
DEVELOPMENT OFFICER

NEW HIRE TRAINING

UNIVERSITY *of* PUGET SOUND

Est. 1888

DEVELOPMENT OFFICER TRAINING

WELCOME

Congratulations and welcome to University of Puget Sound. During the next 10 days of orientation, our goal is to equip you with the basic skills necessary for you to grow and excel in your new position. Following orientation, you will complete a more in-depth development officer training (DOT) which will be completed over six weeks. At the end of orientation and DO training, we want to ensure that you have the knowledge, skills, drive and inspiration to deliver the message of Puget Sound – and truly understand what it means to be ONE [of a Kind].

OVERVIEW

Training begins with orientation followed by development officer training (DOT). For orientation and DOT, you will receive training support from the following team:

- Director of Capital Giving
- Development Officers (DO)
- Capital Giving Assistants
- Subject Matter Experts (SME)

Orientation

The goal of orientation is for new development officers to be fully functional and knowledgeable of basic job expectations with a strong emphasis on getting to know the university and the campaign, as well as the tools that support this work. During orientation and subsequent weeks following, members of the CPG team and subject matter experts (SMEs) will be assigned to conduct training on key topics.

- **Orientation – Weeks 1 - 2** training provides an initial overview of the “need to know” skills and information necessary for understanding the expectations and responsibilities of your position, as well as a focus on getting to know the university and the campaign.
- **Orientation – Weeks 3 - 4** training provides further training on key functions covered in week 1, as well as a focus on hands-on systems training.

DO Training

Development officer training (DOT) begins immediately after orientation and focuses on the prospect – from portfolio management and prospect tools to prospect visits - as well as ongoing skill development to enhance your ability to engage with Puget Sound constituents. DOT will occur in conjunction with your regular work during these six weeks.

- With the support of the Capital and Planned Giving team (CPG) and SMEs, you will move through five focused training modules, with each module completed in one week. The final week of training will be “your choice” to allow for follow-up and review of any topics or skills of your choice.
 - Millennium & Report Basics
 - Portfolio Management
 - Prospect Visits
 - Basic Capital and Planned Giving (CPG) Operations
 - Planned Giving 101
 - Training Review -- “Free Choice” topics
- DO training should be completed in approximately 6 weeks.

ACCOUNTABILITY

We expect you to take full ownership of all aspects of your training. Your training partners and director will work with you to help you progress through orientation and DO training, schedule key training partners and check to ensure that you are mastering the content and job skills necessary to be successful in your new position. How you benefit from the training is directly linked to the quality of effort that you put into it. You will notice that several activities are repeated multiple times throughout the training with the goal of this repetition being to develop your skills, confidence and proficiency. At the end of your training, we expect you to be confident and knowledgeable in utilizing the tools and resources to know and manage your portfolio, understand the priorities of the ONE [of a kind] campaign, and most importantly provide optimal engagement experiences with your prospects.

Your responsibilities are to:

- Actively participate in your training.
- Invest time to read the content from OUR common, Millennium and the Puget Sound website.
- Locate information and materials referenced and utilize it as you progress through training.
- Provide honest feedback on your training - skills, knowledge and training needs with your training partners and director.

REFERENCE INFORMATION

One of the goals of orientation and DOT is to guide you through the tremendous amount of information available online through OUR common, Millennium and the Puget Sound website. Within each training component, the specific resource information is included for each topic, including the path to access information.

- Our expectation is that you fully read all information referenced in each section, including policies and procedures (P & Ps) and reference content, which are available on OUR Common.
- The P & Ps provide you with the policies and procedures for learning and conducting many business processes – from managing your contact reports to processing a Letter of Intent.
- Getting familiar with the content will help you to always know where to go to find the answer.

TRAINING SCHEDULE

For orientation and DO training, a suggested training timeline will help guide you so you can stay on track and finish your DO new hire training in a timely manner. Training time may vary, depending on your prior experiences, your skill development needs, and the coordination of SMEs who will assist you with your training.

- For orientation, a detailed training schedule is provided for two weeks to cover key topics, but feel free to modify the schedule as needed based on your knowledge and expertise. All training sessions will be scheduled for you according to the training calendar.
- For DOT, a training timeline and list of topics is provided to you, as well as a blank master calendar to help you determine your training schedule by week for each module of DOT. You will be responsible to schedule the training sessions with the SME indicated in your training guide. There is great flexibility in the DO training, but the goal is to cover all components of the training within six weeks.

LET'S GET STARTED

It's time to get started with your training. You will begin with orientation training. Good luck and have fun!

ORIENTATION CALENDAR - OVERVIEW

WEEK 1	ORIENTATION				
	DAY 1: 1/2 (WEDNESDAY)	DAY 2: 1/3 (THURSDAY)	DAY 3: 1/4 (FRIDAY)	DAY 4: 1/7 (MONDAY)	DAY 5: 1/8 (TUESDAY)
	WELCOME TRAINING OVERVIEW OUR/CAPITAL AND PLANNED GIVING DEPT OVERVIEW JOB EXPECTATIONS SYSTEM SET-UP CAMPUS SET-UP NEW HIRE PAPERWORK CAMPAIGN OVERVIEW CAMPUS TOUR INTERNAL COMMUNICATION	CAPITAL AND PLANNED GIVING (CPG) INFO SYSTEM NAVIGATION PUGET SOUND INSIGHT-VIRTUAL TOUR HR TUTORIAL: FERPA (FAMILY EDUCATIONAL RIGHTS & PRIVACY) ATHLETICS & AQUATICS CENTER HIGHLIGHTS CPG DEPARTMENT PLAN-DETAILS	ONE OF A KIND: CAMPAIGN MATERIALS REVIEW CULTIVATION STAGES MILLENNIUM BASICS – BIOGRAPHICAL INFO CAMPAIGN-PRIORITIES OUTLOOK NAVIGATION HR TUTORIAL: PREVENTING SEXUAL HARASSMENT PUGET SOUND INSIGHT-WEYERHAEUSER HALL	E-PROFILE OVERVIEW PROSPECT VISIT – DEMO ASSESSMENT VISIT (DO #1) OUR COMMON NAVIGATION MILLENNIUM INTRO - SYSTEM TRAINING MILLENNIUM BASICS – PROSPECT INFO CONTACT REPORT OVERVIEW	PROSPECT PORTFOLIO DO TERRITORIES CULTIVATION STAGES / INCLINATION VISIT EXPECTATIONS CASCADE NAVIGATION PUGET SOUND INSIGHT REPORTS OVERVIEW MILLENNIUM BASICS - NAVIGATION CAMPAIGN REVIEW WEEKLY TRAINING REVIEW
WEEK 2	ORIENTATION				
	DAY 6: 1/9 (WEDNESDAY)	DAY 7: 1/10 (THURSDAY)	DAY 8: 1/11 (FRIDAY)	DAY 9: 1/14 (MONDAY)	DAY 10: 1/15 (TUESDAY)
	PUGET SOUND WEB & MATERIALS – STUDENT & ACADEMICS PROSPECT STRATEGY – STRATEGY SHEET WEYERHAEUSER HALL – RENDERINGS / TALKING POINTS MILLENNIUM BASICS – TRACKING / GIVING PROSPECT WORKSHEET – FIND BASIC PROSPECT DATA	PROSPECT RESEARCH VISIT PREPARATION NAMED SPACE RESERVATION PROCESS MILLENNIUM - CAL LOG OVERVIEW VISIT COUNTS OVERVIEW PROSPECT VISITS: FREQUENTLY ASKED QUESTIONS – RESOURCE LIST PROSPECT VISIT–DEMO (KURT) ALUMNI CULTIVATION VISIT	PORTFOLIO MANAGEMENT – DO PROSPECT STRATEGY MILLENNIUM BASICS – PROSPECT TAB REPORTS DETAIL – REVIEW KEY DO REPORTS / USAGE PUGET SOUND WEB & MATERIALS-ALUMNI PROSPECT VISIT –PREPARE SAMPLE ASSESSMENT VISIT – ALUMNI FOCUS	OUR COMMON–NAVIGATION ❖ MEETING: CPG DEPARTMENT ❖ MEETING: CPG CONTACT OFFICERS PUGET SOUND MASTER PLAN ❖ MEETING: ANNUAL FUND SOLICITATION STRATEGY FOR CAPITAL PROSPECTS PUGET SOUND WEB & MATERIALS – PARENTS & PRESIDENT’S PAGE	MILLENNIUM –ACTIONS OVERVIEW PROSPECT INITIAL CONTACT – THE PREP E-PROFILE – RUN / REVIEW PROSPECT VISIT –DEMO ASSESSMENT VISIT (DO #2) PROSPECT VISITS: PARENT FAQ – RESOURCE LIST WEEKLY TRAINING REVIEW

ORIENTATION CALENDAR - OVERVIEW

WEEK 3	ORIENTATION				
	DAY 11: 1/16 (WEDNESDAY)	DAY 12: 1/17 (THURSDAY)	DAY 13: 1/18 (FRIDAY)	DAY 13: 1/21 (MONDAY)	DAY 15: 1/22 (TUESDAY)
	<p>ENDOWMENT OVERVIEW</p> <p>PROSPECT VISIT—DEMO (KURT) ALUMNI CULTIVATION VISIT</p> <p>PORTFOLIO MANAGEMENT</p> <p>PROSPECT STRATEGY — STRATEGY SHEET</p> <p>PROSPECT VISIT —PREPARE SAMPLE ASSESSMENT VISIT — ALUMNI FOCUS</p> <p>WEYERHAEUSER HALL — RENDERINGS / TALKING POINTS</p> <p>MILLENNIUM BASICS — ACTIONS TRAINING</p>	<p>CAMPAIGN MATERIALS REVIEW</p> <p>CAMPUS TOUR PREP — PARENT PROSPECT</p> <p>PROSPECT INITIAL CONTACT — THE PREP</p> <p>MILLENNIUM - CAL LOG OVERVIEW</p> <p>VISIT COUNTS OVERVIEW</p> <p>PROSPECT VISITS: FREQUENTLY ASKED QUESTIONS — RESOURCE LIST</p>	<p>PORTFOLIO MANAGEMENT — DO PROSPECT STRATEGY</p> <p>MILLENNIUM BASICS — PROSPECT TAB</p> <p>REPORTS DETAIL — REVIEW KEY DO REPORTS / USAGE</p> <p>E-PROFILE — RUN / REVIEW</p> <p>PUGET SOUND WEB & MATERIALS-ALUMNI</p>	<p>MILLENNIUM —SCREEN DISPLAYS / DEFAULTS / SORTS</p> <p>ACTIONS DEFAULTS</p> <p>OUR COMMON NAVIGATION / KEY FOLDERS</p> <p>ANNUAL FUND COLLABORATIONS / SOLICITATIONS</p>	<p>PROSPECT VISIT —PREPARE ASSESSMENT VISIT — PARENT FOCUS</p> <p>PROSPECT VISIT —MOCK ASSESSMENT VISIT</p> <p>PROSPECT VISITS: PARENT FAQ — RESOURCE LIST</p> <p>WEEKLY TRAINING REVIEW)</p>

