals in exchange for a gift of at least \$10,000 cash or marketable securities.
Charitable Gift Annuity Pool	The invested funds from all CGAs managed by the University of Illinois Foundation.
Charitable Lead Trust	Another form of charitable giving, perhaps less known and less often used than most forms, is the contribution of an income interest to a qualified charitable organization. Such gifts are made by a transfer of property into a trust, commonly known as a charitable lead trust, at which time an income interest in the property is donated to a charitable organization for a period of years or for the life or lives of an individual or individuals. The remainder interest is either retained by the donor or given to a non-charitable beneficiary (usually a family member).
Charitable Remainder	The property that is distributed to charity when a split-interest/life-income gift terminates. (For example, a donor may give an asset to the University of Illinois Foundation to fund a charitable remainder trust that pays the beneficiary a life income and then distributes the trust principal and undistributed income to the Foundation at the end of the income beneficiaries' lifetime or after a predetermined period of years. The property that passes to the Foundation is the charitable remainder.)

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Charitable Remainder Annuity Trust (CRAT)	A charitable trust established by a donor where one or more beneficiaries will receive an income for life or a term certain (not to exceed 20 years) and the remainder is distributed to the University of Illinois Foundation. CRATs pay a fixed dollar amount to the beneficiaries each year (at least 5 percent of the initial fair-market value of the transferred property.).
Charitable Remainder Unitrust (CRUT)	Similar to a charitable remainder annuity trust except that the payment to beneficiaries is determined by multiplying a fixed percentage by the fair-market value of the trust assets as revalued each year. The fixed percentage must be at least 5 percent.
Closure	When a plan has been completed due to acceptance, rejection, or cancellation by the fundraiser, the plan needs to be closed. This process includes linking the gift to the opportunity, completing or deleting any steps on the plan, and making the plan historical.
Codicil	A document that amends a previously-executed will. Amendments made by a codicil may add or revoke a few small provisions (e.g., changing executors) or may completely change the majority or all of the provisions, including any gifts under the will. Each codicil must conform to the same legal requirements as the original will (such as the signatures of the testator) and, typically, two or three (depending on jurisdiction) disinterested witnesses.
Commitment (Charitable)	The promise of a prospect to provide a charitable organization with something of value, generally within a specified time. A commitment can take the form of a written pledge, a letter of intent, a will document, or a similar communication. The sum of donor commitments, including gifts, pledges, bequests, gifts-in-kind, etc., is usually the comprehensive term used to describe total campaign attainment rather than just the term "gifts and pledges."
Constituent	Can be an individual or an organization. A constituent is an entity that has a record in TED.
Constituent Unit	This is a department, college, school, division, center or institute of the University of Illinois.
Corpus	The principal or capital, as distinguished from the interest or income, of a fund, estate, investment, or the like.
Council for Advancement and Support of Education (CASE)	CASE is a national organization for development, alumni and public affairs, and institutional management professionals. Jim Moore, President/CEO of the UI Foundation has served on the CASE Board of Trustees since 2010 and is currently serving a two-year term as Chair.
Count	A count of all of the records or households gathered from TED or WebTools for a mass communication.
Counts Date	Day preliminary counts are due to the requester. Counts are mostly for planned efforts, but sometimes for work orders (for mass communications).

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Courtesy Reply Envelope (CRE)	A type of reply envelope. This version of the reply envelope requires the recipient to affix a stamp before mailing back.
Criteria	The parameters of a mass communication; determines who will be contacted.
Cultivation	Process of promoting or encouraging interest and/or involvement on part of a potential donor or volunteer leader; an educative process to inform about an institution, reasons why it merits support. During the Cultivation stage, the gift officer in conjunction with the prospect management team create a relationship with the constituent with the ultimate goal of making a solicitation or ask on the constituent. Cultivation strategies are made up of a set of complex steps including an opportunity. The strategic steps can change based on the type of solicitation being made, the type of relationship with the constituent, and constituent's ultimate goal when donating.
Current Use Funds	These are funds intended to be used for operations during the current fiscal year.
Deferred Gift	A commitment or gift established during a donor's lifetime, the principal benefits of which do not accrue to the institution until some future time, usually at the death of the donor and/or his income beneficiary.
Deferred Gift Annuity/Flexible Deferred Gift Annuity	A simple agreement between the University of Illinois Foundation and a donor to pay a fixed sum of money to an individual at regular intervals in exchange for a gift of at least \$10,000 cash or marketable securities. Payments to the beneficiary (ies) will start at a pre-selected date at least a year in the future or, in the case of a Flexible Deferred Gift Annuity, within a specified later time frame.
Designated Funds	Funds under the control of the governing body, e.g. University Board of Trustees, Foundation Board of Directors, which have been earmarked for a specific use.
