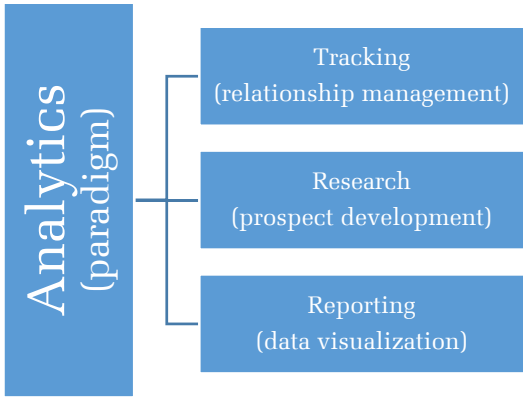
Roundtable Recap Notes

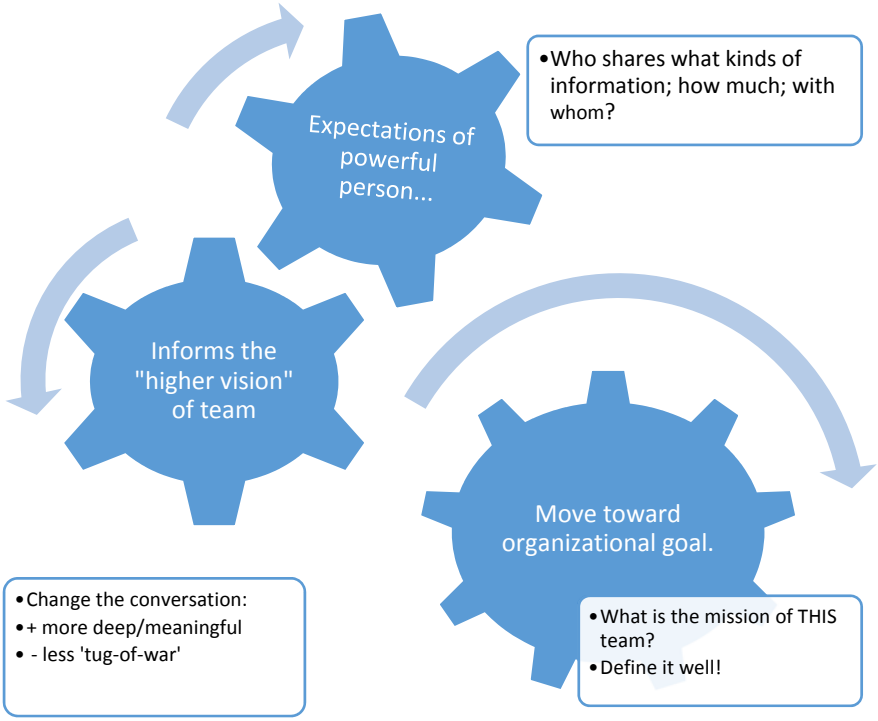
APRA-NW 2016 conference (facilitator name)

Communication across development rolls (Cecilia Hogan)

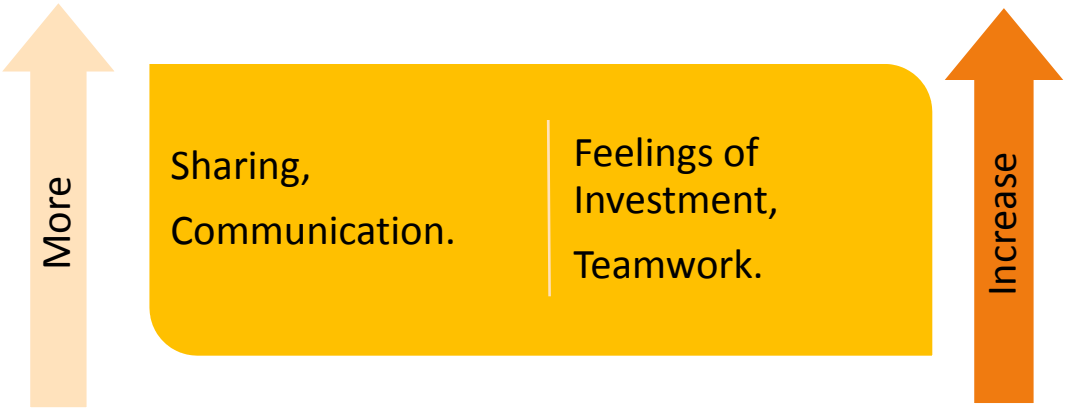
Convergence under the Analytics umbrella:



Create a culture of… [PRIORITY]:



Increase motivation to communicate by sharing stories of collaborative success at big staff meetings. This display of unity and collaboration helps inform the organizational culture. University of Oregon Advancement recently made this a part of its monthly major gifts meeting. Research Analyst, Development Officer (and others involved) all stand together to help to tell story.