WEEK 4	ORIENTATION				
	DAY 16: 2/23 (WEDNESDAY)	DAY 17: 1/24 (THURSDAY)	DAY 18: 1/25 (FRIDAY)	DAY 19: 1/28 (MONDAY)	
	<p>NAMED RESERVATION PROCESS / FORMS</p> <p>GIFT ACCEPTANCE COMMITTEE</p> <p>PORTFOLIO OVERVIEW</p> <p>REPORTS DETAIL — REVIEW KEY DO REPORTS / USAGE</p>	<p>VISIT NOTIFICATION</p> <p>DROPBOX</p> <p>VIRTUAL NETWORK - VPN</p> <p>VISIT COUNTS OVERVIEW</p> <p>PUGET SOUND INFO - PARENTS</p> <p>MILLENNIUM - CAL LOG OVERVIEW</p>	<p>E-PROFILE — RUN / REVIEW</p> <p>PORTFOLIO MANAGEMENT — DO PROSPECT STRATEGY</p> <p>IPAD PRESENTATION PREP</p>	<p>PORTFOLIO MANAGEMENT — DO PROSPECT STRATEGY</p> <p>TRAINING REVIEW AND RECAP</p> <p>NEXT STEPS</p>	

DEVELOPMENT OFFICER TRAINING CALENDAR - OVERVIEW

WEEK 5	DOT: MILLENNIUM & REPORT BASICS				
MILLENNIUM	BUDDY VISIT (WITH DO)				
	MILLENNIUM – CUSTOMIZE DO SCREENS / PREFERENCES: - DISPLAY SCREEN - SET UP SORTS/ FILTERS - DAILY REPORTS PROSPECT INFO – BIOGRAPHICAL / GIVING / ACTIONS / TRACKING	PROSPECT INFO – BASIC DATE / EDUCATION / RELATIONSHIPS CAL LOG (CONTACT ATTEMPT LOG) - OVERVIEW - DEMO	MEETING NOTIFICATION CONTACT REPORT VISIT COUNTS INFO UPDATES	ACTIONS DUE COMPLETED ACTIONS ATTACHING / LINKING DOCUMENTS	PROPOSAL TAB REPORTING – CRITERIA / RUN REPORTS / VIEW REPORTS
REPORTS	REPORT OVERVIEW E-PROFILE PROSPECT STRATEGY WORKSHEET PROSPECTS AND POTENTIALS	CALL LIST MONTHLY (OURIS): DONORS 1K AND 5K PLUS	CONTACT REPORT VISIT COUNTS	ACTIONS DUE REPORT COMPLETED ACTIONS SCHEDULED SOLICITATIONS	DAILY (OUR IS): BIO & PROSPECT UPDATES GIFT AND PLEDGE REPORT WEEKLY: CONSTITUENTS CODED DECEASED RUN REPORTS: EXCEL/PDF
WEEK 6	DOT: PORTFOLIO MANAGEMENT				
	BUDDY VISIT (WITH DO / DIRECTOR – CAMPUS TOUR)				
	PORTFOLIO REVIEW STRATEGY / TOOLS MOCK ALUMNI ASSESSMENT VISIT – PRESENT TO DO	PROSPECT STRATEGY TOP TIER /INCLINATION / CULTIVATION STAGE	TERRITORY MANAGEMENT VISIT STRATEGY /TRAVEL	MOCK PARENT ASSESSMENT VISIT – PRESENT TO DIRECTOR	KEY REPORTS REVIEW ARCHES
WEEK 7	DOT: PROSPECT VISITS				
	DO VISIT – NEW DO PRESENTS (ACCOMPANIED BY DO)				
	PROSPECT PREP – STRATEGY SHEET / CONTACT REPORTS / E-PROFILE VISIT GOAL	VISIT SET-UP PROSPECT CONTACT - PHONE - EMAIL FREQUENTLY ASKED QUESTIONS BY PROSPECTS	CULTIVATION STAGE - ASSESSMENT - CULTIVATION - PRE- SOLICITATION - SOLICITATION - STEWARDSHIP MOCK ALUMNI CULTIVATION VISIT – PRESENT TO DO	THE VISIT – MATERIALS / SCRIPT / QUESTIONS / GOALS JOINT VISITS – PREP / EXPECTATIONS FREQUENTLY ASKED QUESTIONS BY PROSPECTS GREEK SYSTEM	NEXT STEPS – CONTACT REPORT / ACTIONS DUE / THANK YOU / MILLENNIUM WEYERHAEUSER HALL TOUR
















DEVELOPMENT OFFICER TRAINING CALENDAR – OVERVIEW (CONT’D)

WEEK 8	DOT: BASIC OPERATIONS (CPG) & COLLABORATION				
BASIC OPERATIONS	DO VISIT (LOCAL) - SOLO				
	TRAVEL OVERVIEW TRAVEL PROFILE P-CARD PROCESS VPN COMPUTER CONNECTION PUGET SOUND WEBMAIL	CONTACT REPORT PROCESS MOCK ALUMNI STEWARDSHIP VISIT – PRESENT TO DO / PREPARE CONTACT REPORT	MEMORANDUM OF UNDERSTANDING (MOU) PROCESS / TEMPLATE LIBRARY CREATE SAMPLE MOU FOR SCHOLARSHIP MILLE: PROPOSALS TAB	LETTER OF INTENT (LOI) PROCESS / TEMPLATE LIBRARY NAMED SPACE RESERVATION PROCESS: RESERVE A SPACE CREATE SAMPLE LOI FOR FACILITIES PLEDGE MILLE: PROPOSALS TAB	PROPOSALS – WRITTEN & VERBAL / TEMPLATES REVIEW SAMPLE PROPOSALS REVIEW CAMPAIGN PRIORITY DO PROJECTS
COLLABORATION	ANNUAL GIVING OUR-IS	ADMISSION CAMPUS TOUR – LED BY DO	ALUMNI & PARENT RELATIONS	DONOR RELATIONS	CORPORATE & FOUNDATION RELATIONS CES: ASK NETWORK & LOGGNET
WEEK 9	DOT: PLANNED GIVING				
	PLANNED GIVING OVERVIEW CAMPAIGN MATERIALS – LEGACY SOCIETY LEGACY SOCIETY – STAGES MILLENNIUM TRACKING	PLANNED GIVING COMMUNICATION – SOUND ADVICE / I-NEWS PLANNED GIVING BROCHURES	BEQUESTS MOU BEQUEST DEMO DO VISIT: LEGACY SOCIETY / BEQUEST	GIFT ANNUITY PROCESS - OVERVIEW CGA PROPOSAL - PG CALC / SAMPLES INCOME BENEFICIARY	TRUSTS OVERVIEW - CHARITABLE REMAINDER TRUST / CHARITABLE LEAD TRUST MILLENNIUM – PLANNED GIFT TAB
WEEK 10	TRAINING REVIEW - “FREE CHOICE”				
	DO VISIT (LOCAL) - SOLO				
	SYSTEMS	OPERATIONS	OUR / CPG DEPARTMENT	REPORTS	PUGET SOUND
















ORIENTATION

WEEK ONE


























ORIENTATION - WEEK 1: DAY 1

WEDNESDAY: 1/2		DEPARTMENT OVERVIEW /SYSTEM & CAMPUS SET-UP/ CAMPUS TOUR/ CAMPAIGN/ COMMUNICATION
TOPICS	CONTACT / TIME	RESOURCES
Morning		
<input type="checkbox"/> WELCOME & INTRODUCTION <ul style="list-style-type: none"> ● Introductions to department team members ● Office location / Set-up <input type="checkbox"/> UNIVERSITY RELATIONS WALK-THROUGH <ul style="list-style-type: none"> ● High-level OUR building tour (e.g. OUR departments, bathroom, office, copier, etc.) Detailed campus tour will occur later. 	<p>Karen</p> <p>30 min</p>	
<input type="checkbox"/> TRAINING OVERVIEW <ul style="list-style-type: none"> ● DO training overview: Orientation and DO training ● Training Guide ● Objectives / Expectations / Timing / Weekly Training Recap <input type="checkbox"/> OUR / CAPITAL AND PLANNED GIVING DEPARTMENT OVERVIEW <ul style="list-style-type: none"> ● OUR Overview ● Expectations ● Job description: Development Officer / CPG Assistants 	<p>Erin</p> <p>1 hour</p>	<p> DO Training Guide</p> <p> OUR 2013-2015 Plan (CPG p. 137)</p> <p> OUR Structure</p> <p> CPG Assistant Job Duties</p>
<input type="checkbox"/> SYSTEM SET-UP <ul style="list-style-type: none"> ● Computer <ul style="list-style-type: none"> ○ Set-up / Sign-on / Access ○ Personal Network Share Drive ○ Mapping Common Share Drives (OUR common / Vashon) ○ Printer Set-up (BW and color)/ Biz hub / Scan folder ● Cascade (University Internal Network) <ul style="list-style-type: none"> ○ Set-up / Access / Overview ○ Employment Info ○ Staff Financial Account ○ Payroll / Timekeeping ○ Vehicle Registration ○ Directory ● Outlook <ul style="list-style-type: none"> ○ Set-up / Access / Overview: ○ Email: Set up/ Signature / Out of office ○ Messages: Sending/ Receiving ○ Calendar: Scheduling / Meetings / Permissions / OUR ○ Contacts ○ Tasks ● Phone <ul style="list-style-type: none"> ○ Set-up / Access / Overview: ○ Set-up Voice mail message ○ Message Retrieval / Out of office / Forward to cell ● Millennium (Prospect database) <ul style="list-style-type: none"> ○ Set-up / Access / Overview: ○ Moving Around / Prospect Look-up 	<p>Pam</p> <p>2 hours</p>	<p> Tech Services: ext. 8585</p> <p> System Set-up: Self help</p> <p> Cascade Help</p> <p> Employment Information</p> <p> Directions to Staff/Departmental Directories</p>
<input type="checkbox"/> CAMPUS SET-UP <ul style="list-style-type: none"> ● Office / Building keys (Security building) ● ID Card (Need photo – review process / location to obtain card) ● Parking Permit / Vehicle registration (Cascade) ● Mass Notification enrollment (Cascade) ● P-card contract: complete and sign 		<p> Key Issuance Policy</p> <p> Logger ID card</p> <p> Parking Permit</p> <p> Mass Notification enrollment</p> <p> P-Card Info</p> <p> P-Card Application: Complete/Sign</p>
<input type="checkbox"/> LUNCH WITH DOs	<p>Erin & Jean</p> <p>1 hour</p>	



























