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## Higher Education Fundraising Toolkit

A guide to recruiting and retaining the best people for an emerging profession

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## Recruitment Guide

- 1.** The development of fundraising as a career and profession in the UK is still in its infancy, yet the demand for effective fundraisers has increased sharply over the past 10 years. This need is set to grow further, with mainstream charities, arts and heritage organisations looking to diversify their funding sources and new initiatives developing in the health sector. In order to attract scarce talent, the test for the education sector is whether their recruitment strategies can differentiate the opportunity, attract eligible candidates, provide fair and efficient recruitment processes and select for suitability.
- 2.** Before embarking on a recruitment drive, the institution must be able to articulate clearly its long-term strategic plan and be committed to its delivery. They must also be clear about the contribution and role of the fundraising effort.
- 3.** An experienced fundraising professional knows that success in a new role depends heavily on the organisation's leadership team, the quality of their long-term planning, their interest and engagement in the fundraising effort and the personal chemistry of the relationship between the chief fundraiser and the vice-chancellor, director or principal.
- 4.** The clarity of the mission, the coherence of the long-term plan, clearly defined fundraising objectives and an understanding of senior volunteer contributions are essential to facilitate the creation of a relevant job description and realistic person specification, from which an appropriate recruitment strategy can be developed.
- 5.** The most appropriate recruitment strategy will depend on the university's reputation and profile, potential career opportunities, the remuneration package versus market rates and the degree to which the role is deemed critical to success. Universities that differentiate through their vision can often attract exceptional candidates that empathise with their work.
- 6.** Having decided on how the role should be positioned, the scope of the opportunity and remuneration on offer, the next decision is how it should be marketed to maximise a quality response, how that response should be dealt with and who should manage the process.
- 7.** Typically, for the less critical positions, larger organisations that have the capability will manage the process themselves, sourcing candidates by marketing through advertising for maximum response, occasionally looking to recruitment agencies for additional candidates. Again for less critical positions, small to medium-size organisations may look to recruitment agencies to advertise on their behalf, sift CV's and arrange interviews.
- 8.** For a position that is critical to the success of a fundraising initiative and where talent is scarce, use of a specialist recruitment consultancy should be considered. This is a consideration for larger organisations in particular, as the rigour of the recruitment process plays a large part in determining the success of the assignment. A specialist consultancy should bring in-depth knowledge of the sector and candidate market, assist in the development of job descriptions and

person specifications, advise on advertising and candidate-sourcing, have access to a wide network of candidates and offer a seamless process, working closely with clients and candidates throughout.

9. A successful recruitment strategy must be approached in the same way as any successful marketing strategy, and should be as well planned. A strong commitment of resources by all involved to develop excellent lines of internal and external communication, predetermined guidelines for all participants, and established time and review parameters, brings an added value to the organisation through a cost-effective hiring and retention process. The better the recruitment and selection process, the more likely the successful candidate is to stay with the organisation for the longer term.

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## Recruiting a fundraiser for a critical position

### 10. Key points in the recruitment process:

#### The brief

11. As in any project the quality of the brief will have a strong bearing on the success of the recruitment process and the quality of the appointment made.
12. Key points:
  - Decide who will be on the recruitment committee and ensure that those involved have a shared commitment and understanding of the fundraising goals;
  - Be realistic about recruitment timescales and that those involved will be available as required;
  - Gain full agreement on a realistic budget required for fundraising;
  - Create an organisation chart that reflects the importance placed on fundraising;
  - Offer an opportunity that has flexibility in terms of remuneration, additional benefits, working conditions and hours worked;
  - Describe the organisation's values and culture;
  - Be clear on who will lead the recruitment effort and what resources are available;
  - Prepare a full portfolio for candidates containing background information about the organisation, the job description, organisation structure, the role, critical success factors of the role, key responsibilities and person specification including competencies. This information pack should also contain clear guidelines on how to apply, the closing date and selection process.
13. Of the above, the document that is most important to get right – in a market where demand for experienced, talented fundraisers far outstrips supply – is the person specification and competencies needed. Using the competency models attached, it is important to work through what really is essential and what is desirable for each post. For example, for most fundraising positions postgraduate qualifications and foreign language skills may be desirable, but rarely essential.
14. The most important competencies common to most fundraising roles, according to a survey carried out as part of this review and modelled on the Harvard-Stanford Ivy study 1985, are:
  - Intelligence and intellectual curiosity;
  - Good judgement/intuition;

- Influence and persuasiveness;
- Oral communications;
- Empathy/listening;

**15.** The least important competencies for a fundraiser, as opposed to a manager of fundraisers, are:

- Facility with technology;
- Fundraising expertise;
- Knowledge of the constituency;
- Boldness;
- Tax-effective giving expertise.

