Unite
Contact Reports

Significant Contact

Significant

A significant contact is a **two-way communication** that meets at least one of the **ONE UTAH** criteria.

Is this contact significant?			
O	Opens a qualification conversation	**U**	Updates to major life events
N	Names important connections	**T**	Ties in a donor's motivations or passions
E	Expands or verifies capacity info	**A**	Advances donor strategy
		H	Highly detailed with outcome and next steps

The only exception is a contact report that summarizes multiple unsuccessful attempts to reach the donor.

> Only significant contact reports will count towards fundraiser performance metrics.

Non-Significant

Non-significant contact includes one-way communication or interactions that do not meet ONE UTAH criteria. Examples include attendance at board meetings or small events, meaningful customer service interactions (student telethon, membership reps, etc.), casual conversations or unplanned social sightings.

> See the **Contact Report Scenarios Guides** for examples by significance and purpose.

Contact Report Content Guidelines

Title

Title	A ten-word or less summary of the interaction.

Body

Fundraiser	Refer to self in third person (e.g. Fawn Drieser met with JR Smith to…).
Abbreviations	Avoid using acronyms or abbreviations that may not be clear to all on campus.
Details	Write the report with a mind to what you, your team, and the broader university community need to know about the interaction. When applicable, be sure to include next steps. Include any and all details that are necessary for institutional memory. Remember: "If it isn't recorded in the system, it didn't happen."

HIPAA

HIPAA	Contact Reports should not needlessly contain constituent health information. However, reports can contain limited protected health information (PHI) when necessary. This might include:
	      Biographic Info: name, address, phone number, age
	      Appointment Details: provider seen, dates, and area
	
	Do NOT include details about treatments, services, diagnoses, or prognoses unless this information has been publicly disclosed (e.g. press release) or constituent gives permission. Be certain to document verbal consent from the donor and/or cite public knowledge.

GRAMA

GRAMA	All contact reports are subject to GRAMA requests; maintain an objective and professional tone and avoid any content that might be embarrassing or offensive.

Contact Report Credit

Related Fundraisers

In order to receive credit for significant contact reports, a fundraiser must be listed as either a lead fundraiser or an assist fundraiser role on the contact report.

Support Staff	When entering a contact report for someone else (e.g. when an assistant completes the form), update the *Fundraiser* field as it will default to the current user.
Team	Fundraisers working together on an interaction should only file one corresponding contact report. Shared credit can be given to all participating partners. Include the Lead Fundraiser and as many Assist Fundraisers as is applicable.
Leadership	Fundraisers may file contact reports on behalf of their campus area leadership, and may receive shared credit for the interaction, even if they did not directly participate.

See the **Constituent/Organization Contact Reports Guides** for instructions on how to add a related fundraiser.

CFR Contact Reports

Fundraisers should **not** file a contact report as part of submitting proposals in response to a centralized call for corporate or foundation proposals. Details of these solicitations will be captured in Unite as CFR Plans, and a member of the CFR team will file a contact report for each plan, giving all submitters credit.