

## Contact Report Directions

9-7-10

Contact reports show the history and content of interaction between entities and major gift officers (MGOs) or development officers (DOs); they may be entered on entities regardless of prospect status. They are the best way to record and keep information vital to obtaining gifts and managing the relationship. Contact reports written in a fact-based, non-narrative writing style with few paragraph breaks and no duplication of information found elsewhere are more succinct, easier to read and easier to fit into reports. Descriptions should concisely summarize the interaction while providing relevant details that will be useful for future contacts.

### ENTERING A NEW CONTACT REPORT

1. Go to Options on the top menu bar, then Mode, choose Maintenance
2. From the entity profile, drill down in the Prospect Summary Window
3. Under Entity Attributes, double click on the Contact Report folder
4. Click on the New button on the left menu bar to open a blank contact report

The screenshot displays the 'Adv Contact Report - (adding...)' window in the Advance software. The interface includes a menu bar (File, Lookups, Edit, Fiscal, Options, Reports, Clipboard, Window, Help) and a toolbar with icons for various functions. The main form area is divided into several sections:

- Contacted ID:** 0000151550, Ms. Rebecca E. Askew
- Joint:**
- Name:** Ms. Rebecca E. Askew
- 2nd ID:** [Empty field]
- Sort Name:** ASKEW,REBECCA,E
- Prospect ID:** 112482
- Title/Addr.:** [Empty field]
- Proposal ID:** [Empty field]
- Program:** [Empty field]
- Detail Section:**
  - Contact Type:** [Empty field]
  - Purpose:** [Empty field]
  - Unit:** [Empty field]
  - Initiated By:** [Empty field]
  - Outcome:** [Empty field]
  - Attitude:** [Empty field]
  - Description:** [Large text area]
  - Text:** [Large text area]
  - Author:** [Dropdown menu]
  - Date:** 09/13/2010
- Rep ID:** [Empty field]
- Rep Type:** [Empty field]
- Name:** [Empty field]
- Comment:** [Large text area]

**Note:** If the entity has no prior contact reports entered, there will not be a Contact Report folder under Entity Attributes. In this case:

1. Click on "Maint" on the top menu bar
2. Choose Contact Rpts
3. Click on the New button on the left menu bar to open a blank contact report

**CONTACT REPORT FIELDS – Required fields end with :**

<b>Author:</b>	Choose the name of the person who made the contact
<b>Date:</b>	<b>Use the date the action happened</b> (When was the mail/email sent? What was the date of the meeting?)
<b>Prospect ID</b>	Select the active prospect record (if one exists)
<b>Proposal ID</b>	Select the corresponding proposal that this contact involved (if one exists)

<b>Type:</b>	<i>Correspondence</i> Letter or email
	<i>Phone</i> Telephone call
	<i>Event</i> Events are football/basketball games, board/committee meetings, receptions, luncheons Social occasions where no significant discussions or actions occur. The entity is not moved forward in the giving pipeline as a result of this encounter and no substantial new information is discovered.
	<i>Visit</i> <u>All visits are face-to-face.</u> A visit contact report should include information that informs the formulation of the next strategy steps toward the gift. Discovery (initial) visit contact reports should contain specifics on the prospect’s philanthropic giving, interest in NC State, interest in your area, capacity to give, and inclination to give. Subsequent cultivation visit contact reports should include any updates on the above items and should include the development officer sharing the case for support (along with the accompanying support information) for the university and department and/or college. The visit contact report should include the reason for the visit.