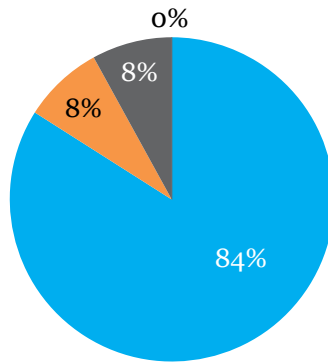
**16.** The above illustrates the importance of identifying the core competencies that are critical for success. These will be different for major gifts, annual giving, corporate giving etc. They will also be different depending on the level of the role within the team and the size and scale of the fundraising operation. Depending on the faculty or specialist area of fundraising, it is important to have an interest in building knowledge in medicine, the arts, scientific research etc.

**17.** As the sources of potential candidates fall into four broad categories (see below), universities will increase their chances of success if they identify and decide which source they are targeting:

- Graduate trainees – 'grow your own' – long-term approach;
- Imported talent – mainly Canada and the USA – key issues are cultural adaptability;
- Experienced fundraisers in the UK – relatively few on the market at any time;
- Transferable skills candidates – a much wider talent pool that could be harnessed (although it will be important to assess their readiness to adapt to a new environment).

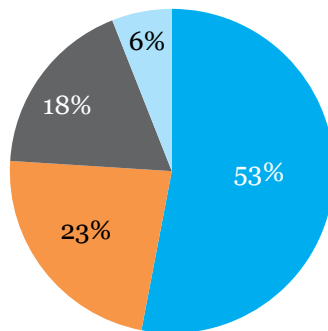
## Director of Development

■ Education ■ Arts/Culture ■ Charity ■ Transferrable skills



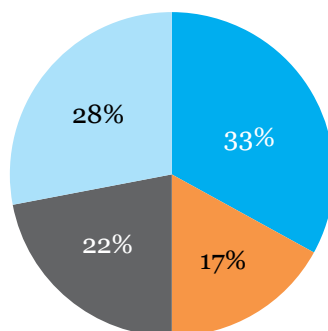
## Heads

■ Education ■ Arts/Culture ■ Charity ■ Transferrable skills



## Manager

■ Education ■ Arts/Culture ■ Charity ■ Transferrable skills



## Recruitment

18. With a clear brief, those responsible for the recruitment effort will be in a better position to present and differentiate the opportunity through the most appropriate media and to attract and source applicants of the right calibre and quality during the recruitment stage.
19. Key points:
  - Try to differentiate the opportunity by emphasising the university’s vision and values. For many prospective candidates this will be inspirational.
  - Advertisements should give an honest and realistic description of the job as this is proven to improve retention. Keep the advertising copy simple and make sure there is a “call to action” e.g. download the information pack, call the recruiter etc.
  - If you are working with a recruitment consultancy, make sure they are interested in your sector and understand your values, as they will be the representative face of your organisation.
  - Make sure your advertisement and information for candidates adhere to employment and data protection legislation.
  - Be accessible to potential candidates and provide them with realistic deadlines.
  - Advertise the opportunity through appropriate media; expensive broadsheet advertising is rarely used these days – it is costly and not the most effective tool.
  - Make good use of social networks, especially the university's alumni base and Linked-In. Use some of the same marketing techniques that are deployed to attract students, to connect with alumni, and to attract academics with rare skills. Work closely with the marketing and communications department to ensure the opportunity is widely marketed to relevant audiences.
  - Use specialist job boards, websites e.g. CASE, Guardian Jobs, Third Sector. There are many special interest groups for the different types of fundraising specialisms: planned giving, major gifts, trusts and foundations etc. They are changing all the time, so make sure you do a fresh search each time to see what's new. Ask colleagues what they have used that worked for them.
  - Make sure that all potential candidates receive the information about the opportunity in good time to make their application.