Week 1 – Day 1 (CONT'D)

TOPICS	TIME	RESOURCES
Afternoon		
<p> NEW HIRE PAPERWORK / HUMAN RESOURCES <i>Review and complete following information:</i></p> <ul style="list-style-type: none"> ● New hire paperwork (verify completion) ● Benefit review / paperwork ● Explore site 	<p>On Your Own</p> <p>30 min</p>	<ul style="list-style-type: none">  New Hire Info  Benefits Enrollment  Employment Information  Sexual Harassment Training
<p> CAMPAIGN OVERVIEW <i>Review following information on your own:</i></p> <ul style="list-style-type: none"> ● Campaign Overview (Campaign plan / website) ● Case statement / campaign materials ● Renderings / photos 	<p>On Your Own</p> <p>1 hour</p>	<ul style="list-style-type: none">  ONE of a Kind Campaign  Campaign Priorities  Campaign News ❖ Case statement & handouts  Athletic & Aquatics Center Renderings
<p> CAMPUS TOUR</p> <ul style="list-style-type: none"> ● Campus tour led by Admission – student led 	<p>Admission</p> <p>1 hour</p>	<p> Campus Map</p>
<p> INTERNAL COMMUNICATION</p> <ul style="list-style-type: none"> ● Director leadership style / Working relationship ● Communication expectations of each other / style ● Meetings: Director(bi-weekly), DO team, other recurring meetings (COT, Strategy meeting) ● Review engagement protocols for the President & Vice President OUR <p> DAILY TRAINING REVIEW</p> <ul style="list-style-type: none"> ● Discussion about the day's training ● Reinforce training expectations and training support ● Next day's schedule 	<p>Kurt</p> <p>30 min</p>	<p> Presidential and vice presidential engagement protocols</p>

ORIENTATION - WEEK 1: DAY 2

THURSDAY: 8/2			CPG PLAN / RESEARCH / SYSTEM NAVIGATION MILLENNIUM / PUGET SOUND INSIGHT		
TOPICS	CONTACT / TIME	RESOURCES			
Morning					
<p> CAPITAL AND PLANNED GIVING DEPARTMENT INFO</p> <p><i>Review the following information:</i></p> <ul style="list-style-type: none"> ● Annual plan ● Campaign website ● Library Key Messages (OUR/Capital Giving) <ul style="list-style-type: none"> ○ Campaign Priority projects ● Job descriptions / CPG Assistants Breakdown 	<p>On Your Own</p> <p>1 hour</p>	<p> OUR 2013-2015 Plan (CPG p. 137)</p> <p> OUR Structure</p> <p> CPG Assistant Job Duties</p> <p> ONE of a Kind Campaign</p> <p> Campaign Priorities</p>			
<p> SYSTEM NAVIGATION</p> <p><i>Log-on, complete actions and explore the following systems to get comfortable navigating:</i></p> <ul style="list-style-type: none"> ● Computer <ul style="list-style-type: none"> ○ Print to both printers ○ Access OUR common – Capital Giving / Planned Giving / OUR ○ Access Vashon ○ Access University of Puget Sound – Save as favorite ● Cascade (University Internal Network) <ul style="list-style-type: none"> ○ View Employment Info ○ Log into Kronos Timekeeping ○ Directory ○ Open Webmail ● Outlook <ul style="list-style-type: none"> ○ Email access – Send / receive emails ○ Calendar – Schedule meeting with CPG assistants (sample) 	<p>On Your Own</p> <p>Pam</p> <p>(assist as needed)</p> <p>1 hour</p>	<p> Tech Services: ext. 8585</p> <p> System Set-up: Self help</p> <p> Cascade Help</p>			
<p> LUNCH WITH PAM</p>	1 hour				
Afternoon					
<p> PUGET SOUND INSIGHT</p> <ul style="list-style-type: none"> ● Puget Sound Website – explore: <ul style="list-style-type: none"> ○ Puget Sound Virtual Tour / Admission / Student / Giving ● Staging area – explore: Financial / Campaign / Academics 	<p>On Your Own</p> <p>30 min</p>	<p> Puget Sound Virtual Tour</p> <p> Admission</p> <p> Student Life</p> <p> Giving: ONE of a Kind Campaign</p>			
<p> HR TUTORIAL: FAMILY EDUCATIONAL RIGHTS AND PRIVACY (FERPA)</p> <p><i>Complete the program</i></p> <ul style="list-style-type: none"> ● FERPA training 	<p>On Your Own</p> <p>15 min</p>	<p> FERPA Tutorial</p>			
<p> ATHLETICS AND AQUATICS CENTER - HIGHLIGHTS</p> <ul style="list-style-type: none"> ● Overview – Campaign goal ● Campaign materials / Photo renderings / explanation - iPad ● Naming opportunities ● Tour of current facility 	<p>Jean</p> <p>1 hour</p>	<p> Athletics and Aquatics Center</p> <p> Athletic and Aquatics Center Renderings</p> <p> Named Space Procedures</p>			
<p> CPG DEPARTMENT PLAN – THE DETAILS</p> <ul style="list-style-type: none"> ● Dive into the CPG plan in detail ● Collaboration – OUR departments 	<p>Kurt</p> <p>1 hour</p>	<p> OUR 2013-2015 Plan (CPG p. 137)</p>			
<p> DAILY TRAINING REVIEW</p> <ul style="list-style-type: none"> ● Discussion about the day's training / Next day's schedule 					

ORIENTATION - WEEK 1: DAY 3

FRIDAY: 8/3			MILLENNIUM BASICS/ CULTIVATION STAGES / CAMPAIGN PRIORITIES / OUTLOOK / HR TUTORIAL
TOPICS	CONTACT / TIME	RESOURCES	
Morning			
<p> CAMPAIGN MATERIALS REVIEW <i>Read all campaign materials and understand campaign priorities:</i></p> <ul style="list-style-type: none"> ● Campaign Materials: <ul style="list-style-type: none"> ○ Case statement ○ Financial Aid handout ○ Faculty Support handout ○ Student Engagement handout ○ Athletics and Aquatics handout ○ Legacy Society ● Priorities <ul style="list-style-type: none"> ○ Endowment / Facilities / Annual Giving 	<p>On Your Own 1 hour</p>	<ul style="list-style-type: none">  ONE of a Kind Campaign  Campaign Priorities  Campaign News ❖ Case statement & handouts  Campaign Priorities - DO Projects  Athletic and Aquatics Center Renderings 	
<p> CULTIVATION STAGES</p> <ul style="list-style-type: none"> ● Capital prospect designation – overview of requirements ● Cultivation stages – review each stage / movement between stages / movement criteria <ul style="list-style-type: none"> ○ Assessment ○ Cultivation ○ Pre-Solicitation ○ Solicitation ○ Stewardship ● Prospect list: Locate cultivation stage for each prospect (Mille) 	<p>Erin 1 hour</p>	<ul style="list-style-type: none">  Prospect Tracking Codes  Prospect Tracking Chart 	
<p> MILLENNIUM BASICS – BIOGRAPHICAL TAB <i>Use prospect list to locate the following for each prospect:</i></p> <ul style="list-style-type: none"> ● Address ● Basic data ● Correspondence ● Employment ● Education ● Relations 	<p>On Your Own 1 hour</p>	<ul style="list-style-type: none">  Millennium P & P  Basic Data Attributes - Quick reference 	
Afternoon			
<p> CAMPAIGN PRIORITIES</p> <ul style="list-style-type: none"> ● Campaign status ● Case statement, campaign materials – review ● Campaign priorities 	<p>Kurt 1 hour</p>	<ul style="list-style-type: none">  Campaign Priorities  Endowment  Facilities ❖ Case statement & handouts 	
<p> PUGET SOUND INSIGHT <i>Explore the materials in Library/ Key Messages and popular website links</i></p> <ul style="list-style-type: none"> ● Explore! ● Favorite acronyms at Puget Sound / Popular website links 	<p>On Your Own 1 hour</p>	<ul style="list-style-type: none">  Library - Key Messages  Puget Sound Acronyms  Popular Website Links 	
<p> OUTLOOK NAVIGATION <i>Spend time navigating through Outlook functions:</i></p> <ul style="list-style-type: none"> ● Email: send / receive / signature ● Calendar: schedule meeting / accept meeting / permissions / color code categories / View CPG calendars ● Contacts: OUR lists / key contacts ● Tasks: set-up / usage 	<p>On Your Own 1 hour</p>	<ul style="list-style-type: none">  Tech Services: #8585  Outlook Guide  Directions to Staff/Departmental Directories 	
<p> HR TUTORIAL: PREVENTING SEXUAL HARASSMENT <i>Complete the program, print a certificate and send to HR.</i></p> <ul style="list-style-type: none"> ● Preventing Sexual Harassment Training 	<p>On Your Own 1 hour</p>	<ul style="list-style-type: none">  Preventing Sexual Harassment Tutorial 	

CHECK YOUR KNOWLEDGE

A few facts...