<b>Purpose:</b>	<i>Introduction</i> First contact with entity — use this code sparingly and not more than once per entity
	<i>Qualification</i> Discovery activities/communication to determine the entity’s affinity with NC State and ability to give, at what level
	<i>Cultivation</i> Activities/communications that build the relationship, determine the entity’s interests, and advance the prospect through the solicitation cycle to the ask
	<i>Ask</i> Asking for a gift with <b>one ask contact report per gift</b>
	<i>Negotiation</i> Discussing the details of a gift: amount, purpose, conditions, implementation, timeline, payment, etc – <i>relates to a specific gift ask</i> <b>may have more than one negotiation contact report per gift</b>
	<i>Stewardship</i> Ongoing contact and relationship-building after the ask has been made

<b>Description:</b>	<ul style="list-style-type: none"> <li>Should be detailed and informative “Mary and I enjoyed a wonderful steak lunch.” = NO “Over lunch expressed interest in school endowment” = YES “Asked for gift” = NO “Asked for \$25k pledge for school endowment” = YES</li> <li>For Asks, list the dollar amount or range in the description line</li> </ul>
<b>Text</b>	<ul style="list-style-type: none"> <li>Summarize other details—do not copy entire letters or emails—entire letters and emails may be attached if desired</li> <li>Avoid spacing issues: limit paragraph breaks, delete multiple blank lines</li> <li>Be sure the text is specific: general statements such as “we had a nice conversation” are not helpful</li> </ul>

<b>Joint checkbox</b>	Check this box if you need to connect the contact report to a spouse <ul style="list-style-type: none"> <li>The 2<sup>nd</sup> ID field will automatically populate if the spouse is hyperlinked in the entity record</li> </ul>
<b>2<sup>nd</sup> ID</b>	<ul style="list-style-type: none"> <li>If there is no hyperlink for the spouse, enter his/her Entity ID # in the 2<sup>nd</sup> ID field</li> <li>You can also use this field to link other non-related entity records: For example, if a Visit or Event involves more than one prospect you would want to use this field rather than entering two separate Contact Reports</li> </ul>
<b>Outcome</b>	You can use this field if you learned qualifying information on the prospect's interest level: NLMP = No Longer My Prospect NMGP = Not Major Gift Prospect Note: you will still need to complete an Assignment Removal Request if you no longer want to be assigned to the prospect

**Advance**  
 File Lookups Edit Fiscal Options Reports Clipboard Window Help

Entities Prospects Programs Proposals Contact Rpt Tasks Allocations Transactions GoTo Clipboard Help

**ADV Contact Report - (#174853) Ms. Rebecca E. Askew**

**Contact Report**

**Joint**  
**Contacted ID:** 0000151550 Ms. Rebecca E. Askew  
**Name:** Ms. Rebecca E. Askew  
**Sort Name:** ASKEW,REBECCA,E  
**Title/Addr.:**   
**Prospect ID:** 112482 Ms. Rebecca E. Askew ( )  
**Proposal ID:**   
**Program:**

**Detail Documents (0)**

**Contact Type:**  Visit  
**Purpose:**  Qualification  
**Author:** 0000198062 Ms. Pam Banks  
**Date:** 09/10/2010  
**Unit:**   
**Initiated By:**  (none)  
**Outcome:**  (none)  
**Attitude:**  (none)

**Description:** Discussed long term plans for giving; she is major gift prospect  
**Text:** Recently retired, interests include gardening and church activities. Worked at IBM in HR for 20 yrs. Interest in scholarships. Will continue supporting Dean's Circle with annual end of year gift but open to discussing endowment. Possible major gift with continued cultivation. Next Step: Tour dept and meet student benefiting from a scholarship.

**Rep ID:**  **Rep Type:**  (none)  
**Name:**   
**Comment:**

## VISIT CONTACT REPORTS

All visits are face-to-face. A visit contact report should include information that informs the formulation of the next strategy steps toward the gift. Discovery (initial) visit contact reports should contain specifics on the prospect's philanthropic giving, interest in NC State, interest in your area, capacity to give, and inclination to give. Subsequent cultivation visit contact reports should include any updates on the above items and should include the development officer sharing the case for support (along with the accompanying support information) for the university and department and/or college. The visit contact report should include the reason for the visit.

