

Glossary of Development Terms

Office of the Associate Vice Chancellor

#	Term	Definition
1	(A)CFRE	the (Advanced) Certified Fund Raising Executive (CFRE) credential demonstrates an individual's mastery of the standards set for core knowledge and skills required of fundraising executives after five years of professional experience
2	Acknowledgement letter	gift-acknowledgement letter; thanking donor for their generosity; often composed in conjunction with Donor Relations and Stewardship/Gift Processing
3	Advisory board	a group of usually influential and knowledgeable people that offers counsel and prestige to the institution or cause with which it is associated but that usually does not have any fiscal or policy authority
4	Annual gifts	at UC San Diego, this is a gift of \$1 to \$10K; a donation given annually, usually without any restriction
5	Annual giving	an amount given annually; a fundraising program that generates gift support on an annual basis
6	Case (statement)	the reasons why an institution both needs and merits philanthropic support; usually outlines the institution's, current needs and vision for the future
7	Contact report	the report made to the prospect management office when a move is made or contact results in new or substantive information on an existing or potential donor
8	Cultivate	to engage and maintain the interest and involvement of (a donor, prospective donor, or volunteer) with an institution's people, programs and plans
9	Deferred gifts	a gift (such as a bequest, life insurance policy, charitable remainder trust, gift annuity, or pooled-income fund) that is committed to a charitable institution but is not available for use until some future time, usually the death of the donor; also, gift expectancy (compare PLANNED GIFT)

10	Donor	person, organization, corporation, or foundation that makes a gift
11	Donor relations and stewardship	<p>the meaningful management of a relationship with a prospect/donor, which is tailored to the individual's needs, reflects the impact of their involvement with the institution, demonstrates appreciation for their generosity, and makes evident the impact of their gifts on our campus through story-telling, financial reporting, and personal interaction</p> <p><i>donor relations: the meaningful management of the relationship</i></p> <p><i>stewardship: the careful management of and reporting regarding the gift</i></p>
12	Endowment	a permanently restricted net asset, the principal of which is protected and the income from which may be spent and is controlled by either the donor's restrictions or the institution's governing board
13	Fellowships	<p>a fellowship is an award made to a graduate student to support his or her efforts in gaining a graduate degree</p> <p>use of fellowship funds will range from tuition reimbursement to a recruitment package meant to help defray other costs accrued while pursuing the degree</p>
14	Fiduciary board	persons, such as trustees or executors, responsible for the affairs or estate of another person (such as a beneficiary or donor) or institution; persons, such as a company directors or agents of a principal, who stand in a special relation of trust, confidence, or responsibility to another or others; of or pertaining to persons who hold something in trust for another
15	Foundation	a nonprofit organization, usually established for the purpose of making financial/philanthropic grants to qualifying persons or institutions
16	Grant	a financial donation given to support a person, institution, project, or program; most grants are awarded to not-for-profit institutions
17	Graduate student	masters and doctoral students, studying in either academic or professional programs

18	Identify	to ascertain, through investigation, research, and analysis those candidates who appear to be the most promising as prospective leaders, volunteers or donors
19	In-kind contributions/gifts	in goods or services, not in money, such as a contribution of equipment, supplies, space, or staff time; the donor may place monetary value on such a contribution for tax purposes
20	Leadership gift	at UC San Diego, this is a gift of \$10M+ a gift, donated at the beginning of a campaign, that is expected to set a standard for future giving
21	Major Gifts	at UC San Diego, this is a gift of \$25K to \$999,999K a significant donation to a not-for-profit organization (the amount required to qualify as a major gift being determined by the organization)
22	Naming opportunity	a recognition opportunity to celebrate a donor's gift through the naming of a capital or programmatic project; namings can be done to memorialize a donor who has passed or in honor of a donor and/or donors family members, close friends, favorite faculty member, etc. to name a gift after the giver or a designated body
23	Planned gifts	a gift arranged by gift planning (compare DEFERRED GIFT)
24	Postdoctoral scholar	a postdoctoral scholar ("postdoc") is an individual holding a doctoral degree who is engaged in a temporary period of mentored research and/or scholarly training for the purpose of acquiring the professional skills needed to pursue a career path of his or her choosing a postdoc is not a current student and therefore is not eligible to receive a fellowship or scholarship at UC San Diego
25	Principal gifts	at UC San Diego this is a gift of \$1M to \$9,999,999M
26	Proposal	a written request for a (major) gift
27	Prospect	an individual who either had the affinity or financial capability of making a gift to the institution
28	Prospect Manager	a person in charge of leading strategy on a team

29	Qualify (qualifier)	to confirm (the capacity of a prospect) to contribute
30	ROI	return on investment
31	Solicit	to ask (a person or group) for a contribution of money, resources, a service, or opinion; to request or try to acquire (such a contribution)
32	Special gift	at UC San Diego, this is a gift of \$10,001K to \$24,999K
33	Team member	a person contributing to strategy, stewardship, donor relations, etc. on a team
34	Volunteer	any person who works without compensation on behalf of the institution on a temporary or continuing basis
35	Wealth indicator(s)	points which suggest a capacity to give