Designation Number or Default Designation	The eight-digit number housed in the appeal. A default designation is required, even if the mass communication is not a solicitation, in case a donation is made. This allows the gift processing department to process the gift.
Development	Refers to all of the dynamics of a continuing fundraising program (annual giving, special gifts, deferred gifts, public relations) as opposed to the intensive, short-term campaign.
Development Council (DC) – university specific	UIC - This group, chaired by the Vice Chancellor for Advancement, consists of Advancement team members who carry a major gift portfolio. The group meets every 8 weeks and addresses university fundraising strategies, policies and procedures. UIS - This group is called UIS Advancement Council and is composed of heads of academic, student affairs, communication, alumni relation, auditorium, public radio and similar units that have a direct relationship

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	<p>with fundraising. Typically attending is the provost, deans, directors and development officers. This quarterly meeting is used for development training, discussion, information dissemination, and shaping of campus practices.</p> <p>UIUC - This committee is chaired by the Urbana Associate Chancellor for Development and is composed of the chief development officers of the major academic units. The committee focuses on the operation and coordinative aspects of private gift fundraising.</p>
Devise	A gift or disposition of lands or other real property by a last will and testament.
Direct Mail	Solicitation of gifts or volunteer services and distribution of informational pieces by mass mailing.
Directory	A directory is defined as any public listing, online or in print, of an individual's personal or business contact information, career history, degrees, activities, or other identifying characteristics.
Distinguished Lectureship	Plays an important role in the academic life of the campus. Allows faculty and student to interact with distinguished leaders who influence disciplines, society, the nation or the world. Provides the resources to cover the expenses of bringing renowned speakers to campus. Minimum Gift: \$250,000.
Donee	The person or organization who receives a gift or charitable commitment.
Donor	The person who makes a charitable commitment; one who contributes something, such as money to a cause or fund.
Donor Recognition	Calls attention to the fact that a donor has made a gift. When properly used this basic motivation becomes a powerful fundraising tool.
Donor Relations	Planned program of maintaining donor interest through acknowledgments, information, personal involvement, and so forth.
Download Date	Day the file is due to the requester and timed to allow for review prior to the launch date.
Drop Date	The day on which a mailing package is entered into the postal system. Also known as "launch date".
Effort Specifications (ES)	A document with details for the mass communication programmer. Includes criteria, solicit codes, vendor, etc.
Eleemosynary	Having to do with, derived from, or dependent upon philanthropy.
Email	In TED interactions, this refers to a personal email sent to or received by the constituent or household. Mass communications should not be tracked in Interactions / Plan Steps.
Endowed Chair	Represents the highest honor the University can confer on prominent faculty members. Endowed Chairs serve as an effective tool with which to attract and retain scholars of proven brilliance. These positions enable the most gifted faculty members, deans, directors and department heads to excel in their scholarly activities. Income from Endowed Chairs may be

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	used to provide partial salary support and help fund professors' teaching and research requirements. Minimum gift: \$2 million.
Endowment	Principal or corpus maintained in a permanent fund to provide income for general or restricted use of agency, institution or program.
Endowment Budget	Also referred to as annual budgeted income or spending allowance. Represents the annual amount available to the beneficiary of the endowment fund for spending in accordance with the donor's restrictions.
Endowment Fund	An invested fund owned and administered within the University of Illinois Foundation from which the capital appreciation and/or income is used to support the general or specific objectives of that Foundation's mission and donors.
Endowment Pool	The method of investing funds whereby the assets of numerous endowment funds are invested together and managed by a professional money manager, such as a bank. Each endowment fund owns shares, which represent its pro-rata interest in the pool.
Estate Planning	The detailed, planned analysis and arrangement of an individual's financial resources designed to achieve personal and family goals during lifetime and satisfy intentions relative to designated beneficiaries through the distribution of property at death.
Estate Tax	A tax on the value of the property held by an individual at one's death. It is paid by the individual's estate, not the heirs or recipients of bequests.
Estate Tax Exemption	An amount excluded or subtracted from an estate's gross value for purposes of calculating the tax owed at the federal and/or state level.
Event	An event sponsored by any unit that the constituent or the household members attend.
Executive Operations Team (EOT)	The senior leadership group for the UI development program. This group is headed by Jim Moore and typically meets each Monday.
Executor	The person named in a will to administer the estate in question (known in some states as the "personal representative").
FACTS (Foundation Alumni Constituent Tracking System)	This was the historical University electronic data processing system, which maintained donor and alumni records. FACTS was retired and replaced by TED, the Tracking and Engagement Database in November 2015.
Fair Market Value	The price an asset brings on the open market.
Federal Insurance Contribution Act (FICA)	This is the law that established Social Security.
Fellowship	Financial award to a graduate student usually including a stipend and payment of tuition and fees. Provides a vital means of bringing the best and brightest students to Illinois. Minimum Gift: \$250,000.