Name: Mr. Poli Sci Major  
 Contact Type: V Visit  
 Purpose: C Cultivation  
 Unit: PSC  
 Prospect ID: 7777  
 Proposal: 78910  
 Author: Mr. I'm Lucky  
 Date: 2/22/2009

Description: Lunch and Tour of Caldwell Hall with Professor Government in prep for Endowed Scholarship ask

Text: IL and G were taken to lunch by PSM--the PSM & G hit it off tremendously. PSM lit up when G told several stories about former faculty members and recent retirees who taught PSM. PSM said he attributes so much of his skill set and ability to interact with local governments in his successful business to his education in the department of Political Science. We discussed PSM's family, the PS Dept, and the college. Next we toured Caldwell Hall where we happened upon one of his professors, Dr. Retiring Soon, who is retiring this year. PSM was like a kid in a candy store. By the end of the visit, PSM agreed to participate in the college's upcoming golf tournament, acknowledged I was trying to get him involved in some things, and indicated he is interested in doing something for the department.

Next steps: 1) send letter of thanks; 2) send golf tourney invitation and follow-up; 3) conduct/review financial research; 4) schedule lunch at the club again and make soft ask of scholarship amount ranging \$100K-\$250K.

Name: Dr. X  
 Contact Type: V Visit  
 Purpose: A Ask  
 Unit: ABC  
 Prospect ID: 33333  
 Proposal: 54321  
 Author: Ms. Clever Conversation  
 Date: 1/11/2010

Description: CC, Dr. X, & Dean Y traveled to visit Mr. Z—Dr X agreed to designate \$25K of planned gift.

Text: During the trip Dean Y and I discussed our working to secure the \$150,000 total needed for the Mr. Z challenge. Dr. X inquired about the balance--\$35K. Dr. X then committed \$25K, and said that once his collection sold (this is a \$50K venture he is working with the planned giving office), he will designate \$25K for us. This commitment allowed us to report to Mr. Z that we were very close to meeting his challenge. Next step: Confirm that Dr X communicated commitment to PG office.

Name: Mr. Reluctant Alum  
 Contact Type: V Visit  
 Purpose: Q Qualification  
 Unit: DEF  
 Prospect ID: 44444  
 Proposal:  
 Author: Mr. Not Lucky  
 Date: 7/20/2010

Description: Initial discovery contact at Big Engineering Firm, Inc in Charlotte;

Text: RA is married, no children. Recently promoted to Executive VP, now serving as liaison between his firm and my dept for senior projects and recruitment. Research rated him \$100K and I learned nothing to indicate otherwise. RA was not overly forthcoming with information. As his time was limited, I shared how EBIII was progressing and thanked him for his firm hiring graduates last year. I explained the impact of the current economy on our endowments and annual operating costs and how the percentage of alumni giving back impacts our US News & World Report Rankings. I asked RA to consider \$5K annual gift but he showed little interest. I invited RA to contact me the next time he would be in Raleigh so I could set up a tour of EBIII for him. He said he would let me know. RA is a potential major gift candidate but has not had much exposure to philanthropy, does not yet seem inclined to give. Next step: Invite to tour EBIII and engage in other activities to deepen his relationship with the college/dept.

## ATTEMPTS TO SCHEDULE DISCOVERY VISITS

Attempts to schedule discovery visits are endlessly varied and, fortunately, can be mercifully short Advance contact reports!

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Name: Mazie & Jimmy Excuse  
 Contact Type: C Correspondence  
 Purpose: C Cultivation  
 Unit: XYZ  
 Prospect ID: 22222  
 Proposal:  
 Author: Ms. Try and Try Again  
 Date: 4/20/2009

Description: Unable to meet

Text: He is currently tied up supervising a home renovation project and will go on extended travel after that is completed.

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Name: Mr. No Hope  
 Contact Type: P Phone  
 Purpose: I Introduction  
 Unit: RST  
 Prospect ID: 88888  
 Proposal:  
 Author: Ms. Perseverance  
 Date: 8/3/2010

Description: Spoke with wife who refused to bring him to the phone stating she would give him a message and hung up.