Notes by Laura Johnson (johnsonl@uoregon.edu) 9/23/2016

Addressing ambiguous expectations (Michie Spradling)

- Document & clarify.
- Reply by email to outline your understanding of next steps.
- Make known your time and research limitations.
- Ask for background.
- Create a 'conversation guide' list of questions to ask during intake interview.
- Proactively manage expectations (e.g. "boot-camp" for new development officers).

Norms and habits for communication with travelling colleagues

Stress the value of your communication.

Stakeholder identification for relationship management (Jess Balsam)

"Discovery Challenge" – ranking/trophies for meaningful contact with qualified prospects.

Portfolio management 'consultation service'

- Attending a relationship management fall symposium helped group move to a more strategic mindset.
- Policy documentation: strict portfolio limit <75 people.
    - Consultation service supports this through analysis and strategic recommendations.
    - "Beefed up" RFM 'meta score' allows segmentation by prospect strength (quadrants).
    - Leads to increased productivity.
- Portfolio cleanup planning takes 4-5 months, starts in the Fall.
- Two planning meetings to get priority information and background from officer and leadership.
- Portfolio consultations take place in the Spring.
    - Analyst takes 2-3 hours to prepare for each meeting.
    - Attendees: analyst, the officer <u>and</u> their supervisor. The supervisor can help encourage change or give implicit "okay" to let go of prospects.

Portfolio review (Megan Stariha)

"Zoom lens" – analysts should be able to adjust their perspective to the portfolio dynamic of the entire team *as well as* the balance within an individual officer's portfolio.

Communication cycle:

1. Set expectation that it is happening.
2. Align discussion topics with officer metrics and interests.
3. Make goal of conversation to incite behavioral change.

No built-in constituency (Anna-Liisa Little)

- 'Check your assumptions' about who your prospects are.
- Highlight individual programs (rather than broad concepts).
- Your best new prospects are already in your database: turn transactional donors to embrace your cause!
- Add financial advisors to prospecting lists; their clientele and knowledge of donor advised funds make them very valuable connections for your nonprofit.

Prospecting among medical doctors

- Loss of admitting privileges is a bad red flag.
- State license websites have differing information. Florida has tons.
- Look for specialties and association memberships.
- Lots of information about pay trends in specialties. E.g. despite being in the lower 50%, Rheumatology is paid more this year than last year and they feel satisfied with both pay and work!
- Info source: Medscape Physician Compensation Report (annual): http://www.medscape.com/features/slideshow/compensation/2016/public/overview

Research Resources

- Ask for guidance when stuck: e.g. local public library or SEC.expert librarians.
- Share with each other about resources we use and the value we find in them.
- Utilize the APRA-NW listserv!

Crucial conversations: phrases that work

Part 1 (AM)

Before you initiate the conversation,

- Ask yourself what you really want to address. Keep this in mind so you can set your intent and focus on your desired outcome. Is the issue about a…
  - Episode?
  - Pattern?
  - Relationship?
- Take a step back to think. Determine if the time is right for a conversation. Is it urgent, or does it just feel urgent? Am I the right person to initiate this conversation and influence change?

Part 2 (PM)

- Start with a validation to help make conversation feel safe.
- STATE the facts before you tell your story.
- Everyone's story is subjective.
- Meet people where they are to communication with them (not at them).
- Tone and phrasing are vitally important.
- It's helpful to relate a status check-in to the project (not the person).

End with a question

- Can you help me understand why X happened?
- How do you see it?
- Can you tell me about….?
- Can we talk about why this is happening?
- What do you take away from this situation?
- What else do I need to know?
- Is there something keeping you from doing X?
- Are there other circumstances….?
- Is there an unresolved issue with?

Diagnose & check both sides

- What I'm hearing is…..
- If we do ___, are you willing/able to do ____?
- Can I explore some natural consequences of _____ with you?
- You may not know that ___ is affected by your actions….
- What do you think would help?

Intentions & misunderstanding

Transparency:
- Let me be clear about why…

Response:
- No, I don't always do X….. I don't Y, I do want to Z.

Contrast:
- I don't intend to __,.. I do want to ___...

I'm not criticizing your ability to ____, I'm trying to help with _____.