- ❖ Puget Sound was founded in 1888
- ❖ 2600 students from 49 states, 14 countries, 76% from outside of WA state
- ❖ Student-faculty ratio: 12 to 1
- ❖ Puget Sound's Mascot is a "Logger"
- ❖ 23 varsity sports, NCAA Division III NW conference
- ❖ Campaign goal is \$125 million

Places to go ... WHEELLOCK



- ❖ Also known as the SUB (student union building)
- ❖ Includes Dining Hall, Diversions café (coffee!), dining and conference services (ID card), mailroom, bookstore
- ❖ Bookstore for Puget Sound gear, cards, snacks, books, etc.
- ❖ Meeting rooms - Murray Boardroom / Wheelock 101

















Do you know ...

- ❖ The name of our campaign?
- ❖ Three campaign priorities?
- ❖ Total to date for the campaign?
- ❖ The six departments of University Relations?
- ❖ Where to find a prospect's phone number in Millennium?
- ❖ What OUR common is?
- ❖ Where to find a prospect's TPC?
- ❖ The location of Collins Memorial Library?





























Acronyms ...

- ❖ OUR - Office of University Relations
- ❖ DO - Development Officer
- ❖ CPG - Capital and Planned Giving
- ❖ APR - Alumni and Parent Relations

ORIENTATION - WEEK 1: DAY 4

MONDAY: 8/6			EPROFILE / DEMO PROSPECT VISIT / OUR COMMON MILLENNIUM INTRO / CONTACT REPORTS
TOPICS	CONTACT / TIME	RESOURCES	
Morning			
<p> E-PROFILE OVERVIEW</p> <p><i>Use prospect eProfiles as reference:</i></p> <ul style="list-style-type: none"> ● Review components of eProfile ● Look at 3-4 eProfiles from prospect list / Review key sections for prospect calls or visits ● Run eProfile on Millennium – Quick eProfile 	<p>Erin</p> <p>1 hour</p>	<ul style="list-style-type: none"> ❖ Sample eProfile  E-Profile - How To 	
<p> PROSPECT VISIT–DEMO ASSESSMENT VISIT BY DO #1</p> <ul style="list-style-type: none"> ● Prospect Visit demo – DO use iPad / Campaign materials ● Alumni visit focus ● Utilize campus map / cover campaign priorities/renderings 	<p>Erin</p> <p>1 hour</p>	<ul style="list-style-type: none">  Puget Sound Virtual Tour  Campaign Priorities  Endowment  Facilities  Campus Master Plan 	
Afternoon			
<p> MILLENNIUM – INTRO TRAINING</p> <ul style="list-style-type: none"> ● Access ● The Basics: Biographical, giving, prospect 	<p>Anne Smith</p> <p>1 hour</p>	<ul style="list-style-type: none">  Millennium P & P 	
<p> MILLENNIUM BASICS – PROSPECT TAB</p> <p><i>Use prospect list to locate and explore the following:</i></p> <ul style="list-style-type: none"> ● Actions ● Media ● Tracking 	<p>On Your Own</p> <p>30 min</p>	<ul style="list-style-type: none">  Millennium P & P 	
<p> CONTACT REPORTS – OVERVIEW</p> <p><i>Use sample contact report from prospect list.</i></p> <ul style="list-style-type: none"> ● Contact Report Overview – Purpose / Timing / Location ● Review Contact Report process sheet ● Key components – Sample contact report / Template ● Action items / relationships ● Millennium – Actions tab / Find 2-3 contact reports in Actions ● eProfile link – 2-4 CR executive summaries 	<p>Pam</p> <p>1 hour</p>	<ul style="list-style-type: none">  Contact Report Process  CR Template 	
<p> DAILY TRAINING REVIEW</p> <ul style="list-style-type: none"> ● Review answers to “Check your Knowledge” sheet ● Training to date - recap ● Next day’s schedule 	<p>Kurt</p> <p>30 min</p>		

ORIENTATION - WEEK 1: DAY 5

TUESDAY: 8/7			PROSPECT PORTFOLIO / CULTIVATION STAGES / VISITS / CASCADE / REPORTS / CAMPAIGN		
TOPICS	CONTACT / TIME	RESOURCES			
Morning					
<ul style="list-style-type: none">  PROSPECT PORTFOLIO <ul style="list-style-type: none"> ● Overview ● Research - Prospect identification ● Portfolio make-up  DO TERRITORIES <ul style="list-style-type: none"> ● DO territory overview ● Local prospects  CULTIVATION STAGES / INCLINATION <ul style="list-style-type: none"> ● Prospect stages / inclination – overview ● Movement from one stage – criteria / process ● Notification of move – contact report / Katie's role  VISIT EXPECTATIONS <ul style="list-style-type: none"> ● Prospect visits – high level overview / Visit expectations 	Kurt 2 hours	<ul style="list-style-type: none">  Prospect Tracking Codes  Prospect Tracking Chart 			
<ul style="list-style-type: none">  CASCADE NAVIGATION <i>Spend time navigating through Cascade functions:</i> <ul style="list-style-type: none"> ● Login / access ● Employment info ● Kronos timekeeping 	On Your Own 30 min	<ul style="list-style-type: none">  Tech Services: #8585  System Set-up: Self help  Cascade Help  Cascade - Employment Info  Kronos - FAQ 			
<ul style="list-style-type: none">  PUGET SOUND INSIGHT <ul style="list-style-type: none"> ● Puget Sound Website – explore: <ul style="list-style-type: none"> ○ About the university /Academics / Student Life / Greek life ○ Weyerhaeuser Hall ● Arches – Ron's letters 	On Your Own 30 min	<ul style="list-style-type: none">  Student-life  Academics  Weyerhaeuser Hall  Arches Magazine  Greek info 			
Afternoon					
<ul style="list-style-type: none">  REPORTS OVERVIEW <ul style="list-style-type: none"> ● Report Summary – Key reports / type / purpose ● Frequently used reports ● Sample reports 	Pam 1 hour	<ul style="list-style-type: none">  CPG-OUR Reports Inventory 			
<ul style="list-style-type: none">  MILLENNIUM BASICS – NAVIGATION <i>Use prospect list to locate the following for 3-4 prospects:</i> <ul style="list-style-type: none"> ● Millennium ID # ● Affiliation (alum, parent, friend) ● Giving history – past 3 years ● TPC ● Cultivation stage ● Most recent contact report ● 1-2 relationships ● Actions due ● Run eProfile 	On Your Own 1 hour	<ul style="list-style-type: none">  Millennium P & P 			
<ul style="list-style-type: none">  CAMPAIGN REVIEW <ul style="list-style-type: none"> ● Case statement. campaign materials, website, proposals – review ● Proposal Library – read several recent proposals ● Campus master plan ● Building photos / renderings 	On Your Own 1 hour	<ul style="list-style-type: none">  Proposal Library  Campus Master Plan  Puget Sound Virtual Tour  Case statement & handouts 			
<ul style="list-style-type: none">  WEEKLY REVIEW <ul style="list-style-type: none"> ● Review training successes / opportunities ● Complete training checklist / Review next week's schedule 	Kurt 30 min				

CHECK YOUR KNOWLEDGE

A few facts...

- ❖ Campaign goal for endowment is \$63 million
- ❖ Campaign goal for facilities is \$35.5 million
- ❖ Passages, Prelude and Perspectives is the name of the freshmen orientation program



Places to go ... COLLINS MEMORIAL LIBRARY

- ❖ Collins Memorial Library was named for former trustee Everill S. Collins
- ❖ During the school year the library is open 116.5 hours a week
- ❖ Borrowing is free to staff, faculty and students. Over 400,000 books with 5,500 added annually
- ❖ Technology Services is located in the basement of the library
- ❖ Meeting rooms - Misner (Main floor, room 127), McCormick (3rd floor, room 303), Shelmidine (2nd floor)

Do you know ...

- ❖ The campaign goal for the Athletics and Aquatics center?
- ❖ How to find the year an alum graduated?
- ❖ Three key items from an eProfile?
- ❖ The purpose of the Legacy Society?
- ❖ Where to find a prospect's cell phone number?
- ❖ The name of our timekeeping system?
- ❖ What Cascade is used for?
- ❖ What classes are held in Weyerhaeuser Hall?

Acronyms ...