Fiduciary	A person who acts on behalf of another, usually in a financial matter.

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Financial Statements	A comparative report that shows Foundation net assets and operating results, prepared in accordance with GAAP (generally accepted accounting principles). It also conforms to Governmental Accounting Standards because the University, as a component unit of the State of Illinois, is required to follow governmental standards.
Finder Number	The code a donor uses to get to their PURL (personalized URL). Finder Number is also known as Webcode.
Fiscal Year	The official reporting period for the University of Illinois and for the Foundation. It begins on July first and ends on the subsequent June 30.
Focus Event	A regional event targeted at major donors and major donor prospects.
Form 990	The Foundation's tax return. It is an information-only report because the Foundation is exempt from income taxes as a charitable organization described in section 501 (c) (3) of the Internal Revenue Code.
Foundation Member (FM)	Foundation members have an ongoing engagement with the University characterized by extraordinary financial support, advocacy and involvement. The Foundation's Board Membership and Governance Committee takes responsibility for recruiting, nominating and electing members.
Friend of the University	This is an individual who has contributed to the University but is not an alumnus or alumnae of the University.
Fund Agreement	This agreement establishes the guidelines for the operation of a gift fund established by a donor, usually an endowment or quasi-endowment. This agreement is between the donor & UIF with a signoff from the benefiting unit that they will adhere to the donor's intentions.
General Information	Relevant and useful general information provided by the constituent or the household members.
General Interactions	General Interactions should be used when documenting a communication with the constituent that is important to note but not related to a plan or a gift. General Interactions do not move a gift or a relationship forward. This category should never be used on a prospect plan of any kind for any reason. General Interactions are added directly to the constituent's household record and display on the Documentation and Interactions tab under the Interactions sub-tab.
Gift Acceptance	This is the formal procedure of the University of Illinois Foundation, which is the mechanism for determining if the gift is appropriate and can be used. The Foundation confers with the University on any issues that may be problematic in accepting a gift.
Gift Receipting	The process of generating a receipt form for every gift made to the Foundation or the University.
Gift Receiving	This occurs when a gift is physically delivered to the Foundation or University. It should be distinguished from acceptance and receipting.

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Gift-In-Kind	This is a gift of contributed services or other property of value other than cash or securities. For example, supplies, equipment, real estate, and objects of art are included. The value of the gift is established by independent appraisals. (Gifts of services are not deductible).
Governing Document	The underlying documentation that establishes the guidelines for a gift fund. This could be a Fund Agreement, Statement of Gift, letter of purpose, solicitation, or other written documentation of the original donor intent for the fund.
Grant	A grant usually carries conditions imposed by the donor requiring very specific actions including reporting on the part of the University.
Grantor	The individual transferring property into a trust.
Grids	Encompass all of a unit's preplanned mass communication efforts (solicitations and non-solicitations) and are prepared before the fiscal year begins.
Gross Estate	Includes everything in which the decedent owned an interest at his or her death, embracing life insurance, joint property, and transfers made in contemplation of death or intended to take effect at or after death, or where the power to change the enjoyment of property has been retained.
High Profile Campus Visit	A visit to a University campus by a constituent that includes a meeting with high-level University personnel such as the Chancellor or President.
Honorarium	A payment which may be gifted to the Foundation. Honoraria are frequently received by faculty members in the normal course of their work.
Honorary Gift	A gift made in honor of someone else and/or his/her accomplishments.
Household Giving	Household giving captures individuals' and organizations' total philanthropic commitments to the University of Illinois System (including the three Universities, Alumni Alliance and Foundation). Household Giving data includes revenue from the Outright Gifts, Pledges, Planned Gifts, and Grant Awards categories, which closely correlate to New Business. Household Giving data includes Direct (Self Credit) and Indirect Credit Types (Spouse/Life Partner Credit, Partner/Owner Credit, Grant Awards, Contract Awards, Outright Gifts, and Soft Credit) recognition types. Household Giving data excludes non-charitable giving such as event registration fees.
IGNITE The Campaign for UIC	Each university in the University of Illinois System has a unique and individual campaign that officially launched in October 2017, and continues thru June 2022. The Chicago (UIC) campaign goal is \$750M for <i>IGNITE The Campaign for UIC</i> .
Income Interest	The right to receive payments from the trust for the recipient(s)' lifetime(s) or a term of years.

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Internal Meeting	A meeting that takes place with parties internal to the University to advance the strategy for the prospect. Examples include strategy sessions, meeting with dean, faculty and advancement staff to determine appropriate funding opportunity, script & prep meeting with leadership, etc. Each participant in this meeting should be added as a step participant (faculty, non-advancement staff, other) or secondary solicitor (advancement staff, dean, chancellor).
Inter-Vivos Transfers	Transfers of property made during one's lifetime as opposed to testamentary disposition.
