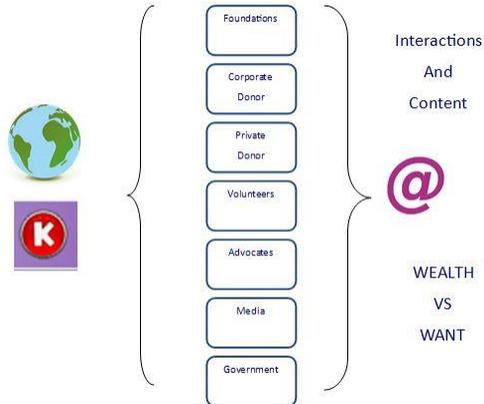# Interactions & Content

Building Wealth

Retaining Organizational History

Managing Interactions & Content

Managing Interactions & Content

Foundations
- Private / public
- Giving Criteria … donor interests
- Proposal Times … quality
- Contact staff
  - Contact positions (quality)
- GrantProposal folder
- gifts / Awards, Declines, Requests
- interactions … Dickens
- Communications – website, pages, document links

Managing Interactions & Content

Corporations / Businesses
- industry segment … quality
- giving criteria … donor interests
- proposal times … quality
- contact staff
  - contact positions (quality)
- DonorCommunications folder
- gifts, sponsorships, gifts in kind
- interactions … Dickens
- Communications – website, pages, document links

Managing Interactions & Content

Private Donors
- achievements, family members, relationships
- business affiliations (senior positions)
- wealth indications
  - Land, business ownership, family, giving history
- donor interests … gift designation
- Qualities and memberships (boards, service clubs)
- DonorCommunications folder
- interactions … Dickens
- gifts, pledges, gifts in kind
- participation with the charity – boards, committees
- Communications … social media, document links

Managing Interactions & Content

Volunteers
- achievements, family members, relationships
- business affiliations (senior positions)
- wealth indications
  - Land, business ownership, family, giving history
- donor interests … gift designation
- qualities and memberships (boards, service clubs)
- Volunteer folder
- gifts, pledges, gifts in kind
- participation with the charity – boards, committees

Managing Interactions & Content

Advocates

- professionals / researchers / medical
- elected officials
- complimentary groups and like charities
- articles – EaseKMS
- Communications – website / blogs

Managing Interactions & Content

Media

- Type of media … newpapers, journals, radio, TV, internet, social media
- Contact positions / people
- interviews – video clips
- articles – EaseKMS
- Interactions … Dickens
- Communications – website / blogs

Managing Interactions & Content

Government
- federal, provincial, municipal
- agencies, funding sources
- contact positions with quality
- funding criteria / submissions
- award history
- Communications … websites / webpages
- Interactions … Dickens

Managing Interactions & Content

Each of these areas has information pertinent to a successful fund development program.

The communications department plays an important role in helping the charity to tell its story.

Not all records will have extensive data. What you will be able to do is determine your best donors / supporters and using the Profile Report and Corporate Contacts Profile report which we spoke about in seminar III view what data is currently housed in your system.

3/01/18

Managing Interactions & Content

1. Productivity is enhanced
2. Organizational history is secured
3. Staff change is not catastrophic
4. You will communicate with donors, funders and supporters with confidence.

The palest ink is better than the best memory!