- ❖ Mille - Millennium database
- ❖ TPC - Total philanthropic capacity
- ❖ CR - Contact Report
- ❖ LOI - Letter of Intent
- ❖ UPS - NEVER use UPS; now use Puget Sound









TRAINING REVIEW: ORIENTATION WEEK ONE

Topic	Status		Follow-up
	Completed	Additional Training	
DEPARTMENT / JOB EXPECTATIONS			
OUR OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CAPITAL AND PLANNED GIVING (CPG) OVERVIEW / DETAILS	<input type="checkbox"/>	<input type="checkbox"/>	
JOB EXPECTATIONS	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN PRIORITIES	<input type="checkbox"/>	<input type="checkbox"/>	
INTERNAL COMMUNICATION	<input type="checkbox"/>	<input type="checkbox"/>	
SYSTEM / CAMPUS SET-UP			
SYSTEM SET-UP (CASCADE, MILLENNIUM, OUTLOOK, PHONE)	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPUS SET-UP (KEYS, ID CARD, PARKING PERMIT)	<input type="checkbox"/>	<input type="checkbox"/>	
HR INFO(PAPERWORK, HR TUTORIALS—FERPA/SEXUAL HARASSMENT)	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPUS TOUR	<input type="checkbox"/>	<input type="checkbox"/>	
PUGET SOUND INSIGHT			
PUGET SOUND INFO	<input type="checkbox"/>	<input type="checkbox"/>	
ONE OF A KIND CAMPAIGN: PRIORITIES / STATUS	<input type="checkbox"/>	<input type="checkbox"/>	
ATHLETICS & AQUATICS CENTER / WEYERHAEUSER HALL	<input type="checkbox"/>	<input type="checkbox"/>	
SYSTEM NAVIGATION			
MILLENNIUM BASICS:	<input type="checkbox"/>	<input type="checkbox"/>	
- BIOGRAPHICAL SECTION			
- PROSPECT SECTION			
- GIVING SECTION			
MILLENNIUM NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
OUTLOOK NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
CASCADE NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
OUR COMMON NAVIGATION – CAPITAL GIVING / PLANNED GIVING	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT PORTFOLIO			
PROSPECT PORTFOLIO	<input type="checkbox"/>	<input type="checkbox"/>	
DO TERRITORIES	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT TPC	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT CULTIVATION STAGE / INCLINATION / GIVING HISTORY	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT VISITS			
CULTIVATION STAGES (TRACKING)	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT RESEARCH	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT VISIT –MOCK VISITS / PARENTS & ALUMNI	<input type="checkbox"/>	<input type="checkbox"/>	
CPG SUPPORT TOOLS			
REPORTS OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
E-PROFILE OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CONTACT REPORTS OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
PROPOSAL LIBRARY	<input type="checkbox"/>	<input type="checkbox"/>	
LIBRARY / KEY MESSAGES (OUR COMMON / CAPITAL GIVING)	<input type="checkbox"/>	<input type="checkbox"/>	








ORIENTATION

WEEK TWO













ORIENTATION - WEEK 2: DAY 6

WEDNESDAY: 8/8			PORTFOLIO MANAGEMENT / PROSPECT STRATEGY / WEYERHAEUSER HALL / MILLENNIUM
TOPICS	CONTACT / TIME	RESOURCES	
Morning			
<input type="checkbox"/> PUGET SOUND INFO – STUDENT & ACADEMICS <ul style="list-style-type: none"> ● Explore Puget Sound website with focus on Admission section ● Review info on students / academics with focus on freshmen ● Review admission packet / 2016 student profile 	On Your Own 1 hour	 Admission  Freshmen  Student-life  Academics	
<input type="checkbox"/> WEYERHAEUSER HALL <ul style="list-style-type: none"> ● Overview ● Key talking points ● Photos ● Tour of Weyerhaeuser Hall – OT/PT space 	Erin 1.5 hours (includes tour of Weyerhaeuser)	 Weyerhaeuser Hall  Weyerhaeuser Hall news release	
Afternoon			
<input type="checkbox"/> PROSPECT STRATEGY <i>Use prospect list to pull Strategy Sheets</i> <ul style="list-style-type: none"> ● Strategy Sheet Overview ● Purpose ● Key components – review prospect strategy sheet ● How to use ● Portfolio - identification of key prospects for strategy sheets 	Erin 1 hour	 Prospect Strategy Sheet	
<input type="checkbox"/> MILLENNIUM BASICS –PROSPECT (TRACKING) / GIVING TAB <i>Use prospect list to locate the following:</i> <ul style="list-style-type: none"> ● Giving history for prior 3 year ● Designation of most recent gift ● TPC ● Cultivation stage ● Most recent action 	On Your Own 1 hour	 Millennium P & P	
<input type="checkbox"/> QUESTIONS <ul style="list-style-type: none"> ● Review questions with Kurt 	Kurt 1 hour		

ORIENTATION - WEEK 2: DAY 7

THURSDAY: 8/9			PROSPECT VISIT / PROSPECT STRATEGY / CAL LOG / VISIT COUNTS / DEMO VISIT / PROSPECT FAQ
TOPICS	CONTACT / TIME	RESOURCES	
Morning			
<input type="checkbox"/> RESEARCH ORIENTATION <ul style="list-style-type: none"> ● Research Overview ● Prospect identification / TPC determination ● Media 	Cecilia / Hannah 1 hour	<ul style="list-style-type: none">  Intro to Research  Intro-New Development Officers  Research P&P 	
<input type="checkbox"/> PUGET SOUND INSIGHT (from Day 3 - 8/3) <i>Explore the materials in Library/ Key Messages and popular website links</i> <ul style="list-style-type: none"> ● Explore! ● Favorite acronyms at Puget Sound / Popular website links 	On Your Own 1 hour	<ul style="list-style-type: none">  Library - Key Messages  Puget Sound Acronyms  Popular Website Links 	
Afternoon			
<input type="checkbox"/> NAMED SPACE RESERVATION PROCESS <ul style="list-style-type: none"> ● Review process ● Hold Log / Reservation 	On Your Own 1 hour		
<input type="checkbox"/> PROSPECT VISITS: FREQUENTLY ASKED QUESTIONS <ul style="list-style-type: none"> ● Review FAQ resource list ● Questions asked by prospects – not fundraising related 	On Your Own 1 hour	<ul style="list-style-type: none">  Prospects FAQ for non-fundraising topics 	

ORIENTATION - WEEK 2: Day 8

FRIDAY: 8/10		ENDOWMENT / PORTFOLIO MANAGEMENT / REPORTS / ASSESSMENT VISIT PREP
TOPICS	CONTACT / TIME	RESOURCES
Morning		
<input type="checkbox"/> MILLENNIUM PRACTICE – PROSPECT TAB <i>Use prospect eProfiles as reference:</i> <ul style="list-style-type: none"> ● Actions (contact reports, CAL log, actions, last visit) ● Media ● Planned Gift ● Proposals ● Tracking (TPC, Cultivation stage) 	On Your Own 1 hour	 Millennium P & P
<input type="checkbox"/> PUGET SOUND INFO – ALUMNI <ul style="list-style-type: none"> ● Explore Puget Sound website with focus on alumni sections ● Read alumni campaign materials (Annual Giving, Alumni & Parent Relations, Arches) ● Review volunteer opportunities for alumni (staging area) 	On Your Own 1 hour	 About our Alumni  Alumni Council  Volunteer Opportunities  Arches Magazine
Afternoon		
<input type="checkbox"/> HR TUTORIAL: FAMILY EDUCATIONAL RIGHTS AND PRIVACY (FERPA) (from 8/2 - Day 2) Complete the program <ul style="list-style-type: none"> ● FERPA training 	On Your Own 15 min	 FERPA Tutorial
<input type="checkbox"/> HR TUTORIAL: PREVENTING SEXUAL HARASSMENT (from 8/3 - Day 3) Complete the program, print a certificate and send to HR <ul style="list-style-type: none"> ● Preventing Sexual Harassment Training 	On Your Own 1 hour	 Preventing Sexual Harassment Tutorial
<input type="checkbox"/> CAMPAIGN OVERVIEW (from Day 1) Review following information on your own: <ul style="list-style-type: none"> ● Campaign Overview (Campaign plan / website) ● Case statement / campaign materials ● Renderings / photos 	On Your Own 1 hour	 ONE of a Kind Campaign  Campaign Priorities  Campaign News  Case statement & handouts  Athletic and Aquatics Center Renderings

CHECK YOUR KNOWLEDGE

A few facts...

- ❖ Over 1200 courses are offered
- ❖ 97 acre campus
- ❖ Puget Sound has three fraternities and four sororities.
- ❖ Varsity sports includes 11 men's and 12 women's team. Loggers have captured 40 NW Conference Championships since 1999.
- ❖ "Sound Past" is Puget Sound's archive of photos



Places to go ... WEYERHAEUSER Hall

- ❖ Our newest building on campus completed in Fall 2011.
- ❖ Weyerhaeuser Hall was named for trustee Bill Weyerhaeuser and his wife, Gail
- ❖ The 42,500-sf building houses graduate programs in physical therapy and occupational therapy, as well as undergraduate programs in exercise science, psychology and neuroscience.









Do you know ...

- ❖ Your visit count goal for the year?
- ❖ Minimum amount to create a restricted endowment?
- ❖ The location of Misner meeting room?
- ❖ Where to find an alum's major in millennium?
- ❖ Three key features of the athletics center?
- ❖ Three key features of the aquatics center?
- ❖ How to find the most recent contact report for a prospect?
















Acronyms ...

- ❖ CAL- Contact attempt log
- ❖ DR - Donor Relations
- ❖ PG - Planned Giving
- ❖ OURIS - University relations information services department

ORIENTATION - WEEK 2: DAY 9

MONDAY: 8/13		CPG DEPT MEETING / VIRTUAL TOUR & MASTER PLAN / OUR COMMON / DROPBOX / NAMED SPACES	
TOPICS	CONTACT / TIME	RESOURCES	
Morning			
<input type="checkbox"/> CPG DEPARTMENT MEETING	10:00 – 11:00 am 1 hour		
<input type="checkbox"/> CPG CONTACT OFFICERS MEETING	11:00 – 12:00 pm 1 hour		
Afternoon			
<input type="checkbox"/> OUR COMMON NAVIGATION <ul style="list-style-type: none"> ● Navigation ● Key folders – Capital Giving / Planned Giving / Donor Relations / OUR / Research / Alumni & Parent Relations <input type="checkbox"/> DROPBOX <ul style="list-style-type: none"> ● Shared Folders – Photos / map ● Personal Folders – Travel <input type="checkbox"/> MISCELLANEOUS <ul style="list-style-type: none"> ● Named Reservation Process Overview ● Other topics / Questions 	Karen 45 min	<ul style="list-style-type: none">  OUR common - Capital Giving  OUR common - Planned Giving 	
<input type="checkbox"/> PUGET SOUND MASTER PLAN / VIRTUAL TOUR <ul style="list-style-type: none"> ● Interactive website map ● Explore map / integration to visits ● New residence hall 	On Your Own 1 hour	<ul style="list-style-type: none">  Campus Master Plan  Puget Sound Virtual Tour  New Residence Hall  Athletics and Aquatics Center  Weyerhaeuser Hall  Commencement Walk 	

