New Frontiers in Pipeline Development

Maximizing Major Gifts from Overlooked Prospects
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Higher ed fundraising has enjoyed banner years of late. Total dollars raised have increased significantly, inspiring colleges and universities to launch ambitious campaigns.

As overall fundraising returns have climbed, advancement leaders have begun to look to the future and consider their institutions’ long-term revenue sustainability. Unfortunately, the situation as they see it is far from secure.

A small number of mega-gifts from well-established donors have powered higher ed’s recent fundraising growth. Yet few institutions can boast of a well-developed pipeline of on-deck major gift supporters. Without a cohort of donors rising through the gift pyramid, advancement leaders will find themselves unable to continue the current climate of fundraising success in the coming years and decades.

The lack of a pipeline has less to do with a dearth of prospects than with oversight in cultivation. For most institutions, upwards of 80% of their major gift prospects go overlooked by the major gift officers tasked with engaging them.
An All-Advancement Approach to Pipeline Development

Best practice institutions maximize major gifts from overlooked prospects by adopting a segmented strategy for managing the prospect pyramid. They focus on three imperatives:

1. Overcoming the barriers preventing MGOs from increasing coverage within their portfolios;
2. Accelerating portfolio churn to free up room for high-potential, unassigned prospects; and
3. Scaling personalized cultivation for tomorrow’s prospects by engaging other areas of the advancement enterprise in the work of pipeline development.

This study will focus on the tactics necessary to achieve these aims. It will profile the efforts of advancement teams at Marquette University, Davidson College, Northern Kentucky University, McGill University, the University of Michigan, and many more to double down on pipeline development.

To achieve success in pipeline development, advancement leaders must look critically at nearly every area of the advancement operation. In that spirit, this study will touch on MGO management, performance metrics, fundraising technology, and collaborations with other units within advancement, including annual giving, alumni relations, and marketing/communications.

The stakes of pipeline development are high. Without a strong effort in this area, colleges and universities may soon find themselves with diminishing fundraising revenue. But conversely, making progress on pipeline development can bring with it fundraising growth for decades to come.

Source: Advancement Forum interviews and analysis.
The Sustainability Crisis in Higher Ed Fundraising
The years since the Great Recession have brought immense growth at the top of America’s wealth pyramid. The number of millionaire households in the United States has reached a new record high every year since 2013. Driven by a burgeoning stock market, high-net-worth individuals have amassed ever-larger large fortunes. These trends have vaulted many into the very top wealth percentiles for the United States.

This growth may be accelerating. Indeed, the rate of growth for millionaire households has outpaced the rate of population growth overall in the United States for the past half-decade. Whereas in 2008, 1 in 17 households were millionaire households, by 2016 that number had climbed to 1 in 12.


1) Wealth calculations exclude primary residence.
Boom Times North of the Border

Canada Also Sees Upswing in Millionaire Households

A Growing Base of Wealth

Number of Millionaire Households in Canada, 2015-2021

<table>
<thead>
<tr>
<th>Year</th>
<th>Millionaire Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>385,000</td>
</tr>
<tr>
<td>2016</td>
<td>485,000</td>
</tr>
<tr>
<td>2021 (Projected)</td>
<td>785,000</td>
</tr>
</tbody>
</table>

By 2021...

- 5.5% of Canadian households will control...
- 38% of all wealth in Canada

Canada goes from 8th in the world to 5th in the world, with more to come.

The increase in private financial wealth has spread north of the US-Canada border as well. Recent years have brought impressive increases in the ranks of Canada’s millionaire households. Incredibly, between 2015 and 2016, the number of millionaire households grew by 26%, launching Canada into the global top five for millionaire households.

While the concentration of wealth in fewer hands is far from an unalloyed good, it has created greater opportunities for philanthropic gains among colleges and universities in North America. Greater wealth in the community brings higher potential for major gifts.

To capitalize on these opportunities, advancement professionals have embraced big data to identify major-gift prospects.

