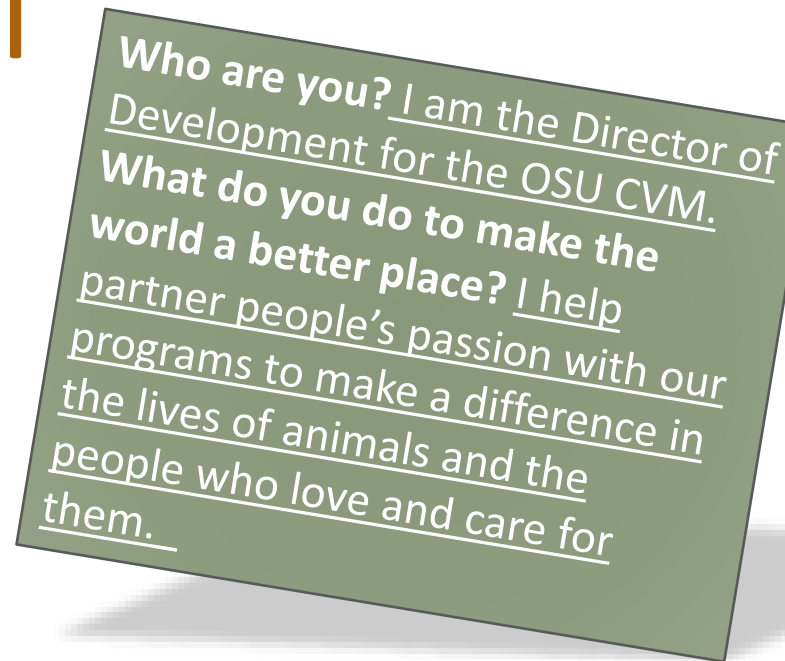


It's Customer Service NOT Cultivation

FIRST ACTIVITY

ANSWER THE TWO QUESTIONS THAT ARE LISTED
ON THE CARD WHICH YOU WILL FIND ON YOUR
SEAT.







A different twist on a familiar story...



OSU's Client Advocate Position



How Do We Help?



Enhancing the Client Experience






Pet of the Month



Pet of the Month

Mya




What is your favorite food or treat?
Love my dogfood!

What is your favorite thing to play with?
Sticks at the river.

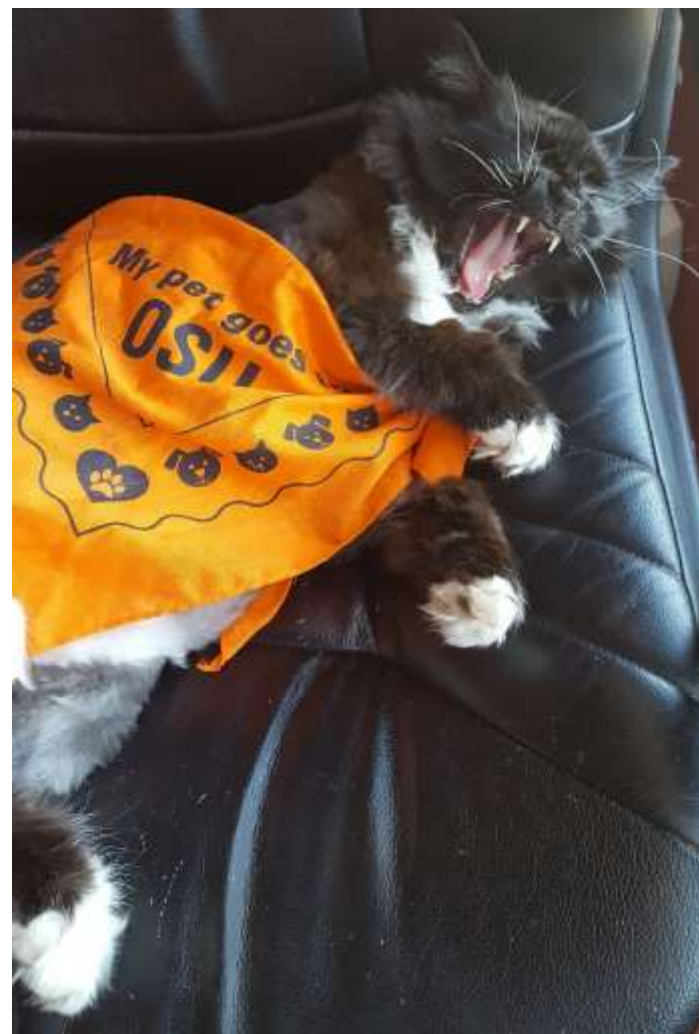
What do you enjoy doing most?
Going for rides in the car.