ORIENTATION - WEEK 2: DAY 10

TUESDAY: 8/14		PROSPECT VISIT PREP / CAL LOG PARENT INFO / DEMO PROSPECT VISIT / PROSPECT FAQ	
TOPICS	CONTACT / TIME	RESOURCES	
Morning			
<input type="checkbox"/> PROSPECT VISITS - INITIAL CONTACT <ul style="list-style-type: none"> ● Overview ● Phone / email – Planning and prep / # attempts ● Meeting goals–Strategy sheet ● Best practices / sample script ● Contact strategy – am/pm ● Meeting locations ● Anchor visit – travel ● Reports: Prospects and Potentials ● Millennium: Call List / CAL log (contact attempt log) <input type="checkbox"/> VISIT PREPARATION <ul style="list-style-type: none"> ● Overview ● Meeting goals–Strategy sheet ● eProfile / Contact reports ● Campaign materials ● DO collaboration ● Meeting Notification ● Travel prep (if needed) ● iPad prep – Photos / Renderings (if applicable) 	<p>Erin</p> <p>1 hour</p>	<ul style="list-style-type: none">  Prospect Strategy Sheet  Meeting Notification Template 	
<input type="checkbox"/> MILLENNIUM TRAINING – CAL LOG <i>Use prospect eProfiles as reference:</i> <ul style="list-style-type: none"> ● Process review ● Actions tab ● Reports / Tracking 	<p>Erin</p> <p>30 min</p>	<ul style="list-style-type: none">  Contact Attempt Log (CALL System) 	
Afternoon			
<input type="checkbox"/> PUGET SOUND INFO – PARENTS <ul style="list-style-type: none"> ● Explore Puget Sound website with focus on parent sections ● Arches - President’s Letters ● Frequently asked questions from prospect visits (non-fundraising related) 	<p>On Your Own</p> <p>1 hour</p>	<ul style="list-style-type: none">  Parents  Parents Council  Arches Magazine  Prospects FAQ 	
<input type="checkbox"/> PROSPECT VISIT– DEMO ASSESSMENT VISIT BY DO #2 <ul style="list-style-type: none"> ● Prospect Visit demo – DO use iPad / Campaign materials ● Alumni visit focus ● Focus on campus update / Campaign update / Athletics & Aquatics Center <input type="checkbox"/> PROSPECT VISIT FAQ – RESOURCE LIST <ul style="list-style-type: none"> ● Review questions / resources / Connect parents to resources 	<p>Jean</p> <p>1 hour</p>	<ul style="list-style-type: none">  Puget Sound Virtual Tour  New Residence Hall  Athletics and Aquatics Center  Weyerhaeuser Hall  Commencement Walk  Campus Master Plan  Prospects FAQ  Case statement & handouts 	

















TRAINING REVIEW: ORIENTATION WEEK TWO

Topic	Status		Follow-up
	Completed	Additional Training	
PORTOFOLIO			
VISIT STRATEGY: TPC / LOCATION / RATINGS	<input type="checkbox"/>	<input type="checkbox"/>	
TOP TIER / INCLINATION	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT STRATEGY – STRATEGY SHEET	<input type="checkbox"/>	<input type="checkbox"/>	
IDENTIFICATION OF KEY PROSPECTS	<input type="checkbox"/>	<input type="checkbox"/>	
TOOLS / REPORTS: MANAGEMENT OF PORTFOLIO	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT VISITS			
INITIAL CONTACT / BEST PRACTICES	<input type="checkbox"/>	<input type="checkbox"/>	
CAL LOG	<input type="checkbox"/>	<input type="checkbox"/>	
VISIT PREP – STRATEGY SHEETS / E-PROFILE/CONTACT REPORTS	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN MATERIALS / CAMPUS MAP / VIRTUAL MAP	<input type="checkbox"/>	<input type="checkbox"/>	
DEMO VISITS (BY DO/DIRECTOR)	<input type="checkbox"/>	<input type="checkbox"/>	
DEVELOP VISIT PRESENTATION – ALUMNI/PARENT	<input type="checkbox"/>	<input type="checkbox"/>	
DEMO CAMPUS TOUR IPAD	<input type="checkbox"/>	<input type="checkbox"/>	
INTRODUCTION / SET-UP / TOOL WITH PROSPECTS	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN			
CAMPAIGN PRIORITIES	<input type="checkbox"/>	<input type="checkbox"/>	
ENDOWMENT	<input type="checkbox"/>	<input type="checkbox"/>	
FACILITIES – WEYERHAEUSER / ATHLETICS AND AQUATICS CENTER	<input type="checkbox"/>	<input type="checkbox"/>	
VIRTUAL TOUR / CAMPUS MAP	<input type="checkbox"/>	<input type="checkbox"/>	
PUGET SOUND INSIGHT			
ALUMNI	<input type="checkbox"/>	<input type="checkbox"/>	
PARENTS	<input type="checkbox"/>	<input type="checkbox"/>	
STUDENTS / ACADEMICS	<input type="checkbox"/>	<input type="checkbox"/>	
SYSTEM NAVIGATION			
MILLENNIUM BASICS:	<input type="checkbox"/>	<input type="checkbox"/>	
- BIOGRAPHICAL SECTION			
- PROSPECT SECTION			
- ACTIONS SECTION			
MILLENNIUM NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
OUTLOOK NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
CASCADE NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
OUR COMMON NAVIGATION – CAPITAL GIVING / PLANNED GIVING	<input type="checkbox"/>	<input type="checkbox"/>	
CPG SUPPORT TOOLS			
REPORTS OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
E-PROFILE OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CONTACT REPORTS OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
NAMED SPACE RESERVATION PROCESS	<input type="checkbox"/>	<input type="checkbox"/>	












ORIENTATION

WEEK THREE












ORIENTATION - WEEK 3: DAY 11

WEDNESDAY: 8/15		ENDOWMENT / PROSPECT VISIT DEMO / VISIT PREP/ MILLENNIUM ACTIONS
TOPICS	CONTACT / TIME	RESOURCES
<input type="checkbox"/> ENDOWMENT OVERVIEW <ul style="list-style-type: none"> ● Overview ● Types of endowment (scholarships / funds) ● Campaign materials ● Minimum levels ● Sample endowments (scholarships / funds) 	Kurt 2 hourS	 Endowment  Case statement & handouts
<input type="checkbox"/> PROSPECT VISIT– DEMO CULTIVATION VISIT BY CPG DIRECTOR <ul style="list-style-type: none"> ● Prospect Visit demo – use iPad / campaign materials ● Alumni visit focus- Cultivation stage ● Focus on campus update / Campaign update / Athletics & Aquatics Center ● Discuss shadow visit with Kurt 		 Puget Sound Virtual Tour  Campus Master Plan  Case statement & handouts
<input type="checkbox"/> WEEKLY TRAINING REVIEW / QUESTIONS <ul style="list-style-type: none"> ● Review answers to “Check your Knowledge” sheet ● Training to date – recap ● Questions 		
Afternoon		
<input type="checkbox"/> PROSPECT VISIT–ASSESSMENT PREPARATION - ALUMNI <ul style="list-style-type: none"> ● Prepare for Assessment prospect visit - think about how you want your visit to look/feel ● Review content ● Alumni visit focus ● Utilize campus map / cover campaign priorities 	On Your Own 1 hour	 Puget Sound Virtual Tour  New Residence Hall  Athletics and Aquatics Center  Weyerhaeuser Hall  Commencement Walk  Campus Master Plan  Prospects FAQ  Case statement & handouts
<input type="checkbox"/> MILLENNIUM TRAINING – ACTIONS <i>Use prospect eProfiles as reference:</i> <ul style="list-style-type: none"> ● Overview ● Actions navigation ● Key actions ● Create actions ● Create CAL actions ● Contact report actions ● Reports: Actions Due / Actions completed 	Erin 1 hour	 Millennium P & P  Actions Due Report  Contact Attempt Log (CAL System)

ORIENTATION - WEEK 3: DAY 12

THURSDAY: 8/16		CAMPAIGN MATERIALS / CAMPUS TOUR PREP REGIONAL CAMPAIGNS
TOPICS	CONTACT / TIME	RESOURCES
<input type="checkbox"/> PHOTO WITH ROSS Photo for OUR website	Ross 30 min	
<input type="checkbox"/> CAMPAIGN MATERIALS REVIEW Read all campaign materials and understand campaign priorities: <ul style="list-style-type: none"> ● Campaign Materials: <ul style="list-style-type: none"> ○ Case statement ○ Financial Aid handout ○ Faculty Support handout ○ Student Engagement handout ○ Athletics and Aquatics handout ○ Legacy Society ● Priorities <ul style="list-style-type: none"> ○ Endowment / Facilities / Annual Giving 	On Your Own 1 hour	<ul style="list-style-type: none">  ONE of a Kind Campaign  Campaign Priorities  Campaign News  Campaign Priorities - DO Projects  Athletic and Aquatics Center Renderings  Weyerhaeuser Photos ❖ Case statement & handouts
<input type="checkbox"/> CAMPUS TOUR PREP – PARENT PROSPECT <ul style="list-style-type: none"> ● Prepare for on-campus parent visit and tour ● Review content / talking points ● Parent visit focus ● Utilize campus map / cover campaign priorities ● Plan campus tour 	On Your Own 1 hour	<ul style="list-style-type: none">  Campus Tour Notes  New Residence Hall  Athletics and Aquatics Center  Weyerhaeuser Hall  Commencement Walk
Afternoon		
<input type="checkbox"/> BUILDING BETTER REUNIONS <ul style="list-style-type: none"> ● APR meeting 	1:30 – 3:00 pm 90 min	
<input type="checkbox"/> REGIONAL PLANNING – DENVER / SF <ul style="list-style-type: none"> ● DR meeting 	3:00 – 4:30 pm 90 min	

ORIENTATION - WEEK 3: DAY 13

FRIDAY: 8/17 PUGET SOUND INSIGHT / DEMO CAMPUS TOUR / ORIENTATION WRAP-UP		
TOPICS	CONTACT / TIME	RESOURCES
<input type="checkbox"/> DEMO CAMPUS TOUR – PARENT PROSPECT VISIT <ul style="list-style-type: none"> ● Demo campus tour – Take Karen (acting as parent prospect) on a campus tour ● Parent visit focus ● Utilize campus map ● Highlight campaign priorities 	Karen 2 hours	<ul style="list-style-type: none">  Parents  Parents Council  Puget Sound Virtual Tour  Campus Master Plan  Campus Tour Notes  Athletic and Aquatics Center Renderings  Case statement & handouts
<input type="checkbox"/> PUGET SOUND INSIGHT <i>Explore the materials in Library/ Key Messages and popular website links</i> <ul style="list-style-type: none"> ● Explore! ● Current articles in Library – Key Messages ● Frequently Asked Prospect Questions ● Favorite acronyms at Puget Sound / Popular website links 	On Your Own 1 hour	<ul style="list-style-type: none">  Library - Key Messages  Prospects FAQ  Puget Sound Acronyms  Popular Website Links
<input type="checkbox"/> WEEKLY UPATE <ul style="list-style-type: none"> ● Questions ● Complete weekly training checklist ● Review “Check you Knowledge page ● Review next week’s schedule 	Kurt 30 min	

CHECK YOUR KNOWLEDGE

A few facts...

