SAMPLE

Writing Meaningful Contact Reports

A Handbook for Fundraisers

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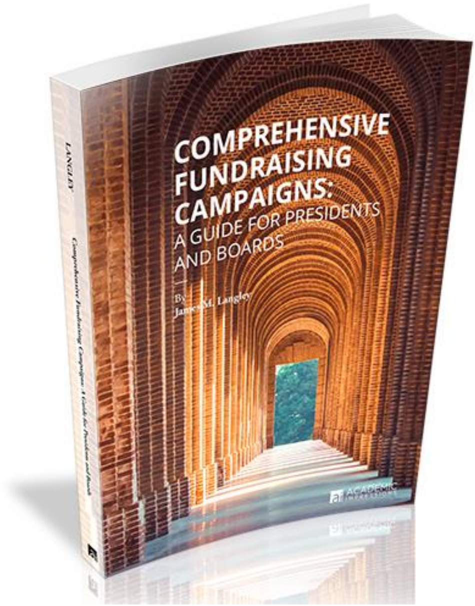

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FOREWORD

Today's advancement professionals spend considerable time engaging in donor and prospective donor research, requesting and reviewing wealth indicator reports and database analyses, and preparing specific strategies for the discovery, cultivation, solicitation, and stewardship of major donor prospects. And while research, wealth screens, and strategy crafting and implementation are important (some might suggest even critical) components of raising significant gift income, there is one aspect of the process that is overlooked too frequently—contact reporting. In fact, it is rather common for advancement programs, even those which would otherwise receive high marks for raising increasing amounts of gift income, to fail at implementing a meaningful donor and prospect contact reporting system.

Viewed far too often as an afterthought to the donor interaction or as a task that will be completed when "there is enough time," writing meaningful contact reports, when done systemically and regularly, will add tremendous value to the advancement efforts of today and tomorrow. 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.

This Academic Impressions book focuses squarely on this important yet often overlooked aspect of high quality advancement work—the contact report. The book is divided into five sections:

- **Section 1** defines contact reports and makes the case that utilizing contact reports is crucial to raising more money and strengthening a "culture of philanthropy" at your institution.

- **Section 2** highlights examples of high and low-quality contact reports.

- **Section 3** discusses the key elements or components of meaningful contact reports.

- Through the use of technology and good habits, **Section 4** addresses specific ways to make writing and recording contract reports easier.

- And finally, **Section 5** provides you with working documents to assist you in writing and utilizing contact reports more effectively.

As you read through the following pages, my hope is that you will come to view writing contact reports not as an extra, nonessential, and burdensome duty, but rather as a key component of highly- effective advancement efforts. Indeed, there is a case to be made that incorporating a culture of writing timely contact reports will help your institution raise more money over time. It is to this case that we now turn.

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'?

Because the above questions (and those in the Activity on the next page) 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.

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 not warrant the writing of a contact report?
- Are there non-visit situations from which contact reports should still be produced?

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.

I am reminded of a *Huffington Post* article that highlighted research from the multi-national management firm Accenture. It showed that 77% of individuals who watch TV also surf the web at the same time (April 8, 2013). If we pause on this interesting statistic for a moment, we see the folly in what it means for us. A decade ago, before we were all surfing the web from home, the television was an electronic escape vehicle. We watched TV to zone-out or veg-out while the images and sounds washed over us. We watched to exchange life's tiring realities for a moment or two of restful fantasy. But as technology has invaded our lives and homes, 77% of us now choose to increase the stimuli we are receiving while watching TV by simultaneously surfing the web. In other words, we make our brains work harder during a time when, traditionally, we aimed for relaxation and escape. No one is doing this to us. We are making the choice to throw more stimuli at our brains. We are making the choice to work more and harder—even while watching TV!

The point is simply this: Yes, finding the time to write contact reports consistently can be difficult. But, we might also be sabotaging our own efforts. When we are honest with ourselves, we might realize that the time to complete the most important tasks of our work has been there all along. We just need to prioritize and implement. With the techniques discussed later in this book, those 15 minutes you spent perusing your Facebook newsfeed could have been used to complete 2 contact reports!

Reason #2: "I don't believe writing contact reports is important to the advancement process"

As discussed earlier, effective higher education advancement work is a qualitative and relational enterprise. It is qualitative because humans engage one another based more on emotion and sentiment than on numbers and logic. It is relational because donors make their very best gifts to people they trust. And trust forms within relationships.

The American poet Maya Angelou is quoted as having said, “People will forget what you said or what you did, but they will never forget how you made them feel.” The very best advancement officers make donors feel good about giving. They do this by authentically caring about the interests of others, being interested in understanding the motives of others, humbly inquiring, and being skilled at aligning donor values and interests with institutional needs and goals. In short, they are qualitative and relational.