## Selection

20. Key points:
  - It is important to retain an objective attitude when deciding which candidates to interview.



- Refer to the person specification and rate the candidates against the essential criteria.
- Use an assessment sheet (sample attached).
- If your organisation uses psychometric assessments, decide when in the process you want to apply them and make sure the candidates are aware of this.
- Unsuccessful candidates must be informed in good time and thanked for their interest in the opportunity and the organisation.

## Interview

### 21. Key points:

- When inviting candidates to interview it is important to offer a few options as good candidates are usually busy people.
- A first informal interview is much appreciated by candidates – especially for senior level appointments. The best interviews are a two-way process of giving and getting information.
- If your final stage of interview is a formal panel including academics and senior management make sure that everyone is in agreement about what you are assessing and the role each panel member will play.
- Candidates are making their own assessments of the organisation and the opportunity at every stage of the interview process – being open and managing the process efficiently is important for success.
- At the final stage it is often the most suitable candidate who will be selected rather than the most eligible. Ideally the preferred candidate will be both eligible and suitable.

**22.** A range of selection tools needs to be used, not just the traditional interview in order to minimise risk. The design of a process that assesses all the key requirements may include: written exercises, role plays, presentations, group discussions, peer interviews or interviews by the team (need careful management), interviews based on values and behaviour, psychometrics, aptitude tests like verbal and numerical reasoning. This is particularly important for transfer skills candidates when potential is being assessed, not just current skills and knowledge. For key roles the design of an assessment day, part of which will involve selling the institution to the candidate, may be appropriate.

## Offer stage

**23.** This can be one of the most delicate stages in any recruitment process. Be clear about who is handling the negotiations and what the parameters are. Candidates are in high demand and may be in receipt of several offers – so yours needs to be handled carefully and remain a top priority. If you have listened carefully to what the candidate has said they are looking for in their next career move, then this negotiation should be reasonably straightforward. Flexibility is often worth more than salary to candidates at certain stages of their career.

- 24.** Once you have concluded the negotiations, follow up promptly with an offer letter and employment contract. Do make sure that these are “subject to satisfactory references” and that referees are followed up – preferably by phone.

### Conclusion

- 25.** In essence, approach the recruitment of a fundraiser as you would any other critical, important project for your university. Think it through carefully, make sure you know what you are looking for and remember it’s a two-way process. If you choose the right person, they can make a huge difference to the future of the organisation. A final word of warning: “appoint in haste – regret at leisure” - take time to get it right.

