



The University of Colorado

Office of Advancement
Contact Report Training

July 23, 2014

Part I

What is a contact report? Why are they important?



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What is a contact report?

CASE and CU define a contact report as a written record of a significant interaction between a fundraiser and a donor or prospect.

"Contact reports are important because they:

- *Chart the evolution of the prospect/donor relationship, informing solicitation & stewardship,*
- *Contribute to a library of information about the institution's prospect pool,*
- *Ensure a continuous information source that can be invaluable if fundraisers move on and new staff join the team,*
- *Help fundraisers spot useful connections between prospects,*
- *Are an invaluable resource for prospect researchers,*
- *Assist in compiling appropriate guest lists for events,*
- *Collect & coordinate information when prospects & donors have contact with more than one person at an institution."*

--CASE Fundraising Fundamentals, Section 10.2". www.case.org. Web. 19 June 2014.

http://www.case.org/Publications_and_Products/Fundraising_Fundamentals_Section102



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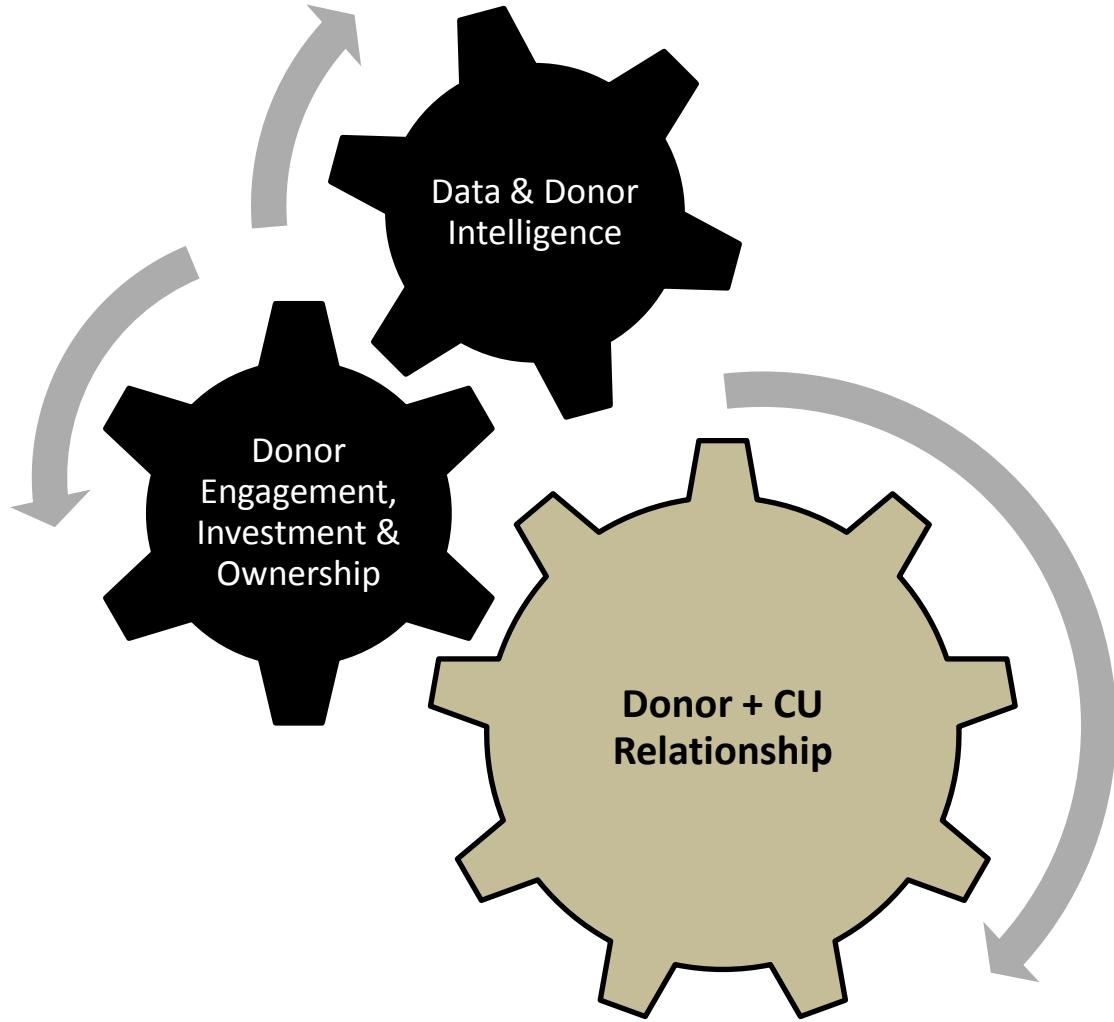
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Contact Reports = First-hand donor intelligence

Why do I need to enter a contact report?

When entered in a timely manner with a focus on capturing information that is relevant to the donor's partnership with CU, contact reports provide continuity—historical data to build on the relationship to yield meaningful outcomes for donors and CU.

Contact reports are donor intelligence directly from the source.



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What are the types of contact reports?

- Visit – Personal
- Visit – Group Setting
- Phone Call – Spoke to Donor
- Phone Call – Left Message
- 3rd Party Contact
- Email
- Postal Mail

*For additional information and definitions of contact report types, please see Contact Report Policy Definitions that was communicated in the Fall of 2013.



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What should I include in a “moves” contact report?