- ❖ 30% of our students are from California
- ❖ On the 2012 Forbes list of best colleges in the nation, Puget Sound is rated #131
- ❖ *LOGGER[net]*, is Puget Sound's Online Alumni Community
- ❖ *ASK* is the Alumni Sharing Knowledge Network; it connects alumni with students
- ❖ Minimum amount to create an unrestricted endowed scholarship is \$35,000



Places to see ... New Residence Hall

- ❖ Completed Fall 2013
- ❖ Open to Junior and Senior students
- ❖ Five-story residence hall includes 11 student "houses"
- ❖ Each "house" contains 9 to 14 individual bedrooms surrounding a great room kitchen and living area, as well as study and gathering areas, bathrooms, and laundry facilities (135 total bedrooms)
- ❖ House four academic communities

Do you know ...

- ❖ How many students are in the freshman class?
- ❖ The minimum gift to an existing endowed scholarship?
- ❖ Where to find a prospect's cultivation stage in Millennium?
- ❖ The location of KUPS radio station?
- ❖ Where to find the sports an alum played in college?
- ❖ The names of two fraternities and two sororities on campus?
- ❖ The names of three residence halls?

Acronyms ...

- ❖ *CGA*-Charitable Gift Annuity
- ❖ *CES*-Career and Employment Services
- ❖ *MOU*-Memorandum of Understanding
- ❖ *COT*-Committee on Trusteeship
- ❖ *GAC*-Gift Acceptance Committee

ORIENTATION - WEEK 3: DAY 14

MONDAY: 8/20		OUR COMMON / ACTIONS / ANNUAL FUND SOLICITATION STRATEGY
TOPICS	CONTACT / TIME	RESOURCES
<input type="checkbox"/> ACTIONS DEFAULTS <ul style="list-style-type: none"> ● Set up defaults for Millennium Actions page ● Actions navigation 	Erin 1 hour	<ul style="list-style-type: none"> 📁 Millennium P & P 📄 Actions Due Report
<input type="checkbox"/> OUR COMMON NAVIGATION Spend time navigating through our Common folders <ul style="list-style-type: none"> ● Capital Giving ● Planned Giving ● Donor Relations ● OUR 	On Your Own 1 hour	<ul style="list-style-type: none"> 📁 OUR common - Capital Giving 📁 OUR common - Planned Giving
<input type="checkbox"/> ANNUAL FUND SOLOCITATION STRATEGY <ul style="list-style-type: none"> ● Discuss strategy for key prospects 	1:30 – 3:00 pm 90 min	


ORIENTATION - WEEK 3: DAY 15

TUESDAY: 8/21		MILLENNIUM – ADDRESS TABLE / REED COLLEGE / PARENT INFO
TOPICS	CONTACT / TIME	RESOURCES
<input type="checkbox"/> MILLENNIUM TRAINING <ul style="list-style-type: none"> ● Address Table 	10:00 – 11:30 pm 90 min	
<input type="checkbox"/> CHRIS BRENTLINGER FROM REED COLLEGE <ul style="list-style-type: none"> ● Actions navigation ● Key actions 	12:00 – 3:00 pm 3 hours	
<input type="checkbox"/> PUGET SOUND INFO – PARENTS <ul style="list-style-type: none"> ● Explore Puget Sound website with focus on parent sections ● Arches - President's Letters ● Frequently asked questions from prospect visits (non-fundraising related) 	On Your Own 1 hour	<ul style="list-style-type: none"> 📄 Parents 📄 Parents Council 📄 Arches Magazine 📄 Prospects FAQ













ORIENTATION

WEEK FOUR

ORIENTATION - WEEK 4: DAY 16

WEDNESDAY: 8/22		PASSAGES ORIENTATION
 PASSAGES ORIENTATION	7:00 – 3:00 pm Camp Parsons	

ORIENTATION - WEEK 4: DAY 17

THURSDAY: 8/23		VISIT NOTIFICATION / DROPBOX / VISIT COUNTS PUGET SOUND INFO – PARENTS
<input type="checkbox"/> VISIT NOTIFICATION <ul style="list-style-type: none"> ● Overview ● Millennium look-up ● Template / Quick Parts - Outlook <input type="checkbox"/> DROPBOX <ul style="list-style-type: none"> ● Shared Folders – Photos / map ● Personal Folders – Travel ● DO uses – how other DOs use dropbox <input type="checkbox"/> MISCELLANEOUS <ul style="list-style-type: none"> ● Named Reservation Process Overview ● Other topics / Questions 	Karen 1 hour	 Outlook Quick Parts  Quick Parts  Athletics and Aquatics Center Hold List  Named Space Reservation Form
<input type="checkbox"/> VISIT COUNTS - OVERVIEW <ul style="list-style-type: none"> ● Overview ● Process – Meeting notification, contact report ● Millennium ● Tracking report 	Pam 30 min	 CG Monthly Reports  Visit Counts  Prospect Manager Activity Report  Meeting Notification Template
 PUGET SOUND INFO – PARENTS <ul style="list-style-type: none"> ● Arches - President's Letters ● Frequently asked questions from prospect visits (non-fundraising related) ● Library/Key Messages – current articles 	On Your Own 1 hour	 Arches Magazine  Prospects FAQ  Current Articles
<input type="checkbox"/> PRESIDENT THOMAS – FACULTY/STAFF CAMPAIGN <ul style="list-style-type: none"> ● Strawberry Shortcake celebration! 	2:30 – 4:00 pm 90 min	

ORIENTATION - WEEK 4: DAY 18

FRIDAY: 8/24		EPROFILE / PORTFOLIO MANAGEMENT / IPAD PRESENTATION PREP
<input type="checkbox"/> E-PROFILE Use prospect eProfile as reference: <ul style="list-style-type: none"> ● Components/ Usage / Purpose ● Run / print eProfile / Dropbox ● Travel process 	Karen 30 min	❖ Sample eProfile 📄 E-Profile - How To
<input type="checkbox"/> PORTFOLIO MANAGEMENT <ul style="list-style-type: none"> ● Visit strategy – TPC / location / ratings ● Visit strategy: Who / how many ● Tools / Reports 	Erin 1 hour	📄 Capital Prospects
<input type="checkbox"/> IPAD PRESENTATION PREP – PROSPECT VISIT <ul style="list-style-type: none"> ● Visit strategy – TPC / location / ratings 	On Your Own 1 hour	📄 Puget Sound Virtual Tour 📄 New Residence Hall 📄 Athletics and Aquatics Center 📄 Weyerhaeuser Hall 📄 Commencement Walk 📄 Campus Master Plan

ORIENTATION - WEEK 4: DAY 19

MONDAY: 8/27		PORTFOLIO MANAGEMENT / ORIENTATION WRAP-UP
<input type="checkbox"/> PORTFOLIO MANAGEMENT – DO PROSPECT STRATEGY <ul style="list-style-type: none"> ● Review DO portfolio ● Identification of key prospects for first 3 months ● Travel plan – Key prospects for each area 	Kurt 90 min	
<input type="checkbox"/> TRAINING REVIEW & RECAP <ul style="list-style-type: none"> ● Review training successes / opportunities ● Complete training checklist ● Development Officer Training Overview – 6 week program ● Prospect Visits – goal ● Travel – goal / plan 		

