



# The Researcher as Fundraiser

How to  
Build Relationships,  
Communicate Effectively and  
Manage Your Time  
as a Prospect Researcher

I don't like power point.



# The Agenda

- Rebrand yourself in proactive role
- Step outside your comfort zone
- Build trust
- Effective communication
- Understand your fundraiser's needs

How in the world will we do that?



# the Reference Interview

# The Reference Interview

- Stolen from librarians
- Modified for Advancement
- Easy 5 point program
- Guaranteed to make your work life easier\*

\*"easier" is an estimation

# The Reference Interview

## 5 easy steps

1. Welcoming
2. Gathering information
3. Confirming the question
4. Giving the answer
5. Follow up

# Welcoming



# Be nice!

- People are more willing to forgive mistakes if you are nice to them
- Smile
- Pay attention
- Listen

# Phone and Email etiquette

- People can hear you smiling
- They can also hear you doing other things
- Word your emails carefully
- Avoid jokes and sarcasm until you know them



NBC Universal / W

# Gathering information

note: this is not welcoming

# 6 pieces of evidence

1. Purpose
2. Deadline
3. Type and Amount
4. Who
5. Where
6. Confirm the exact question

# Communication

- Be nice (it always bears repeating)
- Avoid closed-ended questions
- Use open-ended questions
- Use sense-making questions
  - Make sure your questions make sense to them
  - Use their language
  - Avoid overly technical or research-specific terms

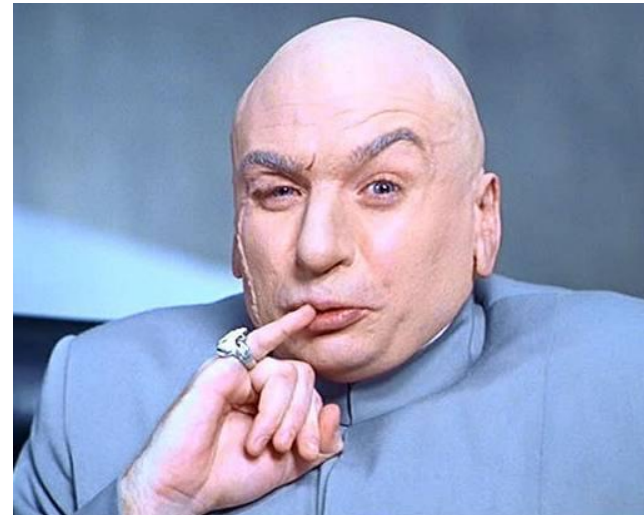
# 6 pieces of evidence



# 6 pieces of evidence

## I. Purpose

- Why is the information needed?
- What do they plan to do with it?
- Avoid accusatory “Why?”



# 6 pieces of evidence

## 2. Deadline

- Meet their needs
- Manage your time
  - If they don't have a deadline, give them one

# 6 pieces of evidence

## 3. Type and Amount of Information

- How much information is needed
  - Corresponds with purpose
- In what form will it be most useful?
  - People process information differently
  - Bulleted list vs. narrative
  - Take another look at your current reports

# 6 pieces of information

## 4. Who

- How knowledgeable is the requesting person on the subject or your shop's procedures?
- Are they data-savvy or data-phobic?
- What information do they already have?

# 6 pieces of information

## 5. Where

- Where did they hear about the subject?
- What prompted the question?
- These answers often lead to more information

# 6 pieces of information

## 6. Confirm the question

- **Same as Reference Interview Step 3**
- Paraphrase and summarize
- Understand what they really want to know
- If you don't understand, ask!
- Restate the deadline

# Give the answer

- Be clear
- Be on deadline



# Follow up

- Builds conversation and trust  
= relationship!



# Challenges

- Difficult personalities
  - Stay calm
  - Learn their communication style
  - Communication style tests do help
    - Myers Briggs
    - 4 Color Personality Test

# Challenges

- It's OK to say "I don't know"
  - But follow up
- It's OK to defer to someone else
  - But make the introduction
- It's OK to deal with it later
  - Give yourself time to absorb and identify questions you have
- It's OK to say "no"
  - But explain why
  - "Because that's policy" is not an explanation

# The Agenda revisited

- Rebrand yourself in proactive role
- Step outside your comfort zone
- Build trust
- Effective communication
- Understand your fundraiser's needs



# Thank you!

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