Intestate	Dying without a legal will or living trust.
Irrevocable Gift	A gift that cannot be annulled, undone, or changed.
Jointly Owned Property	Property owned by two or more persons, usually with the right of ownership in the one or ones who survive; normally unaffected by a will. In certain states, however, it may be willed under well-defined circumstances. Inherent in most joint ownership arrangements is automatic passage of sole and absolute ownership to the surviving joint owner when one joint owner dies. Except where a married couple is involved, jointly owned property is included in the estate of the deceased to the extent that the deceased provided the resources to secure the property.
Lapsed Donor	Those donors who have given two to three fiscal years ago, but not since.
Launch Date	Day a mass communication effort goes live, either through email, telemarketing, text, or direct mail.
Layout	The hand-drawn composition of copy, art and photographs, which indicates how a proposed printed piece will look.
Leadership Annual Giving	Refers to gifts \$1,000-\$24,999.
Life Estate	An interest in property for life. For example, a person who has the right to occupy a residence for the duration of his or her life has a life estate in the property.
Life Expectancy	An actuarial measure of the average length of an individual's life.
Life Income Gift	A planned gift that makes payments to the donor and/or other beneficiaries for life or a term of years, then distributes the remainder to the University of Illinois Foundation.
Life Insurance Gifts	The irrevocable assignment of a life insurance policy for charitable disposition.
Life Time Giving	Total giving a constituent has made to the University of Illinois.

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Life-Income Trusts	There are three types at the UIF. They are: (a) the charitable remainder annuity trust; (b) the charitable remainder unitrust; and (c) the pooled income fund. The donor irrevocably transfers cash or property to the UIF under an agreement specifying that the Foundation will distribute a certain amount of the annual income from the property to a named beneficiary (ies) for life with the remainder going to the Foundation. The donor is entitled to a federal income tax deduction for the value of the remainder interest and is not subject to capital gains tax on the property conveyed under such an arrangement.
Living Trusts	Refers to a revocable arrangement established during lifetime of a donor. This method of giving allows donors to make certain provisions for themselves and their families, and thereafter. It may be used alongside a will as part of an individual's overall estate plan and may include provisions to provide gifts at death to charities. Certain estate tax benefits can be realized.
Long Lapsed Donor	Those donors who have given four to five fiscal years ago, but not since.
Lybunt	Acronym for donor who gave "Last Year but Unfortunately Not This" year.
Mail	In TED interactions, this is a postal mail piece that is sent to the constituent or household. This is NOT to be used to track mass communications.
Major Gift	Refers to gifts \$25K and above.
Market Value	Represents the value of the total endowment investment at a stated date, revalued monthly. May also be represented as an individual fund's value within the endowment pool or value of the individual shares in the endowment pool, also referred to as net asset value, or NAV.
Mass Communications	A mass communication is the same communication being sent out to twenty (20) or more constituents. These are generated using a data file or mail merge process via the official advancement database. All mass communications should be processed by UIF AGMO as a marketing effort.
Mass Solicitation	A solicitation is defined as a mass communication generated for the primary purposes of asking University of Illinois constituents to make a financial gift to the university.
Matching Credit	Revenue from matching gifts received.
Matching Gifts	Refers to contributions from corporations that match contributions made by their employees and/or board members.
Mega Gift	Refers to extremely large gifts, typically given within a campaign. There is not a specific dollar. Mega gifts would also be considered Principal gifts.
Memorial	Gift made to perpetuate the memory of an individual. Term should not be confused with gift to honor a living person.

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Monarch Stationery	Executive or personal size stationery that measures 7 1/4 X 10 1/2 inches. Standard 8 1/2 X 11 stationery using # 10 Carrier Envelopes is referred to as "Commercial" size.
Named Endowment	An endowment fund that normally carries the name of the contributor and/or the purpose.
Named Professorship	Allows the University to recruit researchers and teachers from around the world who show great promise and to encourage them to expand their careers or retain faculty. The income from an endowed professorship may be used to augment the salary of the professor, as well as to support his or her scholarly and research needs. Minimum Gift: \$500,000.
New Business	A definition of revenue that includes new outright gifts, documented pledges, grant awards, irrevocable deferred, and documented revocable deferred commitments, plus telemarketing pledge payments, WUIS pledge payments, Orange Krush pledge payments, matching gift payments, estate distributions where a revocable commitment was not previously documented, and UIAA membership payments. Excludes contracts, documented pledge payments, grant payments, life insurance premium payments, and estate distributions where the revocable commitment was previously documented. Also excludes telemarketing pledges, WUIS pledges, Orange Krush pledges, matching gift claims, and UIAA membership installment plans. New business is reported on a fiscal-year basis. See also Revenue Counting and Reporting.
Non-Donor	Alumni who have not given to a particular unit or the university or system during the past five fiscal years.
