

## Document Donor Contacts

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Most planned gifts are the result of careful preparation and planning, as well as a series of donor visits or contacts conducted over time by one or more staff members or volunteers from your organization. Close communication and effective teamwork is paramount.

A crucial, and at times overlooked, step is for the nonprofit representatives to write up donor contact reports along the way. These vital reports usually are kept under lock and key in your organization's confidential donor file — documenting what transpired and what you learned along the way as you established this gift.

Well-written donor contact reports serve a multitude of purposes. They . . .

1. *Help you prepare a winning donor proposal.* Conscientiously write down all the detailed information you collect during a visit with a prospective donor. During the visit and again when you return to your car, jot down any details you can recall: family names and birth dates, financial holdings (cost basis and current value), estate plans the donor currently has in place, family relationships, tax bracket, advisors' names, and the prospect's overall financial and estate-planning goals.

2. *Help you and your organization build a meaningful, long-term relationship.* Capturing all the intangibles that help you match the right project or organizational need to the prospect's interests and values will help you and your organization build a meaningful relationship and work effectively with this person.

On your donor contact report, record personal history, alma mater, values and interests, pet names, feelings about your cause, reactions to your organization's needs, other causes they support, life stories (if appropriate), and the prospect's desire or reluctance for donor recognition or naming opportunities.

3. *Facilitate communication between you and other members of your team.* Your donor contact reports should outline essential follow-up steps, such as: legal or tax-related questions that you might need to research or get back to the donor on, persons you need to contact and work with to put a successful donor proposal together, and your team strategy for the next visit.

4. *Serve as a permanent record for the organization of what transpired in the course of putting the gift together.* Many years down the road, your organization will rely upon your written records in the event of potential litigation by disgruntled heirs or in the event that undue influence is alleged.

Since careful records can protect against litigation, it's important to state the context for donor meetings and gift negotiations. Note the donor's state of mind, which family members were present at each visit, whether the donors were represented by outside counsel, and whether they sought the advice of their own counsel.

Now that you understand the importance of well-written donor contact reports, make it a priority to educate your volunteer solicitors and development staff as well. To make it easy to implement, consider creating a fill-in-the-blanks form that your volunteer solicitors can complete and turn in after visits. With practice and understanding, donor contact reports will come naturally and be the first thing you and your team do after each donor visit.