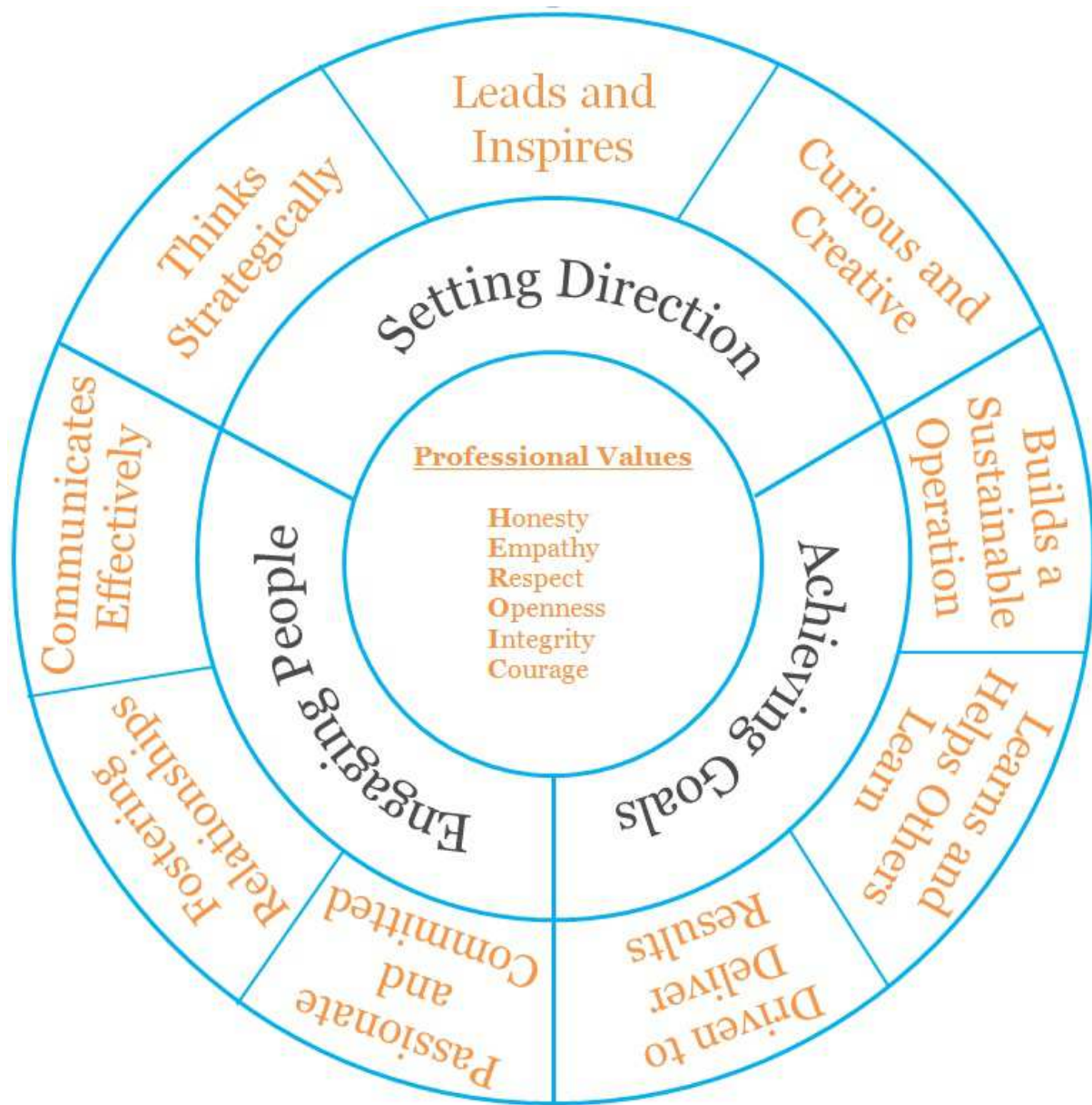
## Assessment Sheet

26. It will be important to review and amend this to take into account your own institution and its values as well as the competencies needed for each post as it arises.

<b>Competencies evaluation</b>			
<b>Knowledge and experience</b>	Low	High	Comments
▪ Fundraising	1	2 3 4 5	N/A
▪ Institutional knowledge	1	2 3 4 5	N/A
▪ Relationship building	1	2 3 4 5	N/A
▪ Management	1	2 3 4 5	N/A
<b>Skills</b>			
▪ Speaking	1	2 3 4 5	N/A
▪ Writing	1	2 3 4 5	N/A
▪ Listening	1	2 3 4 5	N/A
▪ Planning and organising	1	2 3 4 5	N/A
▪ Strategic thinking	1	2 3 4 5	N/A
▪ Attention to detail	1	2 3 4 5	N/A
<b>Personal attributes</b>			
▪ Integrity	1	2 3 4 5	N/A
▪ Initiative	1	2 3 4 5	N/A
▪ Maturity/judgment	1	2 3 4 5	N/A
▪ Sensitivity/empathy	1	2 3 4 5	N/A
▪ Flexibility/tolerance	1	2 3 4 5	N/A
▪ Confidence	1	2 3 4 5	N/A
▪ Humour	1	2 3 4 5	N/A
<b>General evaluation</b>			
▪ Will relate to office and institution	1	2 3 4 5	N/A
▪ Proactive/goal-oriented	1	2 3 4 5	N/A
▪ Positive attitude	1	2 3 4 5	N/A
▪ Will work well with donors and stakeholders	1	2 3 4 5	N/A
▪ Capacity for independence	1	2 3 4 5	N/A

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## Overview of HE Fundraising Competencies



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## Retention Guide

### Employee retention strategies

- 27.** Having invested time and money in the recruitment process it is critical to retain good people and maximise the contribution that they can make to the goals of the institution. There are numerous statistics that quantify the cost of employee turnover. However, you do not have to study these to appreciate the negative impact of losing the accumulated skills and knowledge of a good person:
- Replacement costs;
  - Operational disruption;
  - Loss of institutional knowledge;
  - Induction and training costs for new employee;
  - Lack of continuity for donors;
  - Pressure on remaining team members;
  - Lowering of team morale;
  - Diversion of energy internally;
  - Pay inflation.
- 28.** It therefore makes sense to plan strategically to improve employee retention. The following is a guide to some of the things that can be done to tap into the needs and motivations of individuals with the aim of reducing staff turnover.
- 29.** Employee retention is particularly important in our sector not only because experienced fundraisers are in great demand, and therefore in short supply, but owing to the nature of the work they do. There is a breadth of knowledge and skill required and as a relationship-based business, the disruptive and negative impact of losing people has an even greater impact. There is not a single answer to the challenge of keeping people; every individual has different needs and motivations. However, it is no surprise that managers who focus on the person, as well as the task, have lower rates of staff turnover.
- 30.** Understanding why people leave is a first step to doing something about it. Maintaining effective two-way communication is important, but it is also possible to gather insights through more systematic means including exit interview. Other ways to collect data about levels of satisfaction are attitude surveys and feedback both informally and formally through the performance review process and regular one-to-one meetings. Research shows that if people are given the