Non-Monetary Gift	See Gift-In-Kind.
Nonprofit Bulk Rate Postage	A special reduced postage rate attached to non-preferential mail and accorded to qualifying nonprofit, tax-exempt organizations for mailing at lower than first class rates.
Opt-Out	An individual is considered to have opted out of a communication, recognition, or a directory when he or she has notified advancement staff verbally, in writing (email or print), or via an established opt-out process that he or she no longer wishes to receive a particular type of mass communication (by method or for a particular objective), be recognized for his or her gift(s) or volunteer work, or be listed in particular directories published by the advancement community. Also known as Solicit Codes or Unsubscribes.
Opportunity	A systematic way of capturing information in TED on what was expected, what actually happened, and what the constituent fully agreed to in regards to the gift. Information gathered through the Opportunity feeds into overall pipeline reporting.

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TERM	DEFINITION
Output File	The completed list of contact information that is ready to send to the unit or vendor for a mass communications.
Outputs	Output files can be divided into multiple outputs, usually grouped by source code for mass communications.
Package	The total direct mail appeal; all components of the mailing and generally including a carrier envelope, letter, response device, and return envelope.
Permanent Endowment	The donor stipulates that the principal is to be kept intact in perpetuity and only the income can be expended either for general purposes or for a restricted purpose.
Personal Communications	A personal communication is any one-on-one contact (i.e., face-to face personal visits, individual phone calls, personal emails) with University of Illinois constituents that is not generated using a data file or mail merge process via the official advancement database. Personal one-on-one contacts with constituents are not considered mass communications. This definition exists to differentiate mass communications and opt-out / solicit code requests from other, more personal interactions between prospects and advancement staff.
Personal Property (or Personal Effects)	Securities, artwork, business interests, and items of tangible property (as opposed to “real property” – a term used in planned giving to refer to land and the structures built on it).
Personal Visit	A personal face-to-face meeting that occurs with the constituent or household members.
Plan	A record in TED of tasks and interactions aimed towards a defined objective for a specific constituent, such as the fundraising of a specific gift, strategic engagement with a person or organization, or stewardship of a donor. Work for separate objectives should be tracked on separate plans. Plans have a time-limited nature; once the plan’s objective is completed or abandoned, the plans should be made historical.
Plan Participant(s)	Anyone who is not Advancement Staff involved with this plan. This always includes the prospect’s individual constituent record and may include the spouse, legal counsel involved in the gift agreement or other influencers. Plan participants must have a constituent record in TED. Plan participants may also be a corresponding family foundation or company constituent record. (Doesn’t have to be an individual constituent record). To ensure the plan is visible on the individual constituent’s record he/she must be selected as a plan participant. All plan participants must have a role when entered on the plan.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
Plan Step	Any action that moves the relationship forward, or is part of the fundraiser's strategy should be captured on the plan using the Plan Step category. Plan Steps are added to the constituent's household record via the associated plan. Plan Steps surface on both the Documentation and Interactions tab, under the Interactions sub-tab and on the fundraiser's Fundraiser page.
Planned Giving	A method of supporting non-profits that enables generous individuals to make larger gifts than they could make via income. While some planned gift options provide a life-long income to a donor, others use estate and tax-planning techniques to provide for the University of Illinois Foundation and other heirs in ways that maximize the gift and/or minimize its impact on the donor's estate. Planned gifts often include outright gifts during a person's lifetime of complex assets from their base.
Pledge	A promise to pay or provide a specified charitable commitment within a specified period of time.
Population Detail	A document that holds the detailed information about the composition of populations for a mass communication.
Populations (Pops)	Encompass all the groups of constituents in a unit's preplanned mass communication efforts (solicitations and non-solicitations). Prepared before the fiscal year begins.
Portfolio	The collection of active plans in TED for which a given advancement staff member is either a Primary Plan Manager or Secondary Solicitor. Once a plan is made historical, it is no longer considered to be in a portfolio. The plans in a fundraisers' portfolio can be found in the Prospect and Plans subtab under the Fundraiser tab in TED.
Posting	Recording gifts by date received, mail or effort code, and amount.
Power of Attorney	The legal document which grants authority for one person (not necessarily an attorney-at-law) to act as another's agent or attorney-in-fact. Powers may apply to financial matters or healthcare.
Power Structure	Individuals of wealth, power and status linked informally within a community or market area who can stimulate action; as part of the leadership of a fundraising program, representatives of the power structure can help assure success. Their presence or approval is most valuable for successful conduct of fundraising campaigns.
Power Users	People from each department who are "experts" about the computer programs used in their departments or who are willing to become experts. The Power User group will meet regularly ... to discuss computer and training issues.