How would you describe your personality?
Lovable and affectionate.

Describe your most mischievous escapade.
Went in the swamp with my brother
and got all muddy!



Bandana Brigade



Paw Art

Paw art is framed for client enjoyment in lobby hallway



Tail Wags

- Tail wags are used to informally collect feedback for students, staff, and faculty



Outdoor Seating



devote yourself to
an idea
go make it happen.
struggle on it.
overcome your fears.
smile, don't you forget:
this is your dream.

Make it happen
Shock every single one of them

THEY ALWAYS SAY

TIME CHANGES THINGS,

BUT YOU

(ACTUALLY HAVE TO CHANGE THEM)

YOURSELF.



ANDY WARHOL

WHATEVER IS
NOT HAPPENING.
MAKE IT HAPPEN.

YOU COULD
MAKE A WISH
OR
YOU COULD
MAKE IT
HAPPEN

Our Dedicated Volunteers



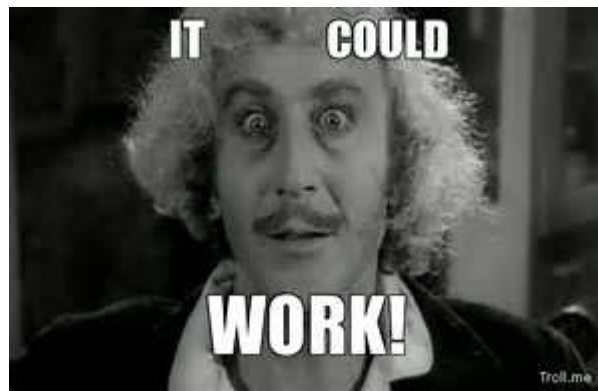
Volunteer Program





We are all working to engage clients...

- What have you done that didn't work?