opportunity to express their aspirations or dissatisfaction and have their opinions heard they are less likely to leave.

- 31.** Reasons for leaving can be divided into “pull” factors and “push” factors. Pull factors are those things that make another job attractive: higher pay, promotion, increased responsibility, flexibility, location etc. Push factors are the things that cause dissatisfaction with the current role: low pay, poor management, lack of promotion prospects, not feeling valued etc. Identifying where you may be most vulnerable in terms of staff turnover gives you the information you need to take action.
- 32.** The following sets out some of the levers that may be used to improve employee retention.

### Pay and benefits

- 33.** Research indicates that pay alone does not result in employee satisfaction. It can however be a cause of dissatisfaction if it is perceived that the level of pay is unfair either in relation to the general market or internally. Keeping up to date with market rates and ensuring that remuneration is broadly fair across the team is important. Increasing salary to keep someone is often only a short-term fix. The survey of people in our sector that was undertaken for this report indicates that broadly speaking people are happy with their pay.
- 34.** Paying above market rates does not guarantee low turnover. Research shows that 80% of people are unlikely to resign to secure higher pay if they are happy in their job. The investment of money in other areas may well have a greater impact on satisfaction. However, where market rates for a group of staff, for example major gift fundraisers, are above the levels of pay for comparable roles in an institution it is sometimes appropriate to pay a market supplement. This can be a transparent and fair way of dealing with the problem and is normally preferable to manipulating the grading system to enhance the level of pay for the role.
- 35.** Performance bonuses are not commonly paid in our sector and the general wisdom around such schemes is that they should be introduced with caution. Again, fairness is important and individual bonuses are only successful where there is a direct correlation between the individual's performance and the payment – if there are factors that are outside the employee's control a bonus scheme may become a source of dissatisfaction. It is also important to ensure that bonus schemes do not reward short-term performance at the expense of the long-term goals.
- 36.** A team bonus scheme can be put in place and this can be a powerful driver towards collaboration and team cohesion. However, it is not successful unless it drives individual performance and this will only happen if the individual can see the link between their performance and the team bonus.
- 37.** Specific bonuses for excellent pieces of work or where people go beyond the call of duty can be motivational. One-off bonuses can also be used to reward key behaviours like team-working or the generation of new ideas.
- 38.** Rates of pay can be readily copied by others and therefore do not differentiate you as an employer. In the light of this, additional forms of reward have been developed, for example some organisations offer “golden hand-cuffs” or long-term incentive payments to encourage individuals to stay for a period of time. There is evidence that such schemes can act

psychologically to maintain commitment to the organisation for the period of the scheme. Some development directors have been offered a bonus provided they stay to complete a successful campaign.

39. HEIs often offer very good benefits packages and ensuring that employees understand and appreciate the scale of these is important; for example many people do not understand the true value of their pension provision.
40. Where employers can offer some flexibility in benefits this can be an advantage e.g. less pay for more holiday. These types of benefits can be very valuable to employees, and can be cost-effective and less easy for other employers to replicate.

### Recognition

41. Research shows that recognition is one of the key drivers of employee satisfaction. However, in a pressurised working environment it is sometimes too easy to move on to the next challenge without recognising and celebrating success. Non-financial recognition of an individual's contribution can be as effective as and sometimes more effective than financial reward. Often this is as simple as giving effective feedback and saying thank you. The following are some other ways to recognise achievements and contribution:
  - Ensuring that positive feedback from donors or senior managers is circulated;
  - Sending a personal thank you or asking the vice-chancellor to send a letter of thanks;
  - Ensuring that an individual's successes are made known to everyone – posting successes on notice boards or in newsletters;
  - Having an awards scheme e.g. employee of the month;
  - Providing exposure to senior management;
  - Providing a notice board in the office where people can put up a note when a colleague does something beyond the call of duty;
  - Offering development opportunities – training or interesting projects;
  - Giving a gift – flowers or chocolates.