Present Value	The value on a given date of a future payment or a series of future payments, discounted to reflect the time value of money based on various factors such as investment risk and inflation.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
President's Advancement Council (PAC)	The charge of the PAC group is to discuss topical matters related to advancement, share information across the advancement program, plan for the future, and ultimately take any necessary decisions as it relates to the advancement program at the University of Illinois.
Presidents Council (PC)	This gift club is the highest donor recognition group for the University of Illinois. The members of the Council are the leading alumni and friends who support the University. There are specific gift level requisites that must be met for membership.
Presort First Class	(Minimum 500 pieces) Mail is postal code sorted which allows for postal discounts. Delivery of mail is typically within one to five days and varies due to post office volumes.
Presort Non-Profit/Presort Standard	(Minimum 200 pieces) Mail is postal code sorted which allows for postal discounts and utilizes non-profit rates which reduces costs for approved charitable organizations. Delivery of mail is typically within one to fourteen days and varies due to post office volumes.
Primary Affiliation	The unit(s) with which a constituent has displayed the most interest, as defined by giving, degree, engagement, etc.
Primary Plan Manager	Also known as the Primary Manager (on a plan). The Plan manager is any advancement fundraiser responsible for all aspects of the plan. A Primary Plan Manager is required for each plan type within TED.
Principal Gifts	Refers to gifts of \$5 million or more.
Private Gift Guidelines	This document is intended for Foundation and constituent unit personnel to use in understanding the policies and programs of fundraising at the University of Illinois.
Private Support	Public and State appropriations provide the University's basic operating budget, which constitutes less than one-third of the total funding. Private support from concerned patrons and constituents provides opportunities and flexibility necessary for excellence at the University.
Probate	The court-supervised administration of an estate, including the review or testing of a will to ensure that the will is authentic and the estate is distributed properly.
Proposal	A written plan and request for private financial support.
Prospect	Potential gift source, a prospective contributor.
Prospect Manager	Responsible for the coordination of multiple strategies/plans on a prospect. A prospect manager is required only when either of the following are true: 1. The prospect meets the criteria for the Principal Gifts Program. The prospect managers for Principal Gift Prospects are limited to Associated Vice Chancellor or Foundation Vice President roles and above, or other designated jointly by the Vice Chancellor and UIF Senior Vice President for Principal Gifts and are assigned by the Foundation Principal Gifts staff. 2. A prospect has plans managed by more than one Advancement officer.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
Prospect Research	The process of providing accurate and detailed information to fundraiser such as gift capacity, philanthropic interests, etc.
PURL (aka Personalized URL)	This is the giving page (website) that someone lands on after entering their web code listed on a mail solicitation, or that they link to from an email. When they arrive on that giving page, it is pre-populated with a portion of their contact information, as well as specified gift funds and ask amounts that relate to the appeal and/or their past giving.
Qualification	During the Qualification stage, a gift officer creates a strategy for determining the constituent's interest and capacity in donating. Qualification strategies can be as simple as a single step or as complex as multiple steps with an opportunity, depending on the needs of the gift officer and the constituent. Qualification plans are used to determine whether a constituent is inclined to have a relationship with the university and if so, in what capacity: Engagement (volunteer), annual giving, major gift, principal gift? Qualification plans are also used to determine that a constituent is not a prospect for a number of reasons. Opportunities may be used with a qualification plan as a determining factor in the qualification. For example, a gift officer may ask for a gift of \$2500 to help determine whether or not the prospect has the capacity to give a larger gift.
Quasi-Endowment	The Board of Directors, as distinguished from the donor, sets aside current funds to be used as endowment. The Foundation Board has authorized Foundation management to set up quasi-endowments at the request of constituent units. This allows the unit to invest idle funds of \$25,000 or more for a minimum period of 3-5 years.
Rating	An evaluation or "guess-estimate" of a prospective contributor's ability to contribute. The "rating" becomes an "asking figure" for the solicitor to suggest in requesting a contribution or a pledge. It should not be based on guess of "willingness" to give.
Reach backs or Advance Gifts	Strategically important gifts solicited in advance of the formal public beginning of an intensive campaign to insure a level of giving equal to the requirements of the campaign dollar objective.
Reaching Stellar Campaign	Each university in the University of Illinois System has a unique and individual campaign that officially launched in October 2017, and continues thru June 2022. The Springfield (UIS) campaign goal is \$40M for <i>Reaching Stellar</i> .
Real Estate Gifts	Gift of real property, e.g. land or buildings.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
Recognition	Recognition is defined as any public acknowledgement of a University of Illinois constituent's gift or voluntarism. Examples of recognition are printed or online donor or volunteer honor rolls, large-scale listings of donors or volunteers on walls, buildings, pavers, or publicized videos or speeches mentioning constituents' time or financial commitments to the University.
Regional Directors (RD's)	Major gift officers who are responsible for personally visiting with alumni, reconnecting them with the University and assisting their plans to support the University of Illinois.