Advancement isn’t alone in embracing big data. The world as a whole has gone through a big data revolution in recent years and will continue to do so for years to come. The unprecedented availability of data today has revolutionized industries. Disruptive innovators across sectors have used data to work smarter and bring in greater gains at lower cost.

In the world of advancement, these innovations have often taken the form of more sophisticated wealth ratings, propensity ratings, and predictive models. These data resources have by now become ubiquitous in the industry.

Interestingly, some advancement leaders have begun to worry about declining returns on data. They recognize that all the data in the world will do little for advancement’s performance if fundraisers do not act on newly discovered major-gift opportunities.


1) 1 exabyte = 1,000,000,000 gigabytes (or 200,000,000 first-generation iPods).
At many advancement shops, far too many major-gift opportunities go overlooked. Upwards of 80% of high-net-worth, high-inclination prospects go uncultivated, often despite their inclusion in major gift portfolios.

Ignoring these prospects comes with a steep opportunity cost. The median institution in an analysis that EAB conducted stood to gain tens of millions of dollars from increasing prospect penetration by just a few percentage points.

Other organizations in the nonprofit sector have not made the same mistake as colleges and universities. They have rushed in recent years to cultivate the major gift prospects that higher education fundraisers overlook.

As nonprofits proliferated, more than tripling in number across the past thirty years, they have formalized their major gift programs and launched capital campaigns.

Today, high-net-worth individuals have many competing asks for their mindshare and no lack of organizations that can help them achieve their philanthropic aims.
An Unstable Center of Gravity

Overreliance on Top of Giving Pyramid Creates Unsustainability Risk

Contraction at the top of the giving pyramid poses great risks to advancement shops due to higher ed’s overreliance on major gifts.

EAB analysis of members’ gift pyramids revealed that the median institution relies on just 36 gifts—0.3% of all gifts—to provide 63% of annual revenues. The giving level below those top gifts, from $25,000 to $99,999, is likewise sparsely populated.

Advancement leaders and industry commentators alike worry about the inherent unsustainability of such a top-heavy fundraising strategy. Many of them wonder aloud how long our present success can last.

Our Shrinking Island

“Relative revenue stability may be masking the significance of the underlying trend: nonprofits are receiving roughly the same amount of money from fewer and fewer donors each year. This is a strategy that may allow organizations to meet their revenue goals in the short term, but may not be sustainable over the long term.”

Target Analytics donorCentrics Report, 2015

Success Rests on Needle-Thin Donor Segment

Revenue and Gifts by Gift Level, 2014-2016 Average

Contraction at the top of the giving pyramid poses great risks to advancement shops due to higher ed’s overreliance on major gifts.

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Fundraising unsustainability poses particular problems for higher education advancement due to colleges' and universities' reliance on long-term comprehensive campaigns. Across the past 20 years, campaigns have grown into behemoths. They last longer than they used to, and they aim at a far higher goal. If advancement leaders are not able to sustain their present successes for the full duration of their campaigns—often a decade or more—then they may find their initial aspirations were misguided.

### Mega-Campaigns Continue to Grow
*EAB Analysis of Longitudinal Campaign Data from 34 Institutions*

<table>
<thead>
<tr>
<th></th>
<th>Campaign 1</th>
<th>Campaign 2</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Launch</td>
<td>1998</td>
<td>2012</td>
<td>--</td>
</tr>
<tr>
<td>Total Length</td>
<td>7 Years</td>
<td>8 Years</td>
<td>14%</td>
</tr>
<tr>
<td>Median Goal</td>
<td>$1.225 Billion</td>
<td>$2.75 Billion</td>
<td>107%</td>
</tr>
<tr>
<td>Maximum Goal</td>
<td>$2.5 Billion</td>
<td>$9 Billion</td>
<td>260%</td>
</tr>
</tbody>
</table>

### Smaller Shops Follow Suit
*CASE Campaign Report 2015*

$33M ➞ $75M

Median campaign goal in 2013 ➞ Median campaign goal in 2015

**But Have We Overextended Ourselves?**

“We’re launching a campaign three times the size of our last one. There’s a lot of untapped potential out there, but I don’t know if we can capitalize on it. It’s promising on paper, but in practice, I’m not so sure.”