### Training and development

42. Some individuals see the acquisition of transferable skills as key to their satisfaction. Research indicates that younger people (Generation 'Y') are less likely to have a sense of loyalty after having frequently seen their parents fall victim to corporate "downsizing". As a result, they know that they have to actively manage their career. They are interested in continuing learning and education and seek to acquire skills that will enable them to progress.
43. There is sometimes a concern that training will make a person more marketable and therefore less likely, rather than more likely, to stay. However, research suggests that if the training is part of a personal development plan that is tailored to the needs of the individual and paid for by the



employer it does generate employee loyalty. Generic training and professional qualifications are less likely to result in enhanced employee satisfaction than training that is specific to the individual. This suggests that managers should make full use of the internal training provision of the institution.

- 44.** Rewarding and recognising managers who develop their team can also be important. Some organisations set a personal objective for managers that relates to developing team members. This can contribute to embedding a people-focussed culture.

### Career development

- 45.** This is the most frequent reason given for changing jobs. This is consistent with the survey of our own sector produced for this report where career development was given as the most common reason for planning to leave the sector.

- 46.** As organisational structures have become less hierarchical it is now recognised that career development does not have to equate with promotion but may also be achieved through lateral moves that expand experience, or by the enhancement of an existing role. There needs to be flexibility in developing roles or increasing responsibility in line with the aspirations and motivations of individuals. Being clear with individuals about what skills they need to progress and how these can be acquired is key. Creating a climate where individuals feel they can develop can be promoted by:

- Filling jobs with internal candidates where practical;
- Encouraging conversations about career aspirations during performance review discussions;
- Agreeing the training and development individuals need to acquire the skills to progress;
- Thinking about succession planning and ensuring that talented people have the right skills to move up;
- Providing projects or assignments that the individual finds interesting and rewarding;
- Re-aligning responsibilities to give people more responsibility when they are ready;
- Moving people around the team to broaden experience.

- 47.** Research shows that job satisfaction is enhanced if the person has: variety; a sense of achievement; autonomy; responsibility; feedback and recognition. Keeping these things in mind when developing roles and building teams can aid retention.

### Flexibility in working arrangements

- 48.** Having a flexible approach to working arrangements can make a significant difference to an institution's ability to attract and retain good people. A responsive approach to people's personal circumstances and life-stage can generate job satisfaction and long-term loyalty. Examples of flexible working arrangements include:



- Flexitime;
- Job-sharing;
- Part-time work;
- Working from home;
- Compressed hours (long working days in return for a shorter working week);
- Term-time working;
- Staggered hours;
- Sabbaticals;
- Phased retirement;
- Phased return to work following maternity;
- Combining part-time work with consultancy

**49.** A creative approach to providing individuals with working patterns that meet their personal circumstances can provide a point of differentiation as an employer. The demographic of our sector lends weight to this with 74% of our survey respondents being female and 70% being between the ages of 25 and 44.

### Team climate

**50.** We work in a small industry and building a reputation as a great place to work can be dependent on the working environment. Paying attention to building a positive team climate is crucial. As our teams become larger and more dispersed this can become more challenging, but also more important.

**51.** Many factors contribute to a motivational team climate some of which are based on good management practice and have been mentioned above: clear and consistent performance management, training and development, reward and recognition, flexible working practices. It is sometimes said that people leave managers, not organisations.

**52.** The survey conducted for this report showed a clear correlation between good management and an individual's intention to remain in the sector. Effective leaders communicate with their teams, generate a sense of purpose, common goals and ownership and this people-focused leadership undoubtedly impacts positively on team climate. Regular and open communication can also reduce the disruptive and demotivating impact of uncertainty during times of change.

**53.** The impact of working in a sociable and friendly environment cannot be underestimated. 'Do you have a best friend at work?' is one of Gallup's 12 questions on its employee engagement survey. Taking time to provide opportunities for people to get to know one another can bring benefits.

54. In many ways our industry is fortunate. HEIs are dynamic, creative and exciting places to work. Encouraging our staff to become involved in the life of the institution and providing opportunities for development teams to feel a part of these communities can be motivational in itself.

