Relationship management skills set is comprised of six categories:

Prospect research fundamentals
Relationships management
Systems
Institutional knowledge
General fundraising
Professional development

Prospect Research

- Knowledge of the roles that prospect information and prospect research planning in prospect development throughout the prospect cultivation cycle.
  Need for:
  - Identification of prospect (locating information)
  - Qualification (analyzing information)
  - Cultivation (interpreting information)
  - Solicitation (applying information)
  - Stewardship (applying information)
- You must also understand student prospect research and products.
Relationship Management

- Knowledge of the institution’s constituent and prospect pools
  - Demographic
  - Research
  - Philanthropic interests as a whole
- Proficiency in delivering information clearly to others or institution’s constraint and prospect pools (written and oral)
- Proficiency in using prospect research data to make recommendations for prospect activity
- Proficiency in designing and analyzing gift pyramids and campaign from reports
- Proficiency in training colleagues on the principles of relationship management and details of relation management systems.
- Proficiency in interpersonal skills required to serve as liaisons between development staff and technical staff for development of plan, inquiries, etc.
- Proficiency with facilitation and coordination skills required to define clear relationship management tools.
- Mastery of constituent segmentation strategies.
- Mastery of prospect recruitment data and team level pool management to information cultivation strategies.
- Mastery of organizational prospect training systems, including relationship management data, constituent, queries, and reports.
Institutional Knowledge

- Awareness of history of development at COC
- Knowledge of current events within the area and impact on philanthropy
- Knowledge of role, effect, and information of prospect information with the organization
- Knowledge of the institution’s decision-making as well as those individuals and departments that have influence
- Knowledge of benefactors, board leaders, key donors, and volunteers

General Fundraising

- Knowledge of role research office plays in fundraising (identification—stewardship)
- Proficiency in the establishment of relation management—experience development processes and procedures
- Knowledge of gift vehicles
  - Cash
  - Services
  - Real estate
  - In-kind
  - Personal Property
  - Trusts:
    - Bequests
    - Annuities
    - Pooled income funds
- Knowledge of appropriate fundraising strategies and trends for constituencies
- Knowledge of volunteer roles, identification, training, recognition, and support
- Understanding of gift accounting, reporting, and standards.
Information Proficiencies

- Awareness:
  - Individual can recognize terms and has a broad understanding of meanings. Actual practice may be minimal and infrequent. Could not instruct others.

- Understanding:
  - Comprehends philosophy supporting the issue, policy or procedure.

- Knowledge:
  - Significant grasp of details, specifics, and shades of meaning. Could present to others.

Skill Proficiencies

- Ability:
  - Trained, but not experienced at accomplishing the activity.

- Proficiency:
  - Individual has developed skills—best practices.
  - Practice has been intense and/or frequent.

- Mastery:
  - Individual has comprehensive grasp of topic detail, specification, and procedures as well as tasks connected to strategic objectives.
  - Practice has been intense and/or frequent.
  - Could instruct colleagues.