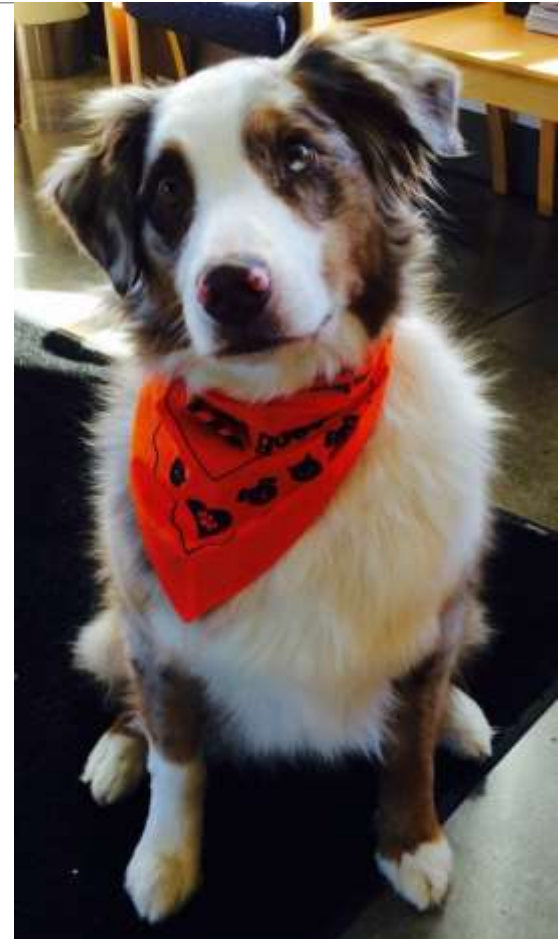


Gauging the Client Experience



Working Relationships

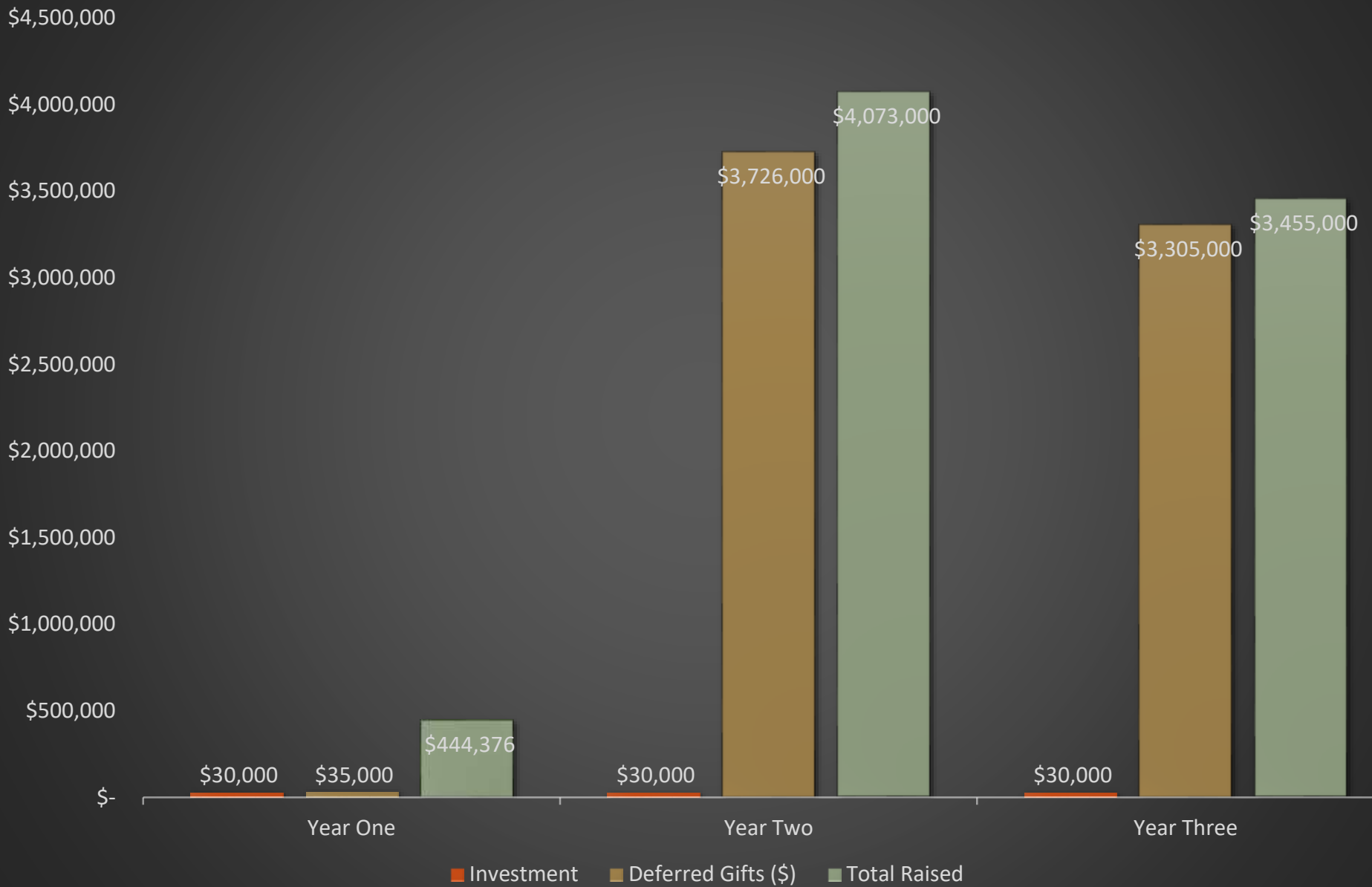
- How we work together
- Reporting structure
- Identifying new donors
- Contact reports and follow-up