Related-Use Rule	If the use of a donated item of tangible personal property is related to the exempt purposes of a non-profit, the donor is entitled to an income-tax charitable deduction for the full fair market value of the property, provided its sale would result in long-term capital gain. The deduction is subject to the 30 percent deduction ceiling and five-year carryover. If the tangible personal property is unrelated to the exempt purposes of a non-profit, the donor is entitled to an income tax charitable deduction limited to the donor's basis in the item donated.
Remainder Interest	In a trust, the portion of the principal left after the income interest has been paid to the beneficiary (ies). A charitable remainder trust pays income to the benefactor or other individuals and then passes its remainder to charity.
Remainderman (Other)	Called "Other Remainderman", the person or organization besides the Foundation who receives assets after the donor and other designated beneficiaries are deceased or following a prescribed time.
Remainderman	The individual or organization who receives the trust principal after the income interest has been satisfied.
Renewal Mailing	A mailing to existing donors and members requesting renewed support, generally on an annual basis.
Residuary Estate	What remains after all other bequests have been distributed or paid, and debts and expenses have been paid.
Response Device	A form bearing the name and address of the prospective donor, the mail key or source code, and copy by which the recipient can indicate the size of gift, its designated use, and request additional information.
Responsible Person	The University or Foundation administrator who receives monthly statements and initiates transactions for a fund. This person may also be responsible to regularly communicate with the donor regarding the fund's activity and expenditure.
Restricted	Gift, grant or pledge of money limited by the donor for a specific purpose with moral and legal restraints precluding use for any other purpose.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
Retained Life Estate	A planned gift option that allows a donor to remain living in or using one home, vacation home, or farm while establishing a gift of that property to UIF for the purpose chosen by the donor. The donor receives an income tax deduction in the year the gift is made, and UIF receives the property at the end of the retained life estate's term (usually the donor's lifetime).
Scholarship	Financial award to a student to help pay for educational expenses.
Securities	Used broadly to mean stocks, bonds, and promissory notes.
Seeds	Members of advancement or leadership who have requested a copy of the mass communication for their records.
Segments	Made up of queries/selections. Segments are groups of constituents that share a quality or should receive the same version of a message. Multiple segments can be attached to one marketing effort for stacking purposes in mass communications.
Sequential Solicitation	Adaption of Benjamin Franklin's philosophy of sequential solicitation: Seek first the largest gift, use this gift's stimulus to induce the second largest. Complete solicitation in each sequence before starting to solicit in the next lower sequence.
Social Media	A contact with the constituent or household members made through a social media account such as LinkedIn.
Soft Ask	Indirect ask for donations; e.g. a "give now" button at the bottom of an e-newsletter.
Solicit Codes	An individual is considered to have opted out of a communication, recognition, or a directory when he or she has notified advancement staff verbally, in writing (email or print), or via an established opt-out process that he or she no longer wishes to receive a particular type of mass communication (by method or for a particular objective), be recognized for his or her gift(s) or volunteer work, or be listed in particular directories published by the advancement community. Also known as Opt-Outs or Unsubscribes.
Solicitation	Once a constituent is in the cultivation phase it is time to add an opportunity to the Cultivation plan. This also includes the preparation of the proposal and the presentation of it to the prospect. Solicitations are added to any Cultivation plan as well as some Qualification plans. The information added to the Opportunity is used in pipeline reports for the unit, college, university, and system. By policy, only one opportunity can be added to a plan. Any step taken between when the Ask is made and when the donor replies can be considered part of the solicitation phase.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
Source Code	A source code is a unique identifier for a specific communication (or segment of a communication), in which the objective, message, distribution date, audience, and/or method differentiates it from another communication (or segment of a communication). The source code enables users to see which constituents fell into which segments within a marketing effort (mass communications), or divide an output into multiple files. Previously known as Tracking Codes.
Special Projects	This term is reserved for specific fundraising activities, such as, construction of a facility. There is a specific purpose, a limited timetable and generally a one-time effort.
Standard Exclusions	Constituents who may meet a marketing efforts criteria, but should never be included in any mass communication, e.g., college presidents, current students, deceased etc.
State Universities Retirement System (SURS)	This is the retirement program for the University and Foundation staff who are employed full-time or work at least 50% time if part-time.
Statement of Gift	The Statement of Gift is the primary way to document gifts and pledges to existing UIF gift funds. By signing the "SOG", the donor is agreeing to their gift being used in accordance with the terms of the existing fund's governing document or guidelines.
Statement of Understanding	This agreement establishes the guideline for the operation of a gift fund established by the benefitting unit – usually when the unit is quasi-endowing current use gifts or when the unit is working with a group of donors who will jointly support a new gift fund.
Stewardship	This refers to the responsibility of the Foundation, University and constituent units to insure that gifts are used as the donor intended and to report to the contributors or their families regarding the specific use of gifts.
