



New Frontiers in Pipeline Development Toolkit

Maximizing Major Gifts from Overlooked Prospects

Alumni Relations Prospect Referral Form

Use the form below to facilitate intel-sharing between alumni relations and development. Alumni relations staff members should fill out the form (or use it as a template for an email) after they interact with prospects.

Prospect research should review passed leads before assigning them to development officers. For prospects who are already assigned, this information should be forwarded to the fundraiser managing the relationship.

Engagement Referrals to Research

Wealth Indicators

- | | | |
|--|---|---|
| <input type="checkbox"/> Business Ownership (type of business, years in business, sales trends, recent sale) | <input type="checkbox"/> Investment Properties (commercial, apartments, farms, vineyards) | <input type="checkbox"/> Collections (art, jewelry, antiques) |
| <input type="checkbox"/> Career Path (promotions, titles) | <input type="checkbox"/> Family Foundation | <input type="checkbox"/> Country Club Membership |
| <input type="checkbox"/> Board Involvement (business or civic) | <input type="checkbox"/> Major Philanthropic Gifts to Other Organizations | <input type="checkbox"/> Hobbies (show horses, wine collecting, cars, sailing) |
| <input type="checkbox"/> Secondary Homes | <input type="checkbox"/> Vacation Spots | <input type="checkbox"/> Boarding Schools for Children |
| | <input type="checkbox"/> Yachts, Private Airplanes | <input type="checkbox"/> Household Staff (nannies, chauffeur, interior decorator) |

Ratings 101

A prospect's rating is the approximate range in which he/she could give over 5 years to **all** their charitable interests—**not** the amount that our institution can expect to receive.

The amount that our institution receives depends on the prospect's interest in our institution and his/her enthusiasm for the funding need (scholarship, program, etc.) that is presented.

Capacity Ratings

- A. \$10+ million
- B. \$5-\$9.9 million
- C. \$1-\$4.9 million
- D. \$500,000-\$999,99
- E. \$250,000-\$499,999
- F. \$100,000-\$249,999
- G. \$50,000-\$99,999
- H. \$25,000-\$49,999
- I. <\$25,000

Supplemental Ratings

- Not a Major Gift Prospect Ever
- Not a Major Gift Prospect at This Time
- Unable to Contact/Engage at This Time
- Child of Wealth
- Rising Star

Referral Process

1. Look up constituent in the database. Check if he or she is a rated and/or assigned prospect.
2. If not, or if rating is lower than would be expected based on indicators, then prepare email to notify prospect research of the lead.
3. Include the constituent's name, ID number, and the reason (wealth indicators) for the referral.
4. Send to [INSERT POINTS OF CONTACT].

Dedicated Discovery Scheduler Job Description

The job description below lays out the key responsibilities and necessary skills for a dedicated discovery scheduler. Use this document as a template when crafting your own job description for a scheduler position.

Constituent Engagement Specialist

Position Summary

The constituent engagement specialist identifies prospects, determines engagement strategies and approaches, contacts prospects through cold calls and emails, and secures appointments for a select group of fundraisers focusing on top fundraising priorities.

Major Responsibilities

1. Calling and emailing prospects/donors to re-engage them with the university and to schedule visits with them. **(Primary activity: 70% of time)**
2. Review reports from database systems and work with prospect research, prospect management, and individual fundraisers to generate lists and prioritize prospects by potential.
3. Research individual prospects using a range of database and online sources. Distill the information into interesting and engaging scripts, letters and/or dialogue for conversations with the prospect in the hopes of gaining support for institutional programs. **(Secondary activity: 15% of time)**
4. Work with colleges and selected fundraisers to understand their strategies and fundraising goals for programs and to participate as a member on their fundraising teams, recommending engagement strategies and techniques to engage prospects.
5. Learn about the fundraising programs of the colleges to be able to engage in conversation with prospects and answer questions prospects may have regarding the college, the fundraising programs, and the university.
6. Create logs and notes of contacts for follow-ups; record keeping and tracking.
7. Verify the basic contact information in the donor database for prospects, including address, employer, phone numbers, email address, etc. Report any information needing correction or updating. Record key notes on the prospect to brief the assigned fundraiser.
8. Gather information from prospects and decide on meeting locations. Identify and document driving directions or instructions regarding the meeting and meeting place for fundraisers to make travel to the meetings most efficient.
9. Create contact reports in donor database to record highlights of phone calls, key prospect information, and when meetings are scheduled. Decide which prospects may be more appropriate for other fundraisers or programs, and direct those prospects back to prospect management for reassignment.
10. Generate reports for the director of prospect management and the senior management team to report on activities and accomplishments, including number of calls made, number of visits scheduled, number of bad phone numbers/addresses, and the number of qualifications made.