Our Program - Results

- Funding Model
 - \$30K per year, \$90K over three years
 - 1/3 donor, 1/3 Dean's office, 1/3 VTH
- Raised \$3,455,000 this past year as a results of grateful client program

Client Giving ROI



Why do clients choose to give?

“It is just the two of us now and three years ago we made the decision to continue to support the OSU College of Veterinary Medicine.”

Grateful Client Program

Lessons Learned

- Internal cultivation is just as important
- Listen
- Arm the front-line
- Grateful tears dry quickly
- Only focus on things that actually make a difference
- Play on high emotion
- The relationship can be with any level – It may not be with you. That's OK!



Next Steps

- Implement program in Large Animal hospital
- How we have prepared to avoid “lessons learned”
- Moving beyond our “natural donor base”



Expanding the Donor Base





Activity

- Where do you choose to spend your time, talents, and treasures?

Toolkit

Grateful Giving Implementation Plan

Phase 1
Research
3 months

Phase 2
Internal Buy-In
and Planning
6 months

Phase 3
Program
Development
6 months

Phase 4
System Level Implementation
12 months



Toolkit

The Three Questions of Grateful Giving

- Who are you?
- What do you do to make the world a better place?
- If you had additional funds, how could you make the world an even better place?
 - \$5,000
 - \$25,000
 - \$5 Million



Toolkit

Grateful Giving is a Team Sport - Tag your Players

Bench-Warmers – “No way do I feel comfortable with that”

Freshmen – “Ok, but only if they bring it up”

B-Team – “I’m always looking for potential donors and can initiate when I see potential”

A-Team – “It is part of my job to ask, it makes a difference and I am willing to share that with potential donors”



Toolkit

Implementing a Client Advocate Program

- Staff position description
- Volunteer duties



It's Customer
Service
NOT Cultivation

Questions???



A photograph of a sunset over a dark, silhouetted cliff. The sun is a bright, glowing orb on the left side of the frame, partially obscured by clouds, casting a warm orange and yellow light across the sky. A single, tall, dark evergreen tree stands on the ridge of the cliff to the right. The text "Thank You" is written in a white, serif font, positioned on the right side of the image, overlapping the dark cliff face. The entire image is enclosed in a thin black rectangular border.

Thank
You

Who are you? _____

What do you do to make the world a better place?

Who are you? _____

What do you do to make the world a better place?

Who are you? _____

What do you do to make the world a better place?

Who are you? _____

What do you do to make the world a better place?

If you had additional funds, how could you make the world an even better place?

\$5K _____

\$25K _____

\$5 Million+ _____

If you had additional funds, how could you make the world an even better place?

\$5K _____

\$25K _____

\$5 Million+ _____

If you had additional funds, how could you make the world an even better place?

\$5K _____

\$25K _____

\$5 Million+ _____

If you had additional funds, how could you make the world an even better place?

