

Taken from “The Joy of Asking – An Analysis of Socioemotional Information in Fundraiser Contact Reports”

### **Concept Contact Report**

*Every interaction between a donor and a fundraiser will be guided by the situation on the ground, and the resulting Contact Reports vary widely in what topics are included. Each Contact Report is unique, but our research shows that only a limited number of themes make up the bulk of what is written. It is possible to reverse engineer a template Contact Report from the coding manual for Examining Fundraiser Social Skills, including as many of the codes as possible. None of the codes are mutually exclusive, even if sometimes (especially with the fundraising focused codes), their simultaneous appearance would, and should, raise eyebrows. Below is an example of a contact report with all codes included. Please refer to the next page to see an annotated version. Below is a fictitious sample Contact Report with and without annotation.*

“Josephine McEnroe and I had lunch at the Gilded Beard on Waterloo Street, on February 16<sup>th</sup>. She had just returned from a slightly longer than usual stay at her vacation home in Cancun with her three favorite nieces. This was a stewardship visit, to thank her for her most recent gift to the University Medical Center annual fund.

After talking about the political climate, and her concerns of its effect on accessible health care, she told me that her role at the university children’s hospital board is changing. She decided to step down as board secretary, as the demands of the position and her own health were at odds with each other. I have been worried about her health for a while now, so this news was not entirely unsuspected. She told me that in no way this was supposed to be a signal that she would like to be less involved.

She told me a funny story about how during her own childhood, a nurse accidentally slipped on a bedpan and traversed the entire length of the ward wildly flailing her arms. While it was, in her words, a “formative experience under duress”, she fondly remembers the hospital staff, and especially, the late doctor Fletcher. Doctor Fletcher had, according to Josephine, an excellent bedside manner, and seemed both genuinely concerned with his patients, but also interested in exactly what symptoms they experienced. After I asked about the status of her estate planning, she told me plans to leave a portion of her estate to the UMC to honor Doctor Fletcher with a resident fellowship remain unchanged.

We spoke briefly about the UMC’s progress on the new Bedside Manner Laboratory that is in development by Professor Carla Ramos, our newest tenure track faculty member. I explained how Dr. Ramos studies the influence of empathy on patient health outcomes in a clinical setting and in collaboration with a great variety of specialties. Josephine indicated that she believes this to be an important development, especially seeing the need for inter-specialty collaborations among the UMC’s faculty.

Next time we meet will be at the Academy of Medical Breakthroughs Ceremony next month. I hope to connect her to our new faculty member, Carla Ramos, at that time.”

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## Annotation

### Introduction

“Josephine McEnroe and I had lunch at the Gilded Beard on Waterloo Street, on February 16<sup>th</sup>.”

- *Attention to Detail.* The fundraiser records the place and date of the interaction

“She had just returned from a slightly longer than usual stay at her vacation home in Cancun with her three favorite nieces.”

- *Unrelated Conversation.* “Slightly longer than usual.” This could require elaboration, or could be for uninteresting reasons. The text indicates the fundraiser knows more about the “normal” length of Ms. McEnroe’s vacations
- *Life Events.* The donor went on a vacation
- *Qualification.* The Donor appears to have a vacation home in Cancun. This may or may not be an asset that is involved with the planned gift later on
- *Important Relationships.* The donor has three favorite nieces

“This was a stewardship visit, to thank her for her most recent gift to the University Medical Center’s annual fund.”

- *Stewardship.* This term, as well as the mention of a recent gift indicates this is stewardship activity.
- *Expressions of Gratitude.*

### Current Affairs

“After talking about the political climate, and her concerns of its effect on accessible health care, she told me that her role at the university children’s hospital board is changing. She decided to step down as board secretary, as the demands of the position and her own health were at odds with each other. I have been worried about her health for a while now, so this news was not entirely unexpected. She told me that in no way this was supposed to be a signal that she would like to be less involved.”

- *Unrelated Conversation.* They discussed politics, however, what specific political leanings they talked about is not clear.
- *Donor Attitude, emotion, and or Disposition.* The donor’s concerns are noted.
- *Qualification/Cultivation.* Her role as a volunteer is changing due to health issues, but that she would like to be in the know at least, if not involved in some way.
- *Theory of Mind.* Her concerns indicate Theory of Mind in the Fundraiser.
- *Life events.* The donor tells the fundraiser that her health is sufficiently poor to have to cut down on board activities.
- *Care for Donor.* The fundraiser says he or she is concerned with the donor’s health.

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### *Connection to Cause*

“She told me a funny story about how during her own childhood, a nurse accidentally slipped on a bedpan and traversed the entire length of the ward wildly flailing her arms.”

- *Unrelated Conversation.* This story shows attention to what the donor said, but is only tangentially related to the donor’s connection to the cause.
- *Care for donor.* Describes the story as funny.

“While it was, in her words, a “formative experience under duress”, she fondly remembers the hospital staff, and especially, the late doctor Fletcher. Doctor Fletcher had, according to Josephine, an excellent bedside manner, and seemed both genuinely concerned with his patients, but also interested in exactly what symptoms they experienced.”

- *Donor attitude, emotion, and/or disposition.* The fundraiser picks up on the struggle her childhood health must have been.
- *Donor Background.* Childhood illness.
- *Important Relationships.* Dr. Fletcher seems to have made a lasting impression.
- *Donor Connection to Cause.* The reason why she is involved is clearly the fact that she was helped in her childhood reach health by a friendly doctor.

### *Discussion of Giving*

“After I asked about the status of her estate planning, she told me her plans to leave a portion of her estate to the UMC to honor Doctor Fletcher’s memory with a resident fellowship remain unchanged. I thanked her for this, and told her I would follow up with our planned giving officers to make sure we have this recorded on the University side.”

- *Solicitation.* The fundraiser asks the donor for a planned gift.
- *Qualification.* The donor indicates that she has an estate plan, and that she has plans for a gift.
- *Follow up.*

“We spoke briefly about the UMC’s progress on the new Bedside Manner Laboratory that is in development by Professor Carla Ramos, our newest tenure track faculty member. I explained how Dr. Ramos studies the influence of empathy on patient health outcomes in a clinical setting and in collaboration with a great variety of specialties. Josephine indicated that she believes this to be an important development, especially since she understands the need for inter-specialty collaborations among the UMC’s faculty.”

- *Cultivation.* The fundraiser describes a program he or she believes the donor will be interested in, as evidenced by the paragraph’s about the donor’s interests and connection to cause, and suggests another linkage: Dr. Ramos.
- *Theory of Mind.* Here the fundraiser shows they heard the donor say that she believes in this particular program and the underlying values.
- *Attention to Detail.*

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*Evaluation and Follow Up*

“I think she received the news of this development well.”

- *Self-evaluation.*

“Next time we meet will be at the Academy of Medical Breakthroughs Ceremony next month, I hope to connect her to our new faculty member, Carla Ramos, at that time.”

- *Follow up*