*Vice President, Advancement Private Master’s University*

Fundraising unsustainability poses particular problems for higher education advancement due to colleges' and universities' reliance on long-term comprehensive campaigns.
The situation looks especially dire in light of the many threats facing higher education advancement.

Demographic decline is the most commonly cited of these threats. The average age of major gift donors has increased notably over the past 40 years. Many institutions rely on individuals who may soon scale back their philanthropy or cease giving altogether to power their campaigns. Without these individuals’ support, advancement leaders may find that their next campaign must aim for a more modest goal—or that their current campaign’s goal is no longer feasible.

Economic decline poses a real, though unpredictable, risk to higher education fundraising. While no one can say exactly when the next downturn will come, when it does, it’s likely to have an outsized effect on major gifts. Organizations with top-heavy giving pyramids are likely to feel the negative effects most.

Lastly, colleges and universities must concern themselves with the shrinking window of opportunity that prospect neglect creates. A major gift is the culmination of years of sustained engagement with an organization. If higher education fundraisers are overlooking 80% of their institutions’ high-potential prospects, these relationships will never reach major giving.
This study explores how advancement leaders across North America have built more sustainability into their giving pyramids. We will focus on three priority prospect populations: assigned but overlooked prospects, high-potential unassigned prospects, and developing-potential prospects.

For assigned but overlooked prospects, advancement leaders target the barriers to cultivation. There are reasons MGOs don't cultivate them: MGOs regard big lists of new prospects skeptically; they grow discouraged when cold calls yield few results; they struggle to prioritize long-term pursuits when their short-term revenue goals are so ambitious. Best practice institutions lessen these pressures to clear the way for more work with new prospects.

Next, high-potential unassigned prospects would likely attract attention from MGOs were it not for overcrowding in their portfolios. Portfolios are overfull and stagnant, with prospects lingering for years on end without movement. Accelerating portfolio churn moves prospects through and out of portfolios quickly to free up room for the next-best tier of prospects.

Lastly, developing-potential prospects are those who do not yet have the potential to give major gifts, be it due to ongoing growth in their personal wealth or a lack of prior engagement with the institution. Personalized cultivation at scale advances these individuals through the pipeline without resource-intensive in-person cultivation.

With these strategies, advancement teams will expand their gift pyramids and lay the groundwork for sustainable fundraising success.

Source: Advancement Forum interviews and analysis.
Increasing Prospect Coverage
The first section of this study will investigate how best practice institutions increase prospect coverage for assigned but uncultivated prospects.

This population is alarmingly large, with over half of all the average major gift officer’s portfolio going overlooked. These prospects would likely take visits and give major gifts if fundraisers attempted to engage them. Yet fundraisers do not do so. High-potential prospects languish in their portfolios for years without active, strategic engagement.
The problem of assigned but overlooked prospects afflicts all of higher education advancement. It has two distinct root causes: an institutional need to create the appearance of prospect coverage and major gift officers’ desire to “claim” prospects, even if they themselves don’t have the time to cultivate them.

In many instances, institutional priorities and misaligned incentives contribute to the problem. Advancement leaders want to demonstrate to their presidents and boards that they are paying attention to the institution’s highest potential prospects. To do so, they assign them in great numbers to fundraisers, even when those fundraisers don’t have the time to cultivate them.

Fundraisers’ behaviors also contribute to low prospect coverage. Often, fundraisers hold high-potential prospects in their portfolios so that someday, they hope, they’ll be able to cultivate them. While they have no short-term cultivation strategy for these prospects, the last thing they want is for another MGO to act faster and capitalize on an opportunity they’d prefer to hold for themselves.
Outsized Returns from New Prospects

First-Time Visits Bring Major Gifts at High Rate

Low prospect coverage, while understandable given advancement leaders’ and MGOs’ incentives, undermines the viability of the long-term major gift pipeline.