\$5K _____

\$25K _____

\$5 Million+ _____

Grateful Giving Program Creation

Presented by Kelley Marchbanks

Program Implementation Timeline



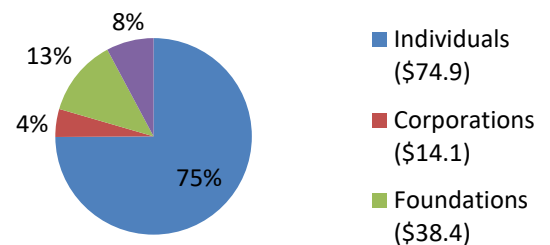
Program Overview

I. PHASE 1 (Research)

- a. Identify Scope of Giving Potential
 - i. Departments
 - ii. Divisions
 - iii. Programs
 - iv. Special projects
- b. Identify Key-Players
 - i. Faculty
 - ii. Staff
 - iii. Students
 - iv. Community Partners
 - v. Advancement Team
 - vi. Administration (college and foundation)
 - vii. Leadership (college and foundation)
- c. Identify Donor Base
 - i. Basic Giving Trends
 - ii. Individual Donors – Grateful Giving Prospects
 1. Create profile of a “grateful donor”
 - a. Review historical data
 - i. Look for groups
 - ii. Look for Outliers
 - b. Profile outliers
 - c. Consider other constituent groups
 - i. Those you serve
 - ii. Those directly affected by the work you do
 - iii. Those indirectly affected by the work you do
 - iv. Those who share your passion
- d. Review successful grateful giving programs
 - i. Processes and Procedures (automatic, transparent and “as regular as billing”)
 - ii. Communications plans
 - iii. Marketing materials
 - iv. Staffing
- e. Identify resources
 - i. Already established and available vs. needed
 1. Personnel
 - a. administrative
 - b. development
 - c. communications and marketing
 - d. external relations
 - e. event planning
 2. Materials
 - a. promotional

Giving (millions)

Source: Giving USA 2010, a publication of Giving USA Foundation



- b. educational
- 3. Technology
 - a. donor tracking and identification
 - b. internal
 - c. external

II. PHASE 2 (Internal Buy-In and Initial Planning)

- a. Create a grateful giving development taskforce/work group
 - i. Include representation from all key-player groups
 - ii. Provide consensus for all information gathered during phase 1
- b. Identify basic grateful giving procedure
 - i. Identifying donors (potential and existing)
 - ii. Donor assessment/rating
 - iii. Follow through
 - iv. Follow-up
- c. Identify other programmatic elements (existing and new)
 - i. Identify engagement opportunities allowing investment in those programs
 - ii. Potential volunteer opportunities
- d. Identify role of all key players in every level of grateful giving facilitation
 - i. Identify/Qualify
 - ii. Build trust-based relationship
 - iii. Locate/confirm philanthropic passion
 - iv. Match passion to organizational initiatives
 - v. Orchestrate evaluation
 - vi. Gain gift commitment
 - vii. Create gratifying giving experience
- e. Identify tools needed for each key player at each level of grateful giving facilitation

III. PHASE 3 (Program Development)

- a. Program development
 - i. Program Specific Staffing
 - ii. Education/Training
 - 1. Leadership
 - 2. Faculty/Staff
 - 3. Development staff
 - iii. Materials
 - 1. Donor materials
 - 2. Faculty tool-kit
 - individualized to each department
 - noting specific needs/opportunities
 - iv. Technology (existing and new)
 - 1. Continue use of development research team
 - 2. Utilizing full capabilities of donor tracking system
 - 3. Expand “give direct” and “needs for sale” concept
 - 4. Media types (email, web-based, web 2.0)
- b. Test group implementation
 - i. Education/Training
 - ii. Roll-out
 - iii. Evaluation process
 - iv. Revision

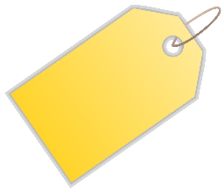
IV. PHASE 4 (System Level Implementation)

- a. Education/Training
- b. Roll-out
- c. Evaluation
- d. Establish a set protocol, procedure and process

Grateful Giving is a Team Sport

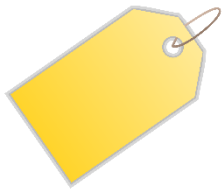
Tag your Players

A-Team



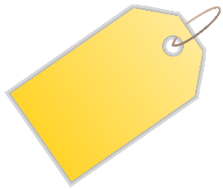
“It is part of my job to ask, it makes a difference and I am willing to share that with potential donors”

B-Team



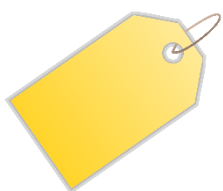
“I’m always looking for potential donors and can initiate when I see potential”