Suspect	Possible donor, or the stage preceding potential donor. Possible donor moves from suspect to prospect donor.
Sybunt	Acronym for donor who gave "Some Year But Unfortunately Not This" year.
Tangible Personal Property Gift	Gifts of tangible, personal property or assets such as a painting or jewelry. The charitable deduction is affected by the extent to which the property is related to the charitable organization's mission as determined by its tax-exempt status.
Task	An assignment or step that is to be completed to further the strategy. Often used to assist in tracking workflow items. Examples include "determine whether the prospect is qualified", "obtain scholarship recipient information", etc.
TED (Tracking and Engagement Database)	TED is the University of Illinois tracking and engagement database used by the Illinois advancement community to track a wide range of information related to our constituents. TED went live in November 2015

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
	and replaced the Foundation Alumni Constituent Tracking System known as FACTS.
Telemarketing	The Foundation and UIC recruits, hires, trains and monitors student telemarketing representatives to make telephone solicitations for individual constituent units throughout the year. Callers also make thank-you calls and collect RSVPs for events.
Term Endowment	Is similar to a true endowment, except that at some future time or upon the occurrence of a specified future event, the principal becomes available for unrestricted or purpose-restricted use by the entity as directed by the donor.
Testamentary	Of or pertaining to a will or testament as a document. An event occurring upon death.
Testamentary Gift	A gift of property to a person by will, effective upon the death of the donor.
Testate	Having made a legally valid will before death.
Testator	The individual making a will.
Testamentary Trust	A trust that is created in a will after someone's passing as opposed to a living or inter vivos trust, which is created by a living grantor.
Total active endowment	Represents the total market value of the combined UI and UIF endowments currently providing income to support programs of the University and Foundation. The active endowment consists of the endowment pool, separately invested endowments, endowment farms and other miscellaneous assets.
Tripod Of Development	Refers to amounts that have been contributed with donor-specified restrictions that the principal may be invested in perpetuity; income from those investments may also be restricted by donors.
True Endowment	Refers to amounts that have been contributed with donor-specified restrictions that the principal may be invested in perpetuity; income from those investments may also be restricted by donors.
Trust	A legal entity created by a written agreement by a grantor to hold and invest property for the benefit of the grantor and/or other beneficiaries.
Trustee	An individual or organization carrying out the wishes of the person who established the trust (the "grantor"), paying income to the beneficiaries and preserving the principal for ultimate distribution.
University endowment	Gifts typically established by a bequest, trust or estate distribution to the University of Illinois. These assets must be accepted by the University and endowed and accounted for separate from the Foundation endowment.
University of Illinois Foundation (UIF)	The Foundation is an independent, non-profit, membership corporation. It is the official fundraising and gift receiving arm of the University.

# ADVANCEMENT GLOSSARY OF TERMS

TERM	DEFINITION
University Social Media Account Interaction	An instance where a constituent or household member responds to a social media contact from an official University social media account. These entries are to be entered only by approved social media managers.
University Survey Interaction	A response to a survey by a constituent or household member. These entries are to be entered only by approved survey managers.
University Website Interaction	A response or action taken by a constituent or household member through a unit or campus website. These entries are to be entered only by approved engagement managers.
University-Related Organization (URO)	Used interchangeably with Affiliated Organization and Allied Agency.
Unrestricted Gift	Funds from these gifts can be used at the discretion of the University campus, college or other unit for any purpose that it deems appropriate.
Unsubscribes	An individual is considered to have opted out of a communication, recognition, or a directory when he or she has notified advancement staff verbally, in writing (email or print), or via an established opt-out process that he or she no longer wishes to receive a particular type of mass communication (by method or for a particular objective), be recognized for his or her gift(s) or volunteer work, or be listed in particular directories published by the advancement community. Also known as Opt-Outs or Solicit Codes.
Variable Income	Payments received on a regular basis that are subject to change, not fixed.
Variable Tables/Content	Additional information that allows for the customization of verbiage constituents see on the final copy of the communication in a mass communication.
Webcode	The code a donor uses to get to their PURL (personalized URL). Webcode is also known as Finder number.
WebTools	An application used to customize and send out mass emails for solicitation and non-solicitation email efforts in mass communications.
White Mail	A gift received that did not include a coded response device or other source of codes applied by the fundraiser in advance, thus making it impossible or difficult to know which promotional piece prompted the response.
Will	A document by which a donor regulates the rights of others over his or her property or family after death.
With Illinois Campaign	Each university in the University of Illinois System has a unique and individual campaign that officially launched in October 2017, and continues thru June 2022. The Urbana-Champaign (UIUC) campaign goal is \$3.1 billion for <i>With Illinois</i> .
Work Orders (WO)	Typically an unplanned non-solicitation mass communication requested on an ad hoc basis through Footprints/the mass communication request form throughout the year.