Development offices rely disproportionately on new donors to fill tomorrow’s pipeline. New prospects with whom MGOs meet have a nearly one in five chance of someday giving a major gift. For some institutions, that ratio can climb to one in two new prospects.

If MGOs concentrate only on donors with whom the institution has already established philanthropic relationships, they miss out on opportunities for an expanded pool of major gifts in the future.

Not only does increased prospect coverage benefit the institution’s long-term pipeline—it also leads to higher short-term performance among individual MGOs.

A key differentiator between top-performers and bottom-performers is how much time they spend with new prospects. While the total amount of time they spend in the field has little impact on their progress against goal, directing more of that time toward new prospects helps them cultivate a personal pipeline of prospects and consistently deliver results year over year.
So Why Don’t MGOs Double Down on Discovery?

Three Root Causes of Underwhelming Pipeline Outreach

Distrust of Assigned Prospects’ Potential

- Low conversion rate of discovery visits leads to skepticism, disillusionment
- Inaccurate wealth ratings increase distrust

Discomfort with Cold Calling

- Blind outreach least compelling part of fundraisers’ jobs
- Low hit rate compounds problem

The “Tyranny of the Immediate”

- MGOs held to demanding performance standards for dollars, visits, gifts
- Unqualified prospects don’t help MGOs hit other goals

"Dead-end discovery visits are discouraging. They make it more likely that MGOs will avoid discovery in the future.”

Vice President, Advancement
Public Master’s University

"Major gift officers hate cold calling. They’ll do just about anything they can to avoid it.”

Associate Vice President, Advancement Services
Public Research University

"We’ve been chasing higher and higher campaign goals. But today’s pursuits can lead to pipeline neglect.”

Vice President, Advancement
Private Research University

Despite the institutional and personal benefits of increasing prospect coverage, MGOs typically shy away from the task.

There are three primary roadblocks standing between MGOs and the discovery and qualification activity they would need to do to increase prospect coverage.

First, new prospects are often introduced to MGOs with little supporting intel on why the institution believes they are promising candidates for major-gift cultivation. The intel they do receive tends to focus on wealth ratings whose accuracy is questionable at best.

Second, the act of reaching out to prospects with whom the institution has no established relationship is intimidating. Cold calling is a necessary evil—but in many MGOs’ minds, the emphasis falls on “evil,” which leads them to deprioritize the task.

Lastly, even MGOs who wish to do more discovery and qualification work must struggle through the “tyranny of the immediate.” Their short-term fundraising expectations seem achievable only through an intense and single-minded focus on today’s prospects. In that high-pressure environment, tomorrow’s best leads fall through the cracks.

Source: Advancement Forum interviews and analysis.
Increasing Prospect Coverage

Three Approaches to Boost the Pace of Discovery Activity

<table>
<thead>
<tr>
<th>Approach #1: Increase Confidence in Prospect Potential</th>
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<tbody>
<tr>
<td><strong>Rethink assignment protocols to focus on verified warm prospects</strong></td>
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<td>Pre-Qualification Prospect Referrals</td>
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<tr>
<th>Approach #2: Elevate the Discovery Visit Hit Rate</th>
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<tr>
<td><strong>Prioritize prospects who are not just wealthy, but also likely to take a visit</strong></td>
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<th>Approach #3: Create “Act Now” Urgency</th>
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<td><strong>Alter discovery’s “choice architecture” to incentivize MGOs to take action</strong></td>
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<td>Digital Pipeline Nudges</td>
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This section will present three strategies for circumventing the roadblocks that dampen discovery and qualification.

Increasing confidence in prospects’ potential overcomes the distrust that many MGOs feel toward their newly assigned leads