TRAINING REVIEW: ORIENTATION

Topic	Status		Follow-up
	Completed	Additional Training	
DEPARTMENT / JOB EXPECTATIONS			
OUR OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CAPITAL AND PLANNED GIVING (CPG) OVERVIEW / DETAILS	<input type="checkbox"/>	<input type="checkbox"/>	
JOB EXPECTATIONS	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN PRIORITIES	<input type="checkbox"/>	<input type="checkbox"/>	
INTERNAL COMMUNICATION	<input type="checkbox"/>	<input type="checkbox"/>	
SYSTEM / CAMPUS SET-UP			
SYSTEM SET-UP (CASCADE, MILLENNIUM, OUTLOOK, PHONE)	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPUS SET-UP (KEYS, ID CARD, PARKING PERMIT)	<input type="checkbox"/>	<input type="checkbox"/>	
HR INFO(PAPERWORK, HR TUTORIALS—FERPA/SEXUAL HARASSMENT)	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPUS TOUR	<input type="checkbox"/>	<input type="checkbox"/>	
PUGET SOUND INSIGHT			
ALUMNI	<input type="checkbox"/>	<input type="checkbox"/>	
PARENTS	<input type="checkbox"/>	<input type="checkbox"/>	
STUDENTS / ACADEMICS	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN			
CAMPAIGN PRIORITIES	<input type="checkbox"/>	<input type="checkbox"/>	
ENDOWMENT	<input type="checkbox"/>	<input type="checkbox"/>	
FACILITIES — WEYERHAEUSER / ATHLETICS AND AQUATICS CENTER	<input type="checkbox"/>	<input type="checkbox"/>	
VIRTUAL TOUR / CAMPUS MAP	<input type="checkbox"/>	<input type="checkbox"/>	
SYSTEM NAVIGATION			
MILLENNIUM BASICS:	<input type="checkbox"/>	<input type="checkbox"/>	
- BIOGRAPHICAL SECTION	<input type="checkbox"/>	<input type="checkbox"/>	
- PROSPECT SECTION	<input type="checkbox"/>	<input type="checkbox"/>	
- ACTIONS	<input type="checkbox"/>	<input type="checkbox"/>	
- GIVING SECTION	<input type="checkbox"/>	<input type="checkbox"/>	
- PLANNED GIVING	<input type="checkbox"/>	<input type="checkbox"/>	
- PROPOSALS	<input type="checkbox"/>	<input type="checkbox"/>	
- RELATIONSHIPS	<input type="checkbox"/>	<input type="checkbox"/>	
- MEDIA	<input type="checkbox"/>	<input type="checkbox"/>	
MILLENNIUM NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
OUTLOOK NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
CASCADE NAVIGATION	<input type="checkbox"/>	<input type="checkbox"/>	
OUR COMMON NAVIGATION — CAPITAL GIVING / PLANNED GIVING	<input type="checkbox"/>	<input type="checkbox"/>	

TRAINING REVIEW: ORIENTATION (cont'd)

Topic	Status		Follow-up
	Completed	Additional Training	
PROSPECT PORTFOLIO			
PROSPECT PORTFOLIO	<input type="checkbox"/>	<input type="checkbox"/>	
DO TERRITORIES	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT CULTIVATION STAGE / INCLINATION / GIVING HISTORY	<input type="checkbox"/>	<input type="checkbox"/>	
VISIT STRATEGY: TPC / LOCATION / RATINGS	<input type="checkbox"/>	<input type="checkbox"/>	
TOP TIER / INCLINATION	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT STRATEGY – STRATEGY SHEET	<input type="checkbox"/>	<input type="checkbox"/>	
IDENTIFICATION OF KEY PROSPECTS	<input type="checkbox"/>	<input type="checkbox"/>	
TOOLS / REPORTS: MANAGEMENT OF PORTFOLIO	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT VISITS			
CULTIVATION STAGES (TRACKING)	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT RESEARCH	<input type="checkbox"/>	<input type="checkbox"/>	
PROSPECT VISIT –MOCK VISITS / PARENTS & ALUMNI	<input type="checkbox"/>	<input type="checkbox"/>	
INITIAL CONTACT / BEST PRACTICES	<input type="checkbox"/>	<input type="checkbox"/>	
VISIT PREP – STRATEGY SHEETS / E-PROFILE/CONTACT REPORTS	<input type="checkbox"/>	<input type="checkbox"/>	
MILLENNIUM: CAL LOG / ACTIONS	<input type="checkbox"/>	<input type="checkbox"/>	
CAMPAIGN MATERIALS / CAMPUS MAP / VIRTUAL MAP	<input type="checkbox"/>	<input type="checkbox"/>	
DEMO VISITS (BY DO/DIRECTOR)	<input type="checkbox"/>	<input type="checkbox"/>	
DEVELOP VISIT PRESENTATION – ALUMNI/PARENT	<input type="checkbox"/>	<input type="checkbox"/>	
DEMO CAMPUS TOUR	<input type="checkbox"/>	<input type="checkbox"/>	
IPAD - INTRODUCTION / SET-UP / TOOL WITH PROSPECTS	<input type="checkbox"/>	<input type="checkbox"/>	
CPG SUPPORT TOOLS			
REPORTS OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
E-PROFILE OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
CONTACT REPORTS OVERVIEW	<input type="checkbox"/>	<input type="checkbox"/>	
PROPOSAL LIBRARY	<input type="checkbox"/>	<input type="checkbox"/>	
LIBRARY / KEY MESSAGES (OUR COMMON / CAPITAL GIVING)	<input type="checkbox"/>	<input type="checkbox"/>	
NAMED SPACE RESERVATION PROCESS	<input type="checkbox"/>	<input type="checkbox"/>	

DEVELOPMENT OFFICER TRAINING

30 DAYS

DEVELOPMENT OFFICER TRAINING

WEEK 5	DOT: MILLENNIUM & REPORT BASICS				
	BUDDY VISIT (WITH DO)				
	MILLENNIUM – CUSTOMIZE DO SCREENS / PREFERENCES: - DISPLAY SCREEN - SET UP SORTS/ FILTERS - DAILY REPORTS PROSPECT INFO – BIOGRAPHICAL / GIVING / ACTIONS / TRACKING	PROSPECT INFO – BASIC DATE / EDUCATION / RELATIONSHIPS CAL LOG (CONTACT ATTEMPT LOG) - OVERVIEW - DEMO	MEETING NOTIFICATION CONTACT REPORT VISIT COUNTS INFO UPDATES	ACTIONS DUE COMPLETED ACTIONS ATTACHING / LINKING DOCUMENTS	PROPOSAL TAB REPORTING – CRITERIA / RUN REPORTS / VIEW REPORTS
REPORTS	REPORT OVERVIEW E-PROFILE PROSPECT STRATEGY WORKSHEET PROSPECTS AND POTENTIALS	CALL LIST MONTHLY (OURIS): DONORS 1K AND 5K PLUS	CONTACT REPORT VISIT COUNTS	ACTIONS DUE REPORT COMPLETED ACTIONS SCHEDULED SOLICITATIONS	DAILY (OUR IS): BIO & PROSPECT UPDATES GIFT AND PLEDGE REPORT WEEKLY: CONSTITUENTS CODED DECEASED RUN REPORTS: EXCEL/PDF
WEEK 6	DOT: PORTFOLIO MANAGEMENT				
	BUDDY VISIT (WITH DO / DIRECTOR – CAMPUS TOUR)				
	PORTFOLIO REVIEW STRATEGY / TOOLS MOCK ALUMNI ASSESSMENT VISIT – PRESENT TO DO	PROSPECT STRATEGY TOP TIER /INCLINATION / CULTIVATION STAGE	TERRITORY MANAGEMENT VISIT STRATEGY /TRAVEL	MOCK PARENT ASSESSMENT VISIT – PRESENT TO DIRECTOR	KEY REPORTS REVIEW ARCHES
WEEK 7	DOT: PROSPECT VISITS				
	DO VISIT – NEW DO PRESENTS (ACCOMPANIED BY DO)				
	PROSPECT PREP – STRATEGY SHEET / CONTACT REPORTS / E-PROFILE VISIT GOAL	VISIT SET-UP PROSPECT CONTACT - PHONE - EMAIL FREQUENTLY ASKED QUESTIONS BY PROSPECTS	CULTIVATION STAGE - ASSESSMENT - CULTIVATION - PRE- SOLICITATION - SOLICITATION - STEWARDSHIP MOCK ALUMNI CULTIVATION VISIT – PRESENT TO DO	THE VISIT – MATERIALS / SCRIPT / QUESTIONS / GOALS JOINT VISITS – PREP / EXPECTATIONS FREQUENTLY ASKED QUESTIONS BY PROSPECTS GREEK SYSTEM	NEXT STEPS – CONTACT REPORT / ACTIONS DUE / THANK YOU / MILLENNIUM WEYERHAEUSER HALL TOUR

DEVELOPMENT OFFICER TRAINING (CONT'D)

WEEK 8	DOT: BASIC OPERATIONS (CPG) & COLLABORATION				
BASIC OPERATIONS	DO VISIT (LOCAL) - SOLO				
	TRAVEL OVERVIEW TRAVEL PROFILE P-CARD PROCESS VPN COMPUTER CONNECTION PUGET SOUND WEBMAIL	CONTACT REPORT PROCESS MOCK ALUMNI STEWARDSHIP VISIT – PRESENT TO DO / PREPARE CONTACT REPORT	MEMORANDUM OF UNDERSTANDING (MOU) PROCESS / TEMPLATE LIBRARY CREATE SAMPLE MOU FOR SCHOLARSHIP MILLE: PROPOSALS TAB	LETTER OF INTENT (LOI) PROCESS / TEMPLATE LIBRARY NAMED SPACE RESERVATION PROCESS: RESERVE A SPACE CREATE SAMPLE LOI FOR FACILITIES PLEDGE MILLE: PROPOSALS TAB	PROPOSALS – WRITTEN & VERBAL / TEMPLATES REVIEW SAMPLE PROPOSALS REVIEW CAMPAIGN PRIORITY DO PROJECTS
COLLABORATION	ANNUAL GIVING OUR-IS	ADMISSION CAMPUS TOUR – LED BY DO	ALUMNI & PARENT RELATIONS	DONOR RELATIONS	CORPORATE & FOUNDATION RELATIONS CES: ASK NETWORK & LOGGNET
WEEK 9	DOT: PLANNED GIVING				
	PLANNED GIVING OVERVIEW CAMPAIGN MATERIALS – LEGACY SOCIETY LEGACY SOCIETY – STAGES MILLENNIUM TRACKING	PLANNED GIVING COMMUNICATION – SOUND ADVICE / I-NEWS PLANNED GIVING BROCHURES	BEQUESTS MOU BEQUEST DEMO DO VISIT: LEGACY SOCIETY / BEQUEST	GIFT ANNUITY PROCESS - OVERVIEW CGA PROPOSAL - PG CALC / SAMPLES INCOME BENEFICIARY	TRUSTS OVERVIEW - CHARITABLE REMAINDER TRUST / CHARITABLE LEAD TRUST MILLENNIUM – PLANNED GIFT TAB
WEEK 10	TRAINING REVIEW - “FREE CHOICE”				
	DO VISIT (LOCAL) - SOLO				
	SYSTEMS	OPERATIONS	OUR / CPG DEPARTMENT	REPORTS	PUGET SOUND

