





BLACKBAUD'S  
**2008**  
CONFERENCE  
FOR NONPROFITS

**Enhancing the Partnership Between  
Development Officers and  
Development Services**

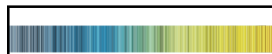
Charleston, SC  
November 16-19, 2008

**Blackbaud.**

Mary Butler, Sr. Major Gifts Officer, Children's Hospital and Clinics of Minnesota Foundation

Chris Courchane, Sr. Data Management and Report Specialist, Hazelden Foundation

November 17, 2008



Enhancing the Partnership Between Development Officers and Development Services

## Introductions

- ◆ Mary Butler, Sr. Major Gifts Officer, Children's Hospital and Clinics of Minnesota Foundation
  - About Children's Hospital
    - Serving as Minnesota's children's hospital since 1924, Children's is the seventh-largest children's health care organization in the U.S., with 332 staffed beds at our two hospital campuses in St. Paul and Minneapolis. An independent, not-for-profit health care system, Children's provides care through over 14,000 inpatient visits and more than 200,000 emergency room and other outpatient visits each year.
  - About Mary
    - Employed in the non-profit sector since 1986 serving primarily as a development professional but also spent 2 years working in volunteer management.
    - Areas of expertise include: Major gifts, annual fund, events, corporate and foundation work, volunteer management, fiscal management, strategic planning and training.

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## Introductions

- ◆ Chris Courchane, Sr. Data Management & Report Specialist, Hazelden Foundation
  - About Hazelden:
    - Hazelden, a national nonprofit organization founded in 1949, helps people reclaim their lives from the disease of addiction. Hazelden has facilities in Minnesota, Illinois, New York, and Oregon.
  
  - About Chris:
    - Employed in Non-Profit Development since 2001
    - Reports, Import/Export, Prospect Management, Policy & Procedure documentation

## Why we're here

- ◆ The goal of this session to share with you how a development department can be strengthened and achieve better results when strong partnerships are developed between gift officers and their research/advancement services department.

## Tools in the Toolbox

- ◆ Raiser's Edge
  - Actions
  - Constituent Codes
    - Suspects
    - Prospect
  - Home Page
    - Reports – Custom and Standard
    - Queries
  - Prospect Strategy
    - Notes tab

## Tools in the Toolbox

- ◆ Other communication tools
  - Assignment Request Form (e-form)
  - Ticket Tracker (e-form)
  - Face-to-Face
  - Phone
  - E-mail

## Actions: Why they're important

- ◆ Key Communication Tool
- ◆ Institutional Memory
- ◆ Management Tool

## Actions: 2-Way Communication

- ◆ Research to Development Officer
  - Launch Discovery Calls in Open Actions
- ◆ Development Officer to Research
  - Pertinent details about visit
    - The 3 A's
      - Affinity
      - Ability
      - Access
    - Prospect's relationships
  - Qualification of Suspects

## Actions: What information is important?

- ◆ Development Officers can use Action Attributes to “flag” Actions with pertinent details
  - Result of qualification of suspects
  - Information about relationship to the Organization
    - Helpful for organizations that must comply with HIPAA
  - New demographic information

## Constituent Codes: Tracking Prospect Pools

- ◆ Flag the pool of “eligible” Suspects and Prospects
  - **Suspects:** Individuals with characteristics we believe make them likely to be prospects
    - Self identified through Call Center
    - High screening score
    - Wealthy zip code, prominent profession, gift type, gift size
    - Internal flags (event participation, referent, etc.)
  - **Prospects:** Any individual the Research Analyst believes could be a prospect, based on information found in research
    - Could come from Suspect pool, monthly patient list, or other staff leads
    - Researched individually by Research Analyst
    - Believed to be able to make a gift of \$25,000+

## Constituent Codes: Tracking Prospect Pools

- ◆ Trip Builder Lists
  - List of Suspects and Pre-Qualified Prospects living in the area in which a Development Officer will be traveling
- ◆ Prospect Pools for Discovery Calls
  - Development Officers (Major Gift Level)
  - Associate Development Officers (“Mid Level Pool”)
- ◆ Discovery Actions for Pre-Qualified Prospects
  - Launched by Research Analyst for specific Development Officer

## Raiser's Edge Home Page

- ◆ Favorites
  - Prospect Lists
  - Custom Reports
- ◆ Dashboards
  - Proposal pipeline
  - Recent Gifts
  - Campaign/Fund Analysis
- ◆ Action Reminders

## Prospect Strategy

- ◆ The Prospect Strategy is used to capture the overall plan and story for the prospect in one place. It should contain a step-by-step strategy to:
  - Develop the prospect's affinity for a specific program or need.
  - Gain or strengthen access to the prospect
  - Identify gift planning opportunities to expand ability to give at the desired threshold amount or more.
  - Fluid, dynamic document

## Other Communication Tools: Ticket Tracker

- ◆ Provides a form for Development Officers to request jobs
  - Reports
  - Prospect Lists
  - Specific research needs
- ◆ Tracks Advancement Services jobs
  - Measures productivity
  - Institutional Memory for projects (It's like a Call Report for Researchers!)

## Other Communication Tools: Assignment Requests

- ◆ Electronic form for Development Officers to submit requests for assignment to prospects
- ◆ Tracks assignments made by Research staff
- ◆ Function to communicate approval or need for more information with Development Officer

## Other Communication Tools: A Novel Approach

- ◆ Talk to each other!
  - Face-to-Face
    - Prospect Strategy Meetings
    - Weekly “Stand-up” Meetings
    - Portfolio review meetings
  - E-mail
  - Phone

## Questions?

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