Supplemental Reference Guide for:

BEST PRACTICES: INTERACTIONS

Authoring Department: ADVANCEMENT SERVICES

Contact: KERRY ACKER
KERRY.ACKER@nufoundation.org

Anticipated Audience(s): UNIVERSITY USERS

Version 1.0 – last updated 04/13/2017

Introduction

The ***Ali*** user community shares the system as a primary source of information in their respective responsibilities. The purpose of documenting interactions is to record pertinent information that helps to define the current state of relationship between the constituent and the University of Nebraska. Therefore, it is critical to ensure that this system of record contains timely, complete and accurate information. ***Ali*** users should use discretion in determining what qualifies as pertinent information to include. See the **Broad Framework for Interactions** and **Best Practices** sections for additional guidance.

Broad Framework for Interactions

University Users

1. Interactions
    a. Will be viewable by Foundation users and some University ***Ali*** users
    b. Should pass the "newspaper test"
    c. Should include basic information about what occurred
    d. Should be treated similarly to university correspondence

Best Practices

At minimum, all interactions should:

- Include all pertinent information that helps to advance the relationship with the prospect.
- Be entered into the *Ali* no later than the 5th of each month, although is recommended to be entered within 10 business days of the contact.
- Use preferred names and titles, and refrain from the use of acronyms and nicknames (even if they may be well-known at the time of entry).
- Not include negative commentary especially regarding sensitive personal information (e.g. messy divorce situations, opinions of personal appearance, etc.). See the Foundation's **Information Disclosure Policy** for guidance. If it is not relevant to the prospect's relationship with the university and foundation and/or would embarrass the constituent, do NOT put it in the contact report. If information perceived as embarrassing is nevertheless important, relay it to the appropriate staff verbally.
- Include the name and title of the person(s) with whom you met, if you met with representatives of an organization.

Summary Examples

Preferred	Insufficient
Introductory qualification visit	Had lunch with Bradley
Provided case statement and identified interest	Met at Jamie's office
Scheduled meeting for next week	Called Renee
Birthday greetings	Sent letter
Invited to tour campus	Emailed Paul
Thanked for recent gift	Mailed Thank you
Fielded questions about campus speaker	Blanche called
Made gift solicitation	Golfed with Christine
Gave her the stewardship book	Ate with her at Café Grande
Received notice of funds transfer	Fax received

Comment Examples

Newspaper Ready	NOT Newspaper Ready
He was initially reticent, but warmed up after some initial conversation.	He was initially reticent, but warmed up after a couple martinis.
They are interested in making a gift for faculty support.	They are interested in making a $3m-$6m gift for faculty support.
There are supporting their son through some health challenges.	Their son has been diagnosed with bipolar disorder and they are supporting him financially.
He is experiencing a health challenge and he should not be contacted.	He has Alzheimer's Disease and he should not be contacted.
She indicated that she would financially support the college, though the timing is not right.	She indicated that she will not provide financial support until Dean Pillars leaves the college.