APRA-NW Listserv Roundtable
November 3 - 10 2014

Best-practices for training development officers

I can't overstate the value of creating a forma**l opportunity for your DO to ask questions and give feedback to your team, in person.**

At the UO, we just had an hour-long Prospect Management & Analytics (PMA) overview with two Development Officers and an Assistant from one of our schools. Four people from PMA attended (our Director, Associate director, and the research and prospect management Analysts assigned to that school).

The goal of the overview is to acquaint the school's development team with their support team in central development; explain what we can do to help them find and manage major gift prospects; and identify strategic partnership opportunities (including special projects and proactive portfolio analysis). We shared printouts of the agenda, our team organization chart, the PMA Mission Statement, and examples of how we can help at key stages of the Prospect Development Pipeline.

Informally, the meeting also created a space for everyone to:

- discuss how we work together,
- ask whom to approach with specific questions,
- learn about a DO's communication style and preferences,
- encourage certain behaviors to help move prospects through the pipeline.

Face-time with the entire group helped create an open-air environment. No question was too basic, and we got to discuss the particulars of some projects that helped pull all the concepts together for our DO. Even better, when we started the meeting our DO shared some very positive feedback about a recent work product, which **set the stage for the discussion of how we can keep helping him with his highest value prospects.**

Laura Johnson, University of Oregon

~~~~~~

I completely agree that in-person is the way to go. **So much about working together is being able to flex styles to meet the needs of the person you work with!** Here at the UW, I think one of the bright spots is the fact that we **meet one-on-one with each fundraiser at least once a quarter**. During those meetings, lots of questions get asked that have little or nothing to do with prospect research or relationship management or analytics, but focus on whatever it is the fundraiser is concerned about at the time. **Becoming a trusted advisor** in these situations makes it much more likely to get responses to emails and receptivity to new prospects than if there were no relationship at all. It's like getting an email from someone in APRA-NW that you've never met vs. someone in APRA-NW that you met at the last conference. You're much more likely to read and respond to someone you know.

We (in Prospect Development) have so much good analysis of information, but creating good environments where our fundraising partners are receptive to that information is just as key as having good information.

I'd love to hear how others have found ways to communicate their good work to their fundraisers—how do you get them interested in a lead? How do you get them to file contact reports?

Susan Hayes-McQueen, University of Washington
~~~~~~

Susan asked about **contact reports**. We've had a solid culture here of writing contact reports for a very long time (decades, actually), so all new contact staff members come into that when they join us. Contact staff include the major gift officers, annual giving staff who are recruiting class agents or seeking multi-year pledges, and alumni and parent relations staff (also recruiting, etc). They all have visit goals. The major gift officers have a lot of visits to make, so they can get behind the eight ball about getting contact reports done. The leadership of that team has set up a reliable system for making sure contact reports happen.

1) All contact staff share via email to one another and some others of us the list of constituents with whom they have appointments in the coming week or so.
2) A hash mark is added to the database by their staff with the date of the visit and this notation: Contact report to follow. They might have a database report that tells them which ones are missing.
3) The visit isn't countable until a contact report has been filed!
4) **There is a deadline for getting them done – I think it's within two weeks of the visit. If they don't make that date, the contact won't be counted**, I hear.
5) Our electronic profile – one derived from sections of the database – includes the executive summaries from the 2 (or 4, depending on the use of the e-profile) most recent contact reports. The executive summary is a section of the contact report that summarizes the visit and its outcomes in a few sentences. That would be missing for e-profiles where the contact report hadn't been completed. E-profiles are the way senior management is prepped for events.

So, there are a few processes that support the culture of completing contact reports – **a clear deadline, a database record that the visit occurred, and a communication tool that will look squirrelly if it has blanks**, and – most important to development officers – an outcome that is costly (visits not counted). It's great to be someplace where contact reports happen. If there is no contact report, the history of the visit (and the progress with the potential donor) is lost.

Cecilia Hogan, University of Puget Sound

We don't have a formalized time for secondary trainings. We also have a printed tri-fold Quick Start Guide that we give to DOs and their assistants at the first training, with the contact info for their assigned PMA team members on the front fold.

We do encourage questions from DOs and their assistants, and try to **foster open communication by CCing everyone DO's, assistants and any other relevant team members on our replies;** this helps everyone stay on the same page and can sometimes help clear up misunderstandings.

Laura Johnson, University of Oregon