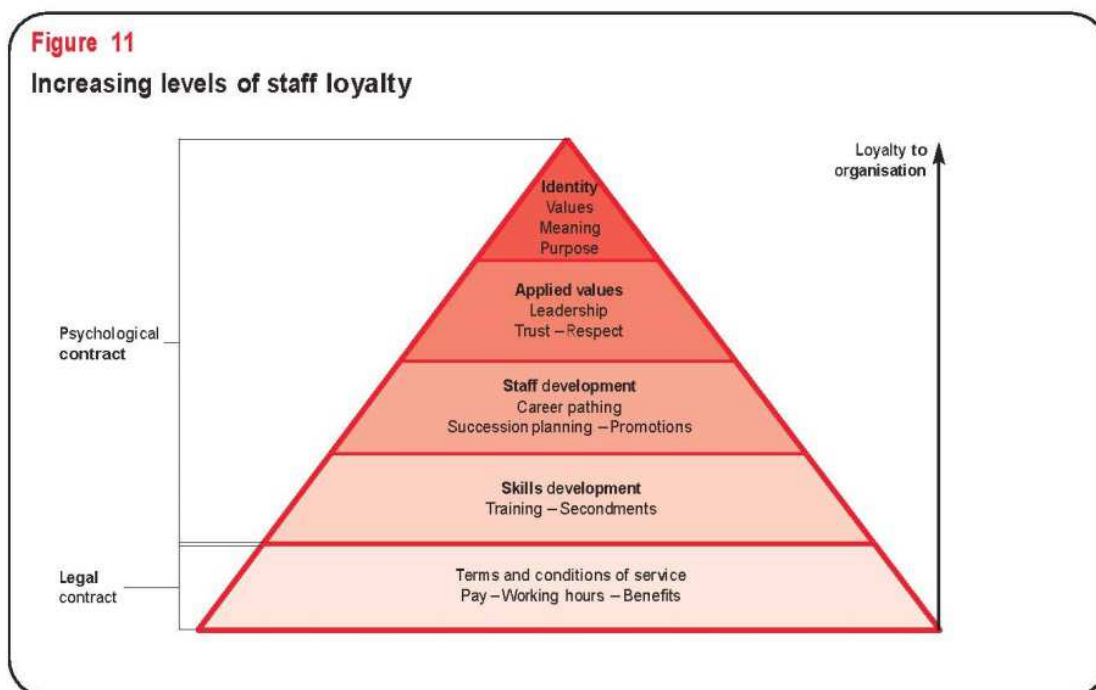
### Building a retention plan

55. Paying attention to retention issues and building an action plan can pay dividends. In order to achieve this, the following steps can be taken:

- Identify key positions and people;
- Understand the impact of losing them;
- Find out why these people leave the institution;
- Engage key employees in a two-way dialogue aimed at understanding what motivates them;
- Create targeted solutions with the objective of minimising the risk of them leaving.

### Summary

56. There is no magic solution to prevent or eliminate staff turnover. Retention strategies need simultaneously to target different layers of staff satisfaction and build staff loyalty as shown below. The higher one is promoted, the more unique the relationship between the institution and its staff and the harder it is for employers to replicate.



“The employer generally gets the employees he deserves.”

Walter Gilbey

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## Induction passport

- 57.** Research carried out for HEFCE’s Fundraising Workforce Review indicated that the seeds for a successful employer/employee relationship are often sown from the very beginning. Interviews highlighted the importance of a robust induction programme with some citing this as key tool in retaining talent. Well organised induction can help new starters to:
- Feel comfortable and supported by their line manager and colleagues;
  - Understand what is expected of them and what they need to do to be successful;
  - Know their way around the systems and processes in order that they can be effective as quickly as possible;
  - Know their key contacts;
  - Be able to explain what the office does, why it is important and how they contribute;
  - Feel committed and motivated.
- 58.** Often pre-planning is the key to a successful induction. A check list of actions as outlined below can help to ensure that a new post-holder is orientated in their new job as quickly as possible.
- 59.** One of the challenges is the volume of information that a new person needs to acquire when they first join a development office. Many people who join HE development teams have not worked in HE fundraising before and therefore they need to get to grips with the complexities both of fundraising and their institution.
- 60.** The time pressure on managers was cited as one reason why it is difficult to cover all appropriate ground with new starters. One solution used by the University of Oxford is to provide the new starter with an “induction passport”. This is a document which sets out everything a new starter needs to know/do in their first three months and whom to access or where to go for the right information. The document is given to new starters on Day One and it is up to them to complete it and ensure sign-off. The passport has a detailed “nuts and bolts” section as these are sometimes the areas that new starters struggle with most. At Oxford the new starter is asked to take their passport with them to their three-month review meeting.