“Moves” versus “Other” Contact Reports

“Moves” Contact Report*

- Strategic Objective of the Interaction
- Results of Contact
- Next Steps
- Relevant information exchanged

“Other” Contact Report

- Introductory letter, email or phone call
- Voice mail messages left for the donor
- Contact that does not include relevant information about donor/CU relationship
- Personal visit that does not move a donor toward a gift

**Contact report content information is based on CASE Fundraising Fundamentals, Section 10.2.*



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What should *not* be in a contact report at CU?

- Strategy sessions and meetings *about* donors. These interactions should be recorded in the “notes” section of the entity record.
- Events. Event information should be included in the “events” portion of the donor’s record.



Part II

Contact Report Content to Drive Strategy



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Elements of a Strategic Contact Report

- States a clear purpose
- Describes interaction & pertinent details
- Includes details to drive future strategy and interaction
- Includes next step and date for next interaction



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Keys to producing strategic, high-quality contact reports

- ✓ **Know and record the purpose for your interaction/visit.**
Express the purpose and anticipated outcome clearly. For definitions of contact report purposes in Advance, please see the Contact Report Policy Definitions communicated in the Fall of 2013.
- ✓ **Record outcomes and new information.**
Record the outcome of your interaction/visit. Is it the same or different than you thought it would be? Record any new information that could advise future strategy and interactions.
- ✓ **Evaluate outcomes and record next steps.**
Record how the meeting outcome should advise next steps with this prospect.
- ✓ **Record contact reports as soon as possible.**
CASE best practices indicates contacts should be recorded as soon as possible after an interaction to ensure significant details are recorded. For CU's policy on contact report entry timing, please see the Contact Report Policy issued October 3, 2013.
- ✓ **Be objective.**



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What not to include in a strategic, high-quality contact report

- Inconsequential information
- Emotive language
- Personal opinions about the donor and value-based judgements



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Write This Don't Write That

Write This

- Purpose: Dinner with Jo and Joyce Donor to thank them for their recent pledge to the Everson Chair & keep building relationship.
- Summary:
 - Dr. Everson - update on the hepatology program.
 - I thanked Donors for recent gift, gave an overview of Personalized Medicine Initiative
 - Genetic basis of Primary Sclerosing Cholangitis
 - GI Division's research in Muccosal Information
- Outcome: The Donors were pleased with our update and would like some additional copies of CU Medicine.
- Next Steps:
 - Send additional copies of CU Medicine, contact mid-November to follow up
 - Update Business Address
- New info: Son and daughters are engineers. Holiday home in Estes Park. Golfers, skiers.

Don't Write That

Attended the Everson Chair dinner with Jo and Joyce Donor. They sat at our table, but we did not speak much.



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More Write This Don't Write That

Write This

- Purpose: Met with Jack and Judy Gives at their home to introduce myself, discuss the Steven Wiser Scholarship Fund, gauge interest in future philanthropic investments at the law school.
- Asked Judy what the fund meant to her. She is appreciative, and said it is a wonderful symbol and reminder of support from their friends, family and community for their loss. They hope to continue to meet the scholarship recipients at the reception as they have done in the past.
- Outcome: Judy and Jack plan to continue annual contributions to the fund. Discussed drafting an appeal letter about the fund's impact versus straight solicitation.
- Next Steps:
 - Draft appeal letter for review by April 16th
 - Follow up on letter and continue cultivation
 - Ask for a \$50K commitment over five years; based on giving and enthusiasm, that is within the Gives' means.
 - Enter proposal to be delivered in December.
- Additional info – Judy has a son in 8th grade, interested in law recently.

Don't Write That

- Lunch with Jack and Judy Gives and faculty partner to thank them for support of the law school.



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...And More Write This Don't Write That

Write This

- Objective: Follow up on a lead from CU Boulder volunteer that is interested in helping with fundraising activities for PACE
- Result: I met with Shaun Volunteer for lunch and he is willing to write an appeal to fellow alumni about the importance of the endowment. He'd like to version a single letter that goes to past donors and alums who are now PhD's.
- Next Steps: Look at timing and send Shaun examples of what we've done in the past.

Don't Write That

- Met with Shaun. He was expensively dressed and drove a Lamborghini, so he must be very rich. We discussed cars, my uncle had a Lamborghini. With his interest in helping fundraise for PACE program, he might become a donor.



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...And the last of More Write This Don't Write That*

Write This

- Mr. Smith is disappointed in the Athletics leadership recently. He strongly expressed his disinterest and requested no further contact.

Don't Write That

- Mr. Smith was rude and mean-spirited. He did not even offer me a drink. I doubt he will support us and is probably not worth bothering with in the future.

*These two samples from CASE Fundraising Fundamentals, Section 10.2". www.case.org. Web. 19 June 2014.
http://www.case.org/Publications_and_Products/Fundraising_Fundamentals_Section102.



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Making recording high-quality contact reports a habit

- Develop the discipline of recording contacts as soon as possible after they are made
- Make recording contact reports a part of your follow-up process
- Use a tape recorder, or other tools you find useful to help you record significant data until it can be entered into a contact report
- Create a template for contact reports to help organize information, use past formats that have worked well for you
- When possible, enter contact reports directly into Advance to eliminate extra steps



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Discussion & Questions

- What are your tips for making recording contact reports a habit?
- What method and content have you found most valuable to ensure value for strategy?



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Handouts Included with this Presentation

- How to Create a Contact Report
- Contact Report Policy
- Contact Report Policy Definitions