Figure 1: The Task-Relationship Continuum

As can be seen in Figure 1, the Task-Relationship Continuum suggests that individuals who are relationship-oriented can be gifted fundraisers. They view the world through qualitative and relationship- based lenses that allow them to focus intently on the messages that others send. They are socially aware. Many of these same individuals, though, struggle to complete tasks that don’t immediately enhance relationships. They can have difficulty understanding why a task such as writing contact reports is important. Relationship-oriented individuals have little need to create and check-off a "to-do" list. Such efforts represent tedious and unimportant work. The real work is in building relationships with donors, not sitting behind a desk "pushing papers."

Upon reflection, it should come as little surprise that some of the most talented gift officers dislike completing a task like writing contact reports. You probably have individuals on your team who are relationship-oriented. Perhaps you are! If you are more relational in your approach, you probably are wondering why you should pause in your important work of relationship-building to write a contact report. It is this either/or dichotomous thinking that this book hopes to dispel. Writing contact reports isn't a task that is outside of the relationship-building process. Writing contact reports is a key component of the relationship-building process.

Reason #3: "No one reads them, so why write them?"

I remember an interaction I had with a talented gift officer a few years ago. She was fabulous with donors and helped the institution raise a good amount of money. However, she failed miserably when it came to documenting her interactions with donors through the contract report writing process. The vice president asked me to visit with the gift officer and encourage her to start writing contact reports regularly.

Trying to understand her perspective, I complimented her on another good few months of donor visits that resulted in gifts. I then said, "How are you doing with writing contact reports for those interactions?" Her response was confusing to me. "I don't keep a diary," she said looking at me flatly. I asked what she meant, and she said, "No one is supposed to read your diary, correct? It's usually something that is personal and not to be shared. Well, our contact reports aren't shared, no one reads them. It's like a diary. And I have never kept a diary." To this gift officer, if no one on staff was reading about her work with donors, she didn't understand why she should put the time and effort into capturing those interactions. Contact reports were being treated like diaries. And she didn't keep a diary!

For you and your team, it may very well be that contact reports are not read by everyone. The point, though, is that contact reports serve many important purposes, not the least of which are for historical record. What the gift officer who didn't keep a diary failed to realize was that one day she would leave that institution (in fact, she had left by the time of the writing of this book), and the institution would struggle to understand some of the particulars regarding the relationships she developed with donors because there was no consistent historical record of her donor interactions.

Reason #4: "I'm not sure what to include in a contact report"

If you've read many contact reports, you find that some gift officers could be politely characterized as verbose in their writing style. Over the years, I have read contact reports that include information about the color of the dining room walls, the type of interior in the car that was driven to the restaurant, and the fact that the waitstaff at the restaurant was rude. Gift officers who capture every twist and turn of a meaningful donor contact turn these experiences into multi-page novels. These stories contain less-than-significant fluff that others have to wade through in order to get the two or three nuggets of important information about the donor interaction. On the other hand, some gift officers struggle to write complete sentences and, unfortunately, leave out essential information. Their contact reports look like a bulleted to- do list or an abbreviated account similar to a text message. For both the verbose and the more brief versions of contact reports, the gift officer is evidencing the fact that they are unsure about what should be included. Over time, if the task of writing contact reports is not made clear and understandable, the gift officer will stop preparing them. In Sections two and three of this book, you will find information about how to craft the most effective contact reports. The first step in that process is to make certain that all members of the team understand why contact reports matter and what to include in them.

Yes, Contact Reports Matter

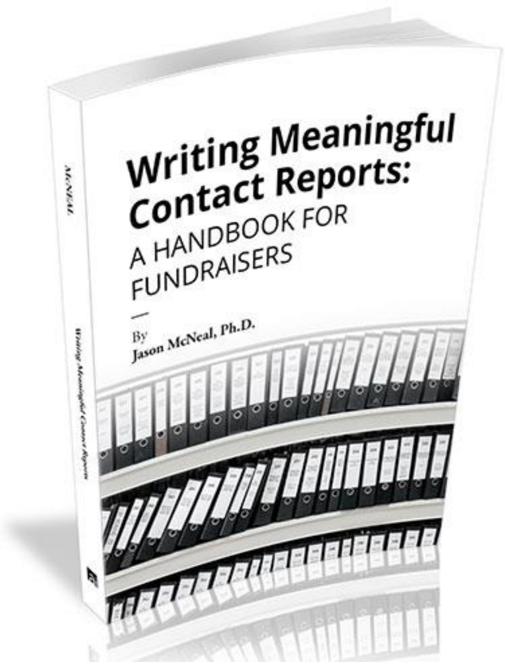
Perhaps there is someone on your team who uses one of the four fundamental excuses for not regularly preparing contact reports. Maybe they have an altogether different perspective on why they do not prepare them consistently. Perhaps that person is you. No worries. If you or someone you work with is failing at regularly producing contact reports, let me first suggest that there is hope! Completing contact reports can become a regular part of your office's work flow.

To become more consistent in crafting high-quality contact reports, we must first start by understanding and embracing why they are important, why they are important to you today and in the future, and why they are key to raising more money.

READ MORE

We hope you have enjoyed this complimentary sample from *Writing Meaningful Contact Reports*.

You can purchase the entire book here.



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