Dedicated Discovery Scheduler Job Description (cont.)

11. Recommend lead times, length of trips, travel directions and other key success factors to fundraisers to make planning and traveling more efficient.
12. Track, monitor, and assist with the travel calendar for the fundraisers represented to maximize travel efficiency.
13. Teach other fundraisers how to engage prospects through cold calls. Write notes and suggestions for divisional publications on how to improve qualification call successes.
14. Participate in other meetings where prospects, planning, and travel are discussed and reviewed.

Education Requirements

Bachelor's degree or commensurate experience in fundraising, telemarketing, or marketing.

Required Skills and/or Experience

- Comfort making cold calls, developing quick and effective rapport, and fundraising or setting up appointments over the phone, including the ability to work through and learn from repeated rejection.
- Ability to craft tailored, persuasive, and concise emails, letters, and conversations that target individual affinity and interests in order to engage constituents.
- Use social media and internet searches creatively to identify background, employment, and contact information for constituents.
- Ability to stay informed of college program needs and goals and communicate key university messaging to constituents.
- Solid skills in MS Office, including Word, Excel, PowerPoint, and Access.
- Ability to learn new software applications quickly.
- Ability to work independently and proactively to complete multiple tasks and meet critical deadlines with an emphasis on a high-level quality of customer service.
- Ability to work a flexible schedule to contact prospects in different time zones; evening work likely.
- Ability to maintain a high degree of confidentiality.
- Demonstrated written and verbal communication skills.
- Be self-motivated and a self-starter.
- Strong organizational, attention-to-detail, and interpersonal skills.

Pipeline Metrics Picklist

These pipeline-focused performance metrics were featured throughout this publication. Use this picklist to choose new metrics to introduce to your shop.

Fundraiser Pipeline Metrics

Metrics (Choose no more than three)

- Percentage of portfolio meeting “reasonable attempt” criteria (*George Washington University*)
- Number of automatically sunset prospects (*negative metric—Colorado State University*)
- Number of prospects undergoing a stage change (*Ithaca College*)
- Percentage of portfolio with a formalized cultivation strategy (*University of Southern California*)
- Percentage of portfolio with a fundraiser-assigned wealth rating (*University of Southern California*)
- Number of prospects qualified or disqualified (*University of Southern California*)
- Number of outreach attempts (*University of California, Santa Cruz*)
- Number of meaningful interactions (*University of California, Santa Cruz*)
- Number of prospects exceeding cultivation-stage time limit (*negative metric—University of Chicago*)
- Percentage of assigned prospects attending events (*Elon University*)
- Percentage of assigned prospects volunteering (*Elon University*)
- Percentage of assigned prospects giving at any level (*Elon University*)

Goals

What will be the baseline goal for the metrics you select?

Metric 1

_____ *Baseline Goal for Metric 1*

Metric 2

_____ *Baseline Goal for Metric 2*

Metric 3

_____ *Baseline Goal for Metric 3*

Plug-and-Play Cultivation Guide Template

This template helps advancement staff catalog the recurring cultivation opportunities already existing on campus. Compiling these opportunities into a plug-and-play cultivation guide saves MGOS precious planning time as they develop cultivation strategies for prospects.

For each opportunity, write a short description and identify the point person that MGOs would work with to arrange for their prospect to participate in the opportunity.

Cultivation Opportunity Name

Point Person Name

Point Person Phone Number

Point Person Email Address

How Often Does This Opportunity Occur?

