AASP Best Practices Process & Protocol

Revision Date: October 1, 2016

# Committee Structure

## Committee Oversight

* Chair of Best Practices oversees activities of Best Practices Subcommittees and serves as a member of Curriculum Committee
* Consultant to Best Practices drafts Best Practices documents and reviews existing Best Practices
* Each Subcommittee has a Chair or two Co-Chairs who oversee the best practices documents originating in their area
* Subcommittees Include:
  + Prospect Development (one team member is an appointed member of APRA)
  + Records Management
  + Advancement Management (including training and organizational development)
  + Information Management
  + Donor Relations and Stewarship (one co-chair is a member of ADRP)

## Committee Members

* Chair or Co-Chairs must be members of AASP, or appointed members of AASP Partner Organizations
* Volunteers for each subcommittee must complete an application
* Terms will be 2 years, with opportunity to renew for additional terms
* Participate in monthly (or bi-monthly) phone conference meetings
* Participate in completion of at least 1 draft Best Practice per year
* In many instances, individuals will be invited to be “one-time” participants for a particular best practice. Application and Terms do not apply in these cases.

## Committee Meetings

* Each month, the Chair of Best Practices meets with subcommittee Chairs via phone conference to discuss updates from each subcommittee
  + Identify potential new best practices
  + Identify existing practices that require updates
  + Set the annual webinar schedule (due by September for the upcoming year so that the programming can be promoted at Summit)
  + Identify Best Practices presentations for Summit tracks and Regional Symposia
  + Identify opportunities to share best practices news and updates in AASP communication vehicles
* Subcommittee Chairs organize monthly (or bi-monthly) meetings for their Subcommittees
  + Identify where we need Best Practices for that area
  + Identify authors for Best Practices and/or identify conference presentations that are good candidates for Best Practices and contact presenters about turning them into Best Practice documents
  + Submit drafts quarterly for posting on the AASP website and promote the draft best practices on FUND-SVCS and other appropriate list serves
  + Create, Update, or Revise approximately 5-6 best practices per year
  + Review any applicable Best Practices drafted or identified by the Consultant
  + Invite, as appropriate, individuals with content applicable to a potential or new best practice (ad hoc committee members who do not serve officially on the committee but have particular knowledge for a specific Best Practice being drafted)
* Annually each summer, check in with all committee members about continued participation to inform the need for any additional volunteers before Summit each October

# Deliverables

## Timelines for Best Practices Documents

* Ideally, a best practice could go from Idea/Identification to Draft to Approved in 2-3 quarters, depending on when they are identified
* ID Best Practice (from FUND-SVCS, Conference Presentation, or other venue) in one calendar quarter, get the draft copy written by the end of that quarter
* Post drafts quarterly
* For drafts originating from the consultant, the one-calendar-quarter timeline from receipt to completion should be as follows:
  + Consultant sends draft document to Subcommittee Chair
  + Subcommittee Chair distributes the draft document to committee member(s) as appropriate for review and finishing the draft
  + Committee Chair returns the completed draft to Consultant for final review and submission as completed draft from Consultant’s Update segment by the 15th of the month deadline for that quarter
* Systemic Review of Best Practices every 5 years on a rolling schedule
  + Each year with Calendar Quarter 1, begin review of any Best Practices that have an original posting date of five years prior
  + Review, update, and create new drafts for comment throughout the year

