



## Admin Guide for Entering Contact Reports

This guide is for administrative assistants to assist them in asking the necessary questions of Development Officers (DOs) when entering contact reports on their behalf. It starts with background information as context so that Administrative Assistants are aware of the type of information a DO needs to know from Raiser's Edge in order to coordinate as appropriate with fellow fundraisers before and after they contact a prospect/donor. The Prospect Management Policy provides the guidelines on what coordination needs to happen before and after prospect contact.

### The Context

#### Definition of a Contact Report

Generally a contact is either:

1. A discussion with the prospect about the prospect's commitment, involvement or interest in a school/college or initiative. "Max Fundraiser saw Mary Donor at the Costco breakfast. Mary wished to discuss the impact of the economy on her endowment." This includes contacts that are significant moves along the whole cultivation cycle of a major gift.
2. A discussion with the prospect that reveals key information that should be shared with University Advancement staff. "Max Fundraiser saw Mary Donor at the Costco breakfast. Mary shared that her twins had just gotten into Georgetown University." This discussion might indicate to UA staff that Ms. Donor's funds may be tied up for a few years.

*Thus, contact reports are not intended to be the complete repository of all communications or interactions with a donor/prospect.*

Questions DOs are to ask themselves to help them determine if a contact is contact report worthy:

- Even if incidental, did the contact made with the prospect give them information that is likely to have an ultimate impact, good or bad, on a prospect solicitation?
- And, if another SU staff person had had the same conversation with the prospect would they want to know that information before their contact?

#### Role of the Development Officers in filing contact reports

- It is the responsibility of the fundraiser making or involved with the contact to file a Contact Report on the Actions Tab of the constituent's Raisers Edge record, within two weeks of the contact. **The Action's notes tab is used to label the action as a contact report with a brief description of its purpose/outcome to help other users decide if they need to read the entire contact report.**
- Additionally, **it is the responsibility of the fundraiser to ensure the contact report is shared with all other appropriate staff** (other DOs, Prospect Manager, Deans, faculty etc) as indicated in the prospect management guidelines. If a representative of SU, such as a volunteer or faculty member, makes the contact, it is the responsibility of the fundraiser to ensure that the contact report is filed. **The fundraiser includes his/her name as solicitor on this action, since the fundraiser is responsible for the follow up steps to this action.**
- The contact report should include **a next step** and next scheduled contact date (unless the prospect is being dropped from the development cycle, which should be noted in the contact



report). DOs open up a follow up action for the next step as well that will show as an Open action on the constituent's record.

### Before a DO makes a contact

Development Officers need to check RE before every contact in order to know with whom to coordinate their efforts per the Prospect Management Policy.

At a bare minimum:

- The DO needs to know if there is a Prospect Manager (PM) other than him/herself in order to keep the PM in the loop. Also key is other staff working with the prospect as reflected on the Relationship Tab, who need to be aware of the contact as well.
- The DO needs to know if there is a prospect management alert on the prospect's record---these alerts indicate that the prospect is not to be contacted or is to have limited contact at this time.
- The DO needs to know what the Prospect Tab (or the spouse's prospect tab) reveals in terms of the Classification and Top 20 status.

## Entering Contact Reports (and General Notes if called to do so)

### Does this Action qualify as a Contact report?

If YES:

- What **Type** is it, i.e. discovery, cultivation, solicitation, etc.? **Use the types marked for Contact Report use only.**
- What **Category** is it, i.e. Mailing, Email, Meeting etc.?
- What is the **date** of the contact?
- Are there other fundraisers/volunteers/faculty whose name needs to be included in the **Solicitor field** of this action?
- What short sentence should be entered on the Action's Notepad for "**Notepad Description?**" This is generally a summary of the **outcome** of the contact.

You should consider the following steps as well---for discussion with your supervisor:

- Should any of this information be recorded on another prospect's record? If so, what and who?
- Are there any **updates** for the prospect's RE record to send to [bioupdates@seattleu.edu](mailto:bioupdates@seattleu.edu)?
- Is there a **next step** to enter as an open action? If so, what is it?
- Does the contact need to be sent to any other fundraisers?

If NO:

The action is not a contact report. It should be entered as a **General Note** on the Action's note tab:

- What **Type** is it, i.e. general communication, general thank you, critical secondhand information, strategy? **Use the types marked for General Notes Use only.**
- What **Category** is it?
  - For general communication and general thank you, the Category can be the usual suspects: i.e. the type of contact, by phone, mail, meeting etc.



- For critical secondhand information and strategy, the Category is automatically **Task/Other** since the action is recording information about a prospect rather than a contact with a prospect.
- What is the **date** of the contact?
- What short sentence should be entered on the Action's **Notepad description** field?
  - **Reminder: use the General Notes notepad type since this is not a contact report.**