Freshmen



“Ok, but only if they bring it up”

Bench Warmers



“No way do I feel comfortable with that”

Administrative Program Assist

Position Details

Position Information

Classification Title	Administrative Program Assist
Job Title	Administrative Program Assist
Position Classification Code	C0107
Department	Vet Teaching Hospital (VTH)
Employee First Name	Tammy
Employee Last Name	Barr
Effective Date	05/27/2014
Position Number	C32803
Position Appointment Percent	50
Appointment Basis	12
FLSA Status	Non-Exempt/Eligible for Overtime
Job Location	Corvallis
Employment Category	Limited Duration
Work Schedule	Part-Time Benefits Eligible

Position Responsibilities

Position Summary	<p>The College of Veterinary Medicine provides professional and graduate programs for veterinary students, leading to DVM, MS, and PhD degrees. The College operates within a total budget (from all sources) approximating \$16 million annually, which supports educational programs, veterinary medical and diagnostic public services, and research programs which have broad impacts as related to animal and human health. The Veterinary Teaching Hospital (VTH) provides referral care for large and small animals in Oregon and the region; participates, through clinical training, in the education of veterinary students, interns and residents; develops new diagnostic and therapeutic techniques for veterinary care; and provides consultation service to practitioners.</p> <p>The purpose of the Client Relations Advocate is to support and participate in the coordination of development programs within the College of Veterinary Medicine while facilitating communication between clients and staff, supporting staff in development efforts, and fostering positive relationships with clients of the VTH.</p>
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Decision Making/Guidelines

Receives general supervision from the Administrative Assistant to the VTH Directors and Director of Development who assigns work in the form of projects to be developed or tasks to be accomplished. Work is reviewed for conformance to policy and procedures through informal observation and discussion of specific projects and activities. Work is frequently performed independently and reviewed by a supervisor through regular informal conversations as problems occur. Position uses institution and VTH guidelines, policies and procedures to make decisions.

This position requires a clear and unambiguous commitment to compliance of all National Collegiate Athletic Association (NCAA) regulations for Division I (FBS) universities.

No

Lead work responsibilities: Which of the following lead work activities does this position perform?

What percentage of time does this position perform lead work duties?

How many and what type of employees does this position provide lead work for?

Position Duties

30% Coordinate Client Relations Program

Implement new program to enhance the client relations process as well as the policies and procedures at the VTH beginning with the initial client appointment and following through to client outcome. This would be measured with client verbal assessment as well as through online surveys given to clients as an online questionnaire. This position would assist in the development of surveys as well as quarterly reports that will help the Directors to make informed decisions and take appropriate action. The goal of this program is to research and collect client satisfaction levels in order to service them in a more meaningful way. Utilize the client database to access information that will enhance patient health, offer personal support, and provide for client satisfaction.

30% Client Advocacy

Advocate and/or intervene for clients to find ways to improve communication, cooperation, and understanding given to clients from VTH faculty and staff members. Act as a liaison between clients and staff to communicate pertinent information and utilize social work skills to assess client needs and intervene as appropriate.

Keep clients informed about progress and delays in the treatment of the patient with the help of students and clinicians. Greet clients and help them through the admission process in an expedient and courteous manner. Assist in meeting clients' comfort needs such as offering local information (such as hotel, restaurants, shopping), or getting mats for the animals comfort. May put client in touch with Veterinary Chaplain. Provide emotional support for clients as needed and appropriate.

Make recommendations to the VTH Director regarding the use of the Olive Britt Angel Funds to help support clients in financial need. Provide administrative support and coordination for the program. These recommendations would need to meet certain criteria and would be decided upon by VTH Directors.

Maintains the highest degree of patient confidentiality.

10% VTH Program Promotion

Promote the VTH as the health care provider of choice for clients' pets by continuously pursuing excellence in meeting the needs and expectations of all customers (clients, guests, fellow employees and referring DVMs). Promote additional services that the VTH can offer to clients when appropriate by listening and communicating with clients about their service needs.

