

Call Reports for Major Gifts Fundraising: THE BASICS

What are call reports?

- Written record of actions
- Substantiation of meetings, conversations and other forms of communication
- Documentation of pertinent information
- Outline of plans
- Communication to colleagues (present), successors (future) and leadership

What call reports aren't.

- A place to record highly personal or damaging information
- A written vehicle to speculate about donor motivations
- A tool to inflate performance

Why they are important.

- To provide historical perspective
- The opportunity to provide information connecting organizations to donors, organizations to other organizations and donors to donors
- They are a road map of past actions and future plans

Contents of a useful call report.

- Type of contact: phone, email, correspondence, face to face meeting, encounter at an event
- The purpose of the contact: qualification, cultivation, solicitation, stewardship or volunteering
- What transpired: This portion of the call report should tell:
 - When the contact occurred and if applicable or important where the contact took place
 - Donor home
 - Place of business
 - Attorney's Office
 - Who was involved in the contact by name including donors/prospects, development staff, other organization personnel, volunteers and any other individuals integral to the action (attorneys, other family member or business colleagues etc.)
 - What was discussed, communicated or requested during the interaction. This summary should be clear, succinct, objective and development-oriented
 - What are the next steps of action

An example:

On 6/6/11, Pam Hurd-Knief (DO from the School of Engineering) met with Mr. & Mrs. X in their home to present a formal written proposal soliciting them for a major gift. The couple's children, Thomas and Susan were also present during the discussion.

The proposal addressed the couple's interest in creating an endowed professorship in Civil Engineering and in also creating an endowed undergraduate scholarship for non-lottery eligible students. As acknowledged during a previous meeting, all four members of the family are UNM Civil Engineering alums. Their stated intent in making multiple planned gifts to UNM is to thank the University for the great education they received and resulting professional success.

The couple was very receptive to the proposal and asked for specific follow up actions:

- 1) That Pam attend a meeting with their financial planner, Ms. Y to overview the request
- 2) That Pam prepare draft endowment agreements for the professorship and scholarship including suggested defining criteria for the couple to consider

NEXT STEPS: (for the Development Officer)

- 1) Prepare for the meeting with the financial planner by reviewing giving history and known financial info about the couple
- 2) Develop draft endowment agreements for the couple's review in collaboration with Department Chair
- 3) Share draft agreements with the couple at or after the meeting with the financial planner based on the outcome of that meeting