Accelerating Portfolio Churn: Part Three of the New Frontiers in Pipeline Development Webconference Series

Translating Insight Into Action

A Discussion and Self-Reflection Guide

Instructions:

Use the following discussion/self-reflection guide to connect today's webconference presentation to your own experiences and institutional context.

1. What is the average length of time prospects spend in cultivation or unengaged in a portfolio at our institution? What factors have, in the past, prevented that time period from decreasing?

2. How do our development officers feel about disqualifying prospects? Why do they feel that way?

3. For how long do development officers at our institution attempt to engage unresponsive prospects before moving them out of their portfolios? What keeps them from more quickly disqualifying unresponsive prospects?

4. How would our fundraisers respond to an automatic sunsetting system for unengaged prospects? Is this a viable approach for our institution?

5. How often do major or principal gift officers hand off prospects to other staff members within advancement (e.g., discovery officers)? How could we incentivize more of these handoffs?

6. What metrics do we currently use to incentivize pipeline activity? What metrics might we add (or take away) to further direct focus toward the pipeline?

7. How much of their time do development officers spend on non-fundraising activities? What are those activities? What steps could we take to minimize the amount of time they spend on these activities?

8. What resources do we have in place to make cultivation planning a less time-intensive activity (e.g., guides, portals, concierge staff, etc.)?

9. Have in-person visits gotten easier or harder to schedule in recent years? What cultivation opportunities do we create for prospects who do not want to meet in person? How do we incentivize development officers to pursue these non-in-person activities?

Strategy Overview

Tactic	My Institution Should Prioritize This Tactic	Notes and Next-steps
"Reasonable Attempt" Contact Criteria *George Washington University* MGOs make two contact attempts through two channels for four consecutive quarters and then disqualify to move onto more responsive prospects.	1 2 3 4 5 *Disagree* *Agree*	
Automatic Prospect Sunsetting System *Colorado Sate University* Prospects whom MGOs do not regularly engage are removed from portfolios; MGOs lose incentive pay points.	1 2 3 4 5	
Discovery Officer Referral Process *Northern Kentucky University* Unresponsive major-gift prospects are handed to discovery officers to continue the outreach process, thereby freeing MGO portfolios up for new prospects.	1 2 3 4 5	
Stage Change Metrics *Ithaca College* Advancement leaders evaluate and reward MGOs based on how many prospects they are able to move from one cultivation stage to the next.	1 2 3 4 5	
Pipeline Cultivation Metrics *University of Southern California* Metric system incentivizes MGOs to perform key pipeline development activities, such as assigning prospects ratings and creating cultivation strategies.	1 2 3 4 5	

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Plug-and-Play Cultivation Guide *Marquette University* 21-page manual for MGOs streamlines cultivation planning by connecting prospect interests with existing opportunities.	1　2　3　4　5 *Disagree*　　*Agree*	
Cultivation Concierge *Bryant University* MGOs offload cultivation planning to concierge and focus instead on execution.	1　2　3　4　5	
Prospect Interaction Metrics *University of California, Santa Cruz* MGOs are rewarded for one-way and two-way exchanges with prospects (other than visits) to increase outreach in new, meaningful ways.	1　2　3　4　5	
Time-Boxed Cultivation Stages *University of Chicago* Institution-wide timeline for cultivation encourages MGOs to accelerate prospects to the ask within 18 months of assignment.	1　2　3　4　5	
Fast-Track Prospect Gap Analysis *University of Southern California* Prospects are selected and prioritized for cultivation based on the likelihood that they will give to capacity before the end of the campaign.	1　2　3　4　5	