## Posting Schedule

* Drafts of Best Practices must be received by the Chair of the Best Practices Committee (currently, Meredith Hancks) by the due dates listed below, two weeks prior to the start of the quarter
  + **1st Quarter and Comment Period:** Jan 1-March 31
    - Drafts due Dec. 15
    - After comment period, drafts removed from website April 1, updated/revised, and approved docs due April 30, to be posted behind the firewall during the first week of May
  + **2nd Quarter and Comment Period:** April 1 –June 30
    - Drafts due March 15
    - After comment period, drafts removed from website July 1, updated/revised, and approved docs due July 31 to be posted behind the firewall during the first week of August
  + **3rd Quarter and Comment Period:** July 1 – Sept. 30
    - Drafts due June 15
    - After comment period, drafts removed from website October 1, updated/revised and approved docs due October 31 to be posted behind the firewall during the first week of November
  + **4th Quarter and Comment Period:** Oct. 1 – Dec. 31
    - Drafts due Sept. 15
    - After comment period, drafts are removed from website January 1, updated/revised and approved docs due Jan 31 to be posted behind the firewall duringthe first week of February
* Drafts and Comment Period
  + Draft Best Practices are posted on the AASP website for public viewing for one calendar quarter
  + Request feedback, comments, concerns, questions, edits, etc. from the community at-large, with any feedback emailed to the Chair of that subcommittee or designee listed on the Draft document
    - Do not copy anyone from Sentergroup during the process of checking drafts
    - All communication for draft documents goes through the Chair of Best Practices and the Consultant for Best Practices (currently, Meredith Hancks and Lynne Becker, respectively)
    - Chair of Best Practices and Consultant will forward all drafts and approved documents to Sentergroup for posting at the appropriate time

## Templates

* All Best Practices documents, in draft and approved form, should follow the same template, with these exceptions:
  + Prospect Development Best Practices have the APRA logo on the top of the template directly below the AASP logo
  + Donor Relations & Stewardship Best Practices have the ADRP logo on the top of the template directly below the AASP logo
* Title should be in ARIAL 18-pt. font
* Content should be in ARIAL 12-point font, with headings in bold

Text

Description automatically generated

***Best Practice in (name of practice)***

**Original Date:**  (month, year prepared)

**Revision Date:**

**Originally Prepared By:** (name[s] of primary author[s])

**Revised By:**

**Category:** (one of the six primary sub-categories)

**Comments To:** [**bestpractices@advserv.org**](mailto:bestpractices@advserv.org) **(please include the Name of Practice, above, in the subject line)**

**Description of Practice:**

(brief overview of what the practice covers)

**Prospective Users of Practice:**

(bulleted list of stakeholders)

**Issue Addressed:**

(why a best practice is necessary)

**Desired Outcome:**

(what the best practice will address)

**Process:**

(detailed description of how to implement the practice)

**AASP Recommendation:**

(how practitioners should follow the practice)

**Sample Policies & Procedures:**

(as many samples as available to illustrate details for different types of organizations, different database systems, etc.)

Text

Description automatically generated

Graphical user interface, application

Description automatically generated

***Best Practice in (name of practice)***

**Original Date:**  (month, year prepared)

**Revision Date:**

**Originally Prepared By:** (name[s] of primary author[s])

**Revised By:**

**Category:** (one of the six primary sub-categories)

**Comments To:** [**bestpractices@advserv.org**](mailto:bestpractices@advserv.org) **(please include the Name of Practice, above, in the subject line)**

**Description of Practice:**

(brief overview of what the practice covers)

**Prospective Users of Practice:**

(bulleted list of stakeholders)

**Issue Addressed:**

(why a best practice is necessary)

**Desired Outcome:**

(what the best practice will address)

**Process:**

(detailed description of how to implement the practice)

**AASP Recommendation:**

(how practitioners should follow the practice)

**Sample Policies & Procedures:**

(as many samples as available to illustrate details for different types of organizations, different database systems, etc.)

Text

Description automatically generated



***Best Practice in (name of practice)***

**Original Date:**  (month, year prepared)

**Revision Date:**

**Originally Prepared By:** (name[s] of primary author[s])

**Revised By:**

**Category:** (one of the six primary sub-categories)

**Comments To:** [**bestpractices@advserv.org**](mailto:bestpractices@advserv.org) **(please include the Name of Practice, above, in the subject line)**

**Description of Practice:**

(brief overview of what the practice covers)

**Prospective Users of Practice:**

(bulleted list of stakeholders)

**Issue Addressed:**

(why a best practice is necessary)

**Desired Outcome:**

(what the best practice will address)

**Process:**

(detailed description of how to implement the practice)

**AASP Recommendation:**

(how practitioners should follow the practice)

**Sample Policies & Procedures:**

(as many samples as available to illustrate details for different types of organizations, different database systems, etc.)