What Types of Prospects Would Be Best Suited for This Opportunity?

Description

Cultivation Opportunity Name

Point Person Name

Point Person Phone Number

Point Person Email Address

Plug-and-Play Cultivation Guide Template (cont.)

How Often Does This Opportunity Occur?

What Types of Prospects Would Be Best Suited for This Opportunity?

Description

Cultivation Opportunity Name

Point Person Name

Point Person Phone Number *Point Person Email Address*

How Often Does This Opportunity Occur?

What Types of Prospects Would Be Best Suited for This Opportunity?

Description

Plug-and-Play Cultivation Guide Template (cont.)

Cultivation Opportunity Name

Point Person Name

Point Person Phone Number

Point Person Email Address

How Often Does This Opportunity Occur?

What Types of Prospects Would Be Best Suited for This Opportunity?

Description

Cultivation Opportunity Name

Point Person Name

Point Person Phone Number

Point Person Email Address

How Often Does This Opportunity Occur?

What Types of Prospects Would Be Best Suited for This Opportunity?

Plug-and-Play Cultivation Guide Template (cont.)

Description

Cultivation Opportunity Name

Point Person Name

Point Person Phone Number *Point Person Email Address*

How Often Does This Opportunity Occur?

What Types of Prospects Would Be Best Suited for This Opportunity?

Description

Digital Gift Officer Job Description

The job description below lays out the key responsibilities and necessary skills for a digital gift officer. Use this document as a template when crafting your own job description for a digital gift officer position.

Digital Gift Officer

Position Summary

The digital gift officer will develop and implement digital engagement and solicitation strategies for identified segments of the alumni body, improving both the breadth and depth of engagement, and enhancing the future of efforts with alumni.

The position's responsibilities will include the development of comprehensive metrics to demonstrate the results of his or her efforts.

The digital gift officer will further assist with crowdfunding efforts and serve as a liaison for digital engagement efforts with alumni relations.

As a member of the annual giving team, the digital gift officer will assist annual giving in pursuing the fundraising goals and may be assigned additional projects as determined by the director.

Major Responsibilities

- 1. Direct Solicitation/Stewardship:** Using digital strategies, the officer will identify, qualify, cultivate, solicit, and steward selected alumni as donors, advocates, and volunteers. He or she will identify alumni influencers for the institution in the digital and social media realms, actively seek ways to best utilize new fundraising technologies in annual giving, and maintain comprehensive information in the donor database about engagement efforts and personal interactions. **(55% of time)**
- 2. Digital Engagement Strategy:** The officer will develop a comprehensive digital engagement and solicitation strategy for identified segments of the alumni body. He or she will curate information from technology such as LinkedIn, Facebook, Instagram, Twitter, and others to measure demonstrated interest for college priorities. He or she will work closely with partners in alumni on engagement strategies and across advancement for solicitation strategies. **(20% of time)**
- 3. Data Analysis:** The officer will design and execute data-driven metrics to evaluate the reach and return for all digital engagement strategies, manage the establishment of baseline analysis for all annual giving digital solicitations and digital engagement efforts, and work with the director and other members of the annual giving and alumni relations teams to identify trends as they develop. **(10% of time)**
- 4. Special Projects:** The officer will be responsible for making solicitation calls and texts on behalf of office of annual giving at the end of the fiscal year. This position will require significant evening work at certain times throughout the year. Other duties as assigned by the director of annual giving. **(15% of time)**

Digital Gift Officer Job Description (cont.)

Education Requirements

Bachelor's degree required.

Required Skills and/or Experience

- Experience with all forms of social media, including social media metrics. Willingness to try new things and learn new skills. Strong data analysis experience.
- Strong strategic planning, data analysis, and written communication skills required. Must be organized, versatile and a self-starter. Excellent computer and word-processing skills required. Desire to work with a variety of digital platforms and identified alumni interests. Ability to be a team player in a collaborative, fast-paced environment.



Washington DC | Richmond | Birmingham | Minneapolis

P 202-747-1000 | **F** 202-747-1010 | eab.com