WRITING MEANINGFUL CONTACT REPORTS: A HANDBOOK FOR FUNDRAISERS

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ACADEMIC IMPRESSIONS

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With nearly 20 years of institutional advancement and higher education administrative leadership experience, Jason joined the comprehensive advancement consulting firm of Gonser Gerber in 2008 and became a partner in 2012. He provides counsel in the areas of campaigns, major, planned, and annual giving, strategic planning, board development, and integrated marketing. Prior to joining the firm, Jason served as vice president for advancement and community relations at Maryville College (TN), and as director of advancement at East Georgia College.

Jason has completed Harvard University's Higher Education Management Development Program and earned the Ph.D. degree in higher education administration from The University of Tennessee, Knoxville. His research on higher education presidential derailment was used as the content for the recent book, "Presidencies Derailed," edited by Stephen J. Trachtenberg, Gerald B. Kauvar, and E. Grady Bogue.

SECTION 1: MAKING THE CASE FOR CONTACT REPORTS

The professional work that occurs with donors is not so different from the efforts we expend to make the relationships in our personal lives strong. A common theme among all of the important human relationships each of us enjoys is that we interact with people in personalized ways. We engage with each individual differently based on a whole host of psychological, sociological, and relationship-based cues. For instance, we engage with our parents in different ways than we do with our spouses, partners, and children. We may engage co-workers differently than our friends outside of work. And, of course, we engage with our donors differently, depending on their interests, values, degree of involvement, influence, and affluence.

Effective advancement leaders and gift officers will agree that our work is “relationship-based.” The best advancement professionals understand that working with donors necessitates a sensitive, highly nuanced, and personalized approach. We learn what our donors like, what they value, and what interests they have. Then we respond to them accordingly. We celebrate with them when good things happen in their lives. We mourn with them when tragedy strikes. While there is an important professional role played by advancement officers, the process of making and strengthening connections and relationships with donors occurs in much the same way as it does with friends, family members, and co-workers.

There is, however, one significant difference between how we conduct and process our personal relationships and how we conduct and process our relationships with donors. Typically, we do not keep written accounts of our interactions with our friends and family members. Most of us do not rush home after a family visit to upload into a database a report on how the visit went. We do not, on a regular basis, catalogue the vast majority of our important human relationships. There are exceptions, however. For instance, our friends in human resources may suggest we write down the important elements of our interactions with co-workers if problems are evident. And, we are used to this data-gathering phenomenon as an important part of the very personal relationships we have with our healthcare providers. But, by and large, donors represent one of the few types of relationships that require us to consistently capture information about the relationship itself. In fact, to be the most effective advancement officer, you must regularly and consistently capture the important aspects of a donor's story and their relationship with your institution.

While it may seem that implementing an administrative process for donor contact reporting is bureaucratic and impersonal, the practice actually supports your ability to create lasting and personal relationships with donors. Much like your doctor taking notes during your exam, a contact report system provides advancement officers with the needed history and context to creatively engage donors and to manage a large number of important relationships simultaneously. Contact reports serve as a sort of donor CliffsNotes for the skilled advancement professional enabling smooth and meaningful donor relationships to be built and strengthened over time. In short, the administrative process of contact reporting will aid you tremendously in building strong relationships with your donors.

Contact Reports: A Definition

This book is about contact reports. This seems straightforward until you talk to people about their definition of a contact report. Then things get a bit murky. Some people define a contact report as a report that gets completed after every visit with a donor or prospect. Others might define a contact report as a report that gets completed after any meaningful contact with a donor or prospect. And while such definitions seem clear enough at the outset, when you pause to ask such questions similar to the ones below, you quickly realize that defining a contact report is not a simple, straightforward task. For instance, how might you and your colleagues answer the following questions:

- How do we define a 'visit'?
- What does the phrase 'meaningful contact' mean?
- What constitutes a 'report'?

ACTIVITY

If you are aiming to establish or re-establish a contact reporting system, it will be helpful to gain definitional agreement on key terms. To start this process during a team meeting, ask the following questions to get a better sense of how individuals are thinking about their work:

- How should we define a "visit"?
- How should we define a "move"?
- When should a face-to-face visit <u>not</u> warrant the writing of a contact report?
- Are there non-visit situations from which contact reports should still be produced?

Because the above questions (and those in the Activity above) suggest that defining the concept of a contact report can be slippery, we should take great care to craft a helpful definition. No one definition of a contact report will work for every institution. However, the definition below is meant to be a starting point for your good thinking about what constitutes a contact report within your program. For the purposes of our discussion, a contact report will be defined as:

> *"A brief written record of a visit or other meaningful interaction with a constituent that substantially enhances understanding of the constituent's relationship with the institution."*

As we move through this book, we will return to this definition and unpack its meanings a bit more. But, for now, we'll use it as the definitional starting place for our discussion about this important component of our work as advancement professionals.