Strive to consistently improve the VTH service, performance and outcomes by providing constructive feedback and participation in the change process with Directors and VTH Management team.

10% Public Relations Assistance

Work closely with the College Public Relations team to identify potential client, faculty, staff, and volunteer stories to be used internally and externally. Work in conjunction with the College Public Relations team to develop an online client newsletter to keep clients aware of happenings and opportunities to provide support within the VTH.

10% Fund Raising Program Liaison and Coordination

Acquire, renew, and upgrade prospects and donors under the leadership of the Development Director. Assist with the initiation and implementation of a grateful patient program; provide ongoing program coordination. The goal of this program would be to increase client donations to VTH. This position would collaborate with the Development Director to advance major gifts of cash, gift-in-kind, and planned gift arrangements. Includes phone and one-on-one, face-to-face solicitation of gifts. The outcome of this program would be measured and reviewed annually through monetary client contributions.

Minimum Qualifications

Three years of office experience which included two years at full performance level and experience generating documents; and Lead work responsibility or coordination of office procedures.

Additional Required Qualifications

Demonstrated ability to recognize and provide excellent customer relations.

Demonstrated ability in patient/donor stewardship, fund tracking, event planning, and donor acknowledgments.

Previous experience with client/patient relations or comparable experience. This position is designated as a critical or security-sensitive position; therefore, the incumbent must successfully complete a Criminal History Check and be determined to be position qualified as per OAR 576-055-0000 et seq. Incumbents are required to self-report convictions and those in Youth Programs may have additional Criminal History Checks every 24 months.

Preferred (Special) Qualifications

Evidence of ability to work collaboratively with clients, colleagues, coworkers and potential donors.

Excellent oral and written communication skills.

Understanding of and experience in dealing with public and private foundation policies and procedures.

Demonstrated ability in one-on-one, face-to-face solicitation of gifts.

Knowledge of or experience working in a veterinary/medical environment.

Ability to manage multiple projects and set priorities.

Familiarity with e-mail and word processing programs.

Familiarity with patient/alumni/donor database applications.

A demonstrable commitment to promoting and enhancing diversity.

Working Conditions / Work Schedule Physical location will be in the lobby and intake area of the Small Animal Hospital. This position would typically work 20 hours per week, but working schedule may vary.

This position is located in an extremely busy area of the Veterinary Teaching Hospital. May be exposed to noxious odors and infectious diseases. Required to maintain sanitary conditions in work and client reception areas (may require cleaning up after animals in client reception area if other staff are not available). This position requires the incumbent to have a strong constitution as they may be exposed to animal secretions, and suffering or deceased animals.

This position is deemed essential and the incumbent may be expected to report to work during inclement weather, emergency and other University work curtailments or closures.

Signatures/Approvals: My signature denotes that this position description is an accurate and correct statement of the position duties, responsibilities and requirements assigned to this position.

Employee Signature

Supervisor Signature

OSU Veterinary Teaching Hospital

Client Relations Advocate Volunteer Duties

Greet clients in an expeditious and courteous manner

Assist with distributing parking permits to established clients.

Assist with directing clients to reception desk to ensure that they check in.

Help foster positive relationships with clients. Let them know you are available for questions.

Assist in client comfort needs by offering coffee and tea, and local information (hotels, restaurants, shopping)

Be a sounding board for clients to offer them a chance to tell their story while waiting in the lobby

Advocate for clients to find ways to improve communication, cooperation, and understanding

Keep clients informed about progress and delays in treatment through communication with students and reception staff

Help research and collect client satisfaction levels so they can be served in a more meaningful way

Relay relevant client/patient info to Client Relations Advocate for follow-up calls

Relay prospective grateful clients to Client Relations Advocate for follow-up calls

Keep track of “tail wags” from clients. Record client name, patient name, date, and remarks.

Provide emotional support for clients as needed

Maintain client/patient confidentiality at all times