UP AND RUNNING

<b>TIMEFRAME</b>	<b>ACTIVITY</b>	<b>ACTION/ CONTACT</b>	<b>COMPLETED</b>
<b>Day 1</b>	Introduce to person responsible for induction – usually line manager		
	Health and safety Emergencies and evacuation		
	Introduction to team		
	ID card issued		
	Tour of building		

TIMEFRAME	ACTIVITY	ACTION/ CONTACT	COMPLETED
<b>Week 1</b>	<p>Outline of the structure of the team and its purpose</p> <p>Introduction to Human Resources procedures, including sickness, annual leave, probation, performance reviews, computer use etc.</p> <p>Workplace assessment Data-protection guidelines and confidentiality Help with IT</p> <p>Additional expectations e.g. dress code, open plan working, use of telephones etc.</p>		

TIMEFRAME	ACTIVITY	ACTION/ CONTACT	COMPLETED
<b>Weeks 2-4</b>	<p>Summary of key fundraising projects/campaign goals</p> <p>Overview of the case for support</p> <p>KPIs and targets</p> <p>Introduction to each of the teams/areas of activity:</p> <ul style="list-style-type: none"> <li>Alumni relations</li> <li>Trusts and foundations</li> <li>Annual fund</li> <li>Legacies</li> <li>Major/Leadership gifts</li> <li>Stewardship</li> <li>Communications</li> </ul> <p>Overview of the institution, its structure and its top level strategy and goals.</p> <p>Agree personal objectives and review training needs to support these.</p>		

## FINDING YOUR WAY AROUND – “THE NUTS AND BOLTS”

### YOUR FIRST THREE MONTHS

#### RESEARCH

<b>I understand</b>	<b>Contact/Action</b>	<b>Date Completed</b>
The role of the research team		
How and when to make a research request		
How to access the Prospect Tracking databases		
The research information and how to locate it		
How to find prospect data and how to record prospect data on our databases		
How to record contact information on the database, and how to store related documentation electronically and physically, including: <ul style="list-style-type: none"><li>- Correspondence</li><li>- Meeting information</li><li>- Contact reports</li></ul>		
The research sources available and where to find them		
Whom to ask research questions		

INTRANET AND WEB SITE		
<b>I understand</b>	<b>Contact/Action</b>	<b>Date Completed</b>
How to access the Development and Alumni Relations intranet and find information		
The Development and Alumni Relations web site and how it is organised		

DATABASE		
<b>I understand</b>	<b>Contact/Action</b>	<b>Date completed</b>
How to access the Development Office database		
How to access contact records on the database		
How to find prospect data on the database		
How to flag a contact record as a potential donor		
How to update a prospect record with details of stage, status and interests		
How to have a list of my contacts extracted from the database		
The meaning and use of wealth screening codes		
How to produce letters to contacts from the database		
How to attach a document to a database record		
The implications of the Data Protection Act and know how to comply		
How to record and store information on the Development Office database		
How to ensure the security of data		



## FINANCE AND GIFT REGISTRY

<b>I understand</b>	<b>Contact/Action</b>	<b>Date Completed</b>
What to do/who should do what, when a donor makes a pledge or gift		
How the receipting processes works		
The process for distributing donations		
How income is reported		
How to find information on tax-efficient giving		
<b>Financial management</b>		
When and how the budgeting process works		
How to review management accounts for own area and how to feed back comments		
<b>Purchasing and expenses</b>		
How to purchase something		
How to claim expenses		
How to a arrange travel advance		
The rules for using credit cards and how to process the statements		

<b>DONOR RELATIONS</b>		
<b>I understand</b>	<b>Contact/Action</b>	<b>Date Completed</b>
The process for thanking donors when a gift or pledge is made		
Any best practice guidelines on stewardship		
How donors are recognised		
Key donors/supporters		
Donor reports and what goes into them		

<b>EVENTS</b>		
<b>I understand</b>	<b>Contact/Action</b>	<b>Date Completed</b>
Summary of event calendar		
How events are planned and executed		

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