4 Reasons Contact Reports Don't Get Completed

Before we turn our attention to making the case for contact reports, let's identify the reasons most often given for why contact reports are not completed regularly. After years of providing leadership to advancement teams and serving as a consultant, I would suggest that there are four fundamental reasons as to why completing contact reports is not part of the regular work of many advancement shops.

Reason #1: "There isn't enough time"

The most oft-cited reason that advancement officers provide as to why completing contact reports happens infrequently is that there simply isn't enough time in the day to prepare them. Indeed, finding the time can be difficult with the busy schedules of most good advancement professionals.

We all have many professional demands placed on our time. In addition, we have so much information and stimuli being thrown at us each and every day that it becomes easy to believe that there is little we can do to carve out time for important tasks such as preparing contact reports. However, when we honestly reflect on how we use our time, we discover that we have more control over our time than we, at first, might admit.

SECTION 4: APPROACHES TO PREPARING CONTACT REPORTS

Now that the importance of contact reports is understood and we have a better sense of how to collect the most important data and information in a clear, concise, and compelling way, the task of writing and submitting the contact report becomes paramount. What are some of the best approaches around doing the work of contact report preparation in an efficient manner? It is to this important conversation that we now turn.

The Most Important Question: Who Is Preparing the Contact Report?

The first question to ask when thinking about preparing contact reports is *who* is responsible for writing them? There are really only two answers to this important question. Either the gift officer who had the contact prepares the contact report, or someone else prepares it. Let's look at the pros and cons for each answer.

Gift Officer Prepares The Contact Report

Pros

- Increased opportunity for clarity around important prospect discussions and issues because the person preparing the report is the person who had the interaction with the prospect.
- Quicker process of submitting the contact report because only one person is involved.

Cons

- Having gift officers write contact reports means that they may be spending less time engaging with prospects.
- Some gift officers are not effective writers and have difficulty capturing what happened into actionable contact reports.

Someone Else in the Office Prepares the Contact Report

Pros

- The gift officer can quickly jot down meeting notes or important contact information and send to the preparer. This allows the gift officer to focus more quickly on the next prospect.
- If one person in the office supports a number of gift officers, the contact reports can take a similar format as one person is preparing all of the documents.

Cons

- Critical information and data can get lost in the translation between the gift officer and the preparer of the contact report.
- The submission time for the contact report can be extended because information needs to be exchanged.

Having done this work for two decades now, my counsel is that all gift officers should get into the habit of writing their own contact reports.

I encourage teams to use a formatted template to ensure that contact reports can be completed quickly, consistently, and with minimal effort. Having gift officers write their own contact reports is more efficient overall and results in more accurate data and information being submitted into the donor's record.

A caveat to this recommendation comes when a vice president or president may be asked to prepare contact reports. For many vice presidents and presidents who have significant non-advancement responsibilities in their portfolios, writing contact reports may not be a good use of their time. In these instances, agreeing on a process by which an administrative assistant, prospect researcher, or database manager, takes contact notes from them and writes the contact report will make more sense.

How to Prepare the Contact Report

Once the decision on who prepares the contact report is settled, the next question is how the data and information gleaned during a contact with a prospect is actually recorded into the report. Today, there are myriad methods to capture data and information, and all of them represent viable ways to work. For most gift officers, the question is not, "which works best?" Instead, the question is, "which works best for me?" One can divide the types of data and information collection into 2 types:

1. Writing technologies

The writing technologies include, of course, the old-fashioned, but very flexible and reliable, pen and paper as well as keyboarding your contact reports via a computer. You may still find that leaving a prospect visit and immediately capturing your thoughts about the important parts of the discussion and "Next Steps" via a pen and a pad of paper to be the easiest and most reliable. Or, you may carry a laptop or iPad/tablet

Far from a "get to it when I have time" task, meaningful contact reports are hallmarks of high-functioning, effective advancement programs.

Regularly-completed contact reports signify a level of organization, care, and understanding of the work which evidences advancement program excellence. In this one-of-a-kind handbook, Jason McNeal reviews:

- The components of an effective contact report
- Examples of good, bad, and ugly contact reports, with in-depth analysis
- A contact report template for your shop
- Tips for managers for:
    - Reviewing contact reports with gift officers
    - Ensuring contact reports are reaching the database
- Tools and worksheets for preparing contact reports
- A primer on prospect moves management

This handbook will help your shop engage more donors effectively and, thus, will raise more money tomorrow than you are raising today.

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