Text:

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Name: Mr. Finally A. Visit  
 Contact Type: C Correspondence  
 Purpose: I Introduction  
 Unit: XYZ  
 Prospect ID: 77777  
 Proposal:  
 Author: Mr. Eternally Grateful  
 Date: 5/6/2010

Description: Emailed to introduce myself and set up possible visit during my trip to Charlotte. Visit set for 4-2-09.

Text:

## IS IT AN EVENT OR A VISIT? Depends On Contact Report Content!

<p><b>EXAMPLE #1</b></p> <p><b>Event Contact Report Text</b></p> <p>Lunch at the State Club included vision for College of ZZZ. Dr. Y, former dean of College of ZZZ, agreed to attend our upcoming legacy event for former board members.</p>	<p><b>Visit Contact Report Text</b></p> <p>Lunch at the State Club included vision for College of ZZZ. Dr. Y, former ZZZ dean, will attend our upcoming legacy event for former board members &amp; agreed to consider adding to his \$50K endowment with a three year pledge. Next step: Secure signed pledge form by March 30.</p>
<p><b>EXAMPLE #2</b></p> <p><b>Event Contact Report Text</b></p> <p>Enjoyed Clemson game and meeting Dean X.</p>	<p><b>Visit Contact Report Text</b></p> <p>Enjoyed Clemson game and meeting Dean X. Asked me to call next week to schedule meeting to discuss his underwater endowment &amp; possible \$8K gift to continue supporting the student. Wants to know investment strategy to avoid future problems. Next step: call Monday to schedule appointment.</p>

## WELL DONE CORRESPONDENCE CONTACT REPORTS

The authors of these two correspondence contact reports summarized instead of copying, included the reason for correspondence, and shared next steps.

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Name: Mr. John Leland  
 Contact Type: C Correspondence  
 Purpose: C Cultivation  
 Unit: ABC  
 Prospect ID: 666666  
 Proposal:  
 Author: Ms. Succinct Writer  
 Date: 9/1/2009

Description: Scheduled 3-10-09 Richmond visit for QQQ ask

Text: Email exchanged with JL regarding my visit with him in Richmond. Will ask JL to consider directing this year's fund to QQQ since his favorite project is fully funded; will also introduce him to the idea of considering a Will bequest or deferred gift.

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Name: Ann Hutchinson & Roger Williams  
 Contact Type: C Correspondence  
 Purpose: C Cultivation  
 Unit: ABC  
 Prospect ID: 999999  
 Proposal:  
 Author: Mr. Try Again  
 Date: 9/1/2009

Description: Sent planned giving info for including TTT endowment in estates

Text: Mailed brochures from Office of Gift Planning to AH & RW; they want to include the endowment in their estate and are interested in CGA's. Have notified Steve Watt and will coordinate visit with them when they are ready. Roger and Ann were to come down from Rhode Island for the 2/22 ball game, but did not attend due to icy weather; they will be in Raleigh in late March to visit RW's sister. AH's name has been forwarded for consideration as a new board member. Next step is to coordinate lunch/dinner with the dean.

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## TOO MANY PARAGRAPH BREAKS

### Multiple Paragraph Breaks Require too Much Space

John gave me a tour of the facility where they create 3 D body imaging devices. They receive lots of grant money from the TSA. In 08, Congress never got around to finishing the spending bills, so their grant was cut in half. John thinks they'll get the money back in 09 and he's visiting DC next week.

John travels internationally constantly 3 of 4 weekends & gave up his 45yrd line tickets because never able to go to games. Also runs another company that absorbs the rest of his time. He enjoys his work. His job entails meeting with prospective clients and current clients.

He did his PhD dissertation on the digital supply chain where a product is purchased, sold, then created.

He would be interested in making a presentation to students and faculty about his company.

They have a lot of partnerships with XYZ University.

He said that he couldn't see himself doing a scholarship at this time because of the bad financial situation. He also said that his company couldn't do a large gift because it too is a nonprofit.

### Fewer Paragraph Breaks & Still Readable

John gave me a tour of the facility where they create 3 D body imaging devices. They receive lots of grant money from the TSA. In 08, Congress never got around to finishing the spending bills, so their grant was cut in half. John thinks they'll get the money back in 09 and he's visiting DC next week. John travels internationally constantly 3 of 4 weekends & gave up his 45yrd line tickets because never able to go to games. Also runs another company that absorbs the rest of his time. He enjoys his work. His job entails meeting with prospective clients and current clients.

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**FACT-BASED CONTACT REPORT STYLE**

<u>Old Narrative Style</u>	<u>New Fact-Based Style</u>
<p>Name: Ms. Mary Billions  Contact Type: V Visit  Purpose: N Negotiation  Unit: ADS  Prospect ID: 999999  Proposal: 101010  Author: Mr. Raise Megabucks  Date: 2/8/2009</p> <p>Description:  Negotiation/Stewardship visit to discuss Mary's pending gift to the XX Department.</p> <p>Text:  Mary described some of the challenges that Get Gone Inc had to deal with in the uncertain economy. Get Gone Inc Inc's product is a polymer that interacts with various liquids to cause them to solidify and reduce their mass. The primary clients are medical facilities that have bio-hazardous liquids as a by-product of medical procedures and companies that generate toxic materials and waste that need to be solidified for easier disposal. With the medical clients, there are fewer instances of voluntary medical procedures which means there is less demand for his product. Companies that generate toxic materials are starting to defer their decision to remediate disposal of toxic waste given the current lenience with federal and state enforcement.</p> <p>We discussed her interest in naming the student XX chapter in the XX department, which is still on his priority list. She said that she is very committed to helping the student chapter and that it is exactly what she would like to do if not now, eventually. Given her situation, Mary is reassessing what her charitable giving could be particularly of the scope that we had discussed at \$100,000. Mary has told me that she will fund the scholarship awards for her underwater endowment.</p> <p>We talked briefly about her daughter Lillian and her decision as far as a college next year. She is leaning very favorably towards NC State XX but she has also been accepted by Georgia Tech and is waiting to hear from Texas.</p> <p>Mary asked me about the quality of the new board members coming onto the NCXXX board. I highlighted the five new board members that we had oriented the previous week.</p> <p>As we concluded our visit, Mary mentioned that she was looking forward to coming to campus this coming Monday, February 23 to speak to one of Dr. Go Get'em's classes about career opportunities for XXs. She said that she always enjoys most meeting with students and continues to be greatly impressed by their intelligence, work ethic and high ideals which she says continues to inspire her and affirm her strong interest at NC State.</p>	<p>Name: Ms. Mary Billions  Contact Type: V Visit  Purpose: N Negotiation  Unit: ADS  Prospect ID: 999999  Proposal: 101010  Author: Mr. Raise Megabucks  Date: 2/8/2009</p> <p>Description:  Possible \$100K for XX dept &amp; \$8K for underwater endowment support</p> <p>Text:  MB's company, Get Gone Inc, now faces an uncertain economy. Its product is a polymer that interacts with various liquids to cause them to solidify and reduce their mass. Primary clients are medical facilities that have bio-hazardous liquids as a by-product of medical procedures and companies that generate toxic materials and waste that need to be solidified for easier disposal. Medical clients have fewer instances of voluntary medical procedures and less demand for his product. Companies are starting to defer their decision to remediate disposal of toxic waste given the current lenience with federal and state enforcement.</p> <p>Although she remains very committed to naming of the XX's student chapter, MB is pondering how to integrate the \$100K price into her charitable giving. MB did commit \$8K to fund the scholarship awards for her underwater endowment.</p> <p>RM highlighted the five newly oriented members in response to MB's query about NCXXX board member quality. MB looks forward to speaking next week at Dr. Go Get'em's class about career opportunities for XXs; the students' intelligence, work ethic and high ideals inspire her &amp; affirm her strong interest NCSU. Daughter, Lillian, is leaning very favorably towards NC State XX but she has also been accepted by GA Tech and is waiting to hear from Texas.</p> <p>Next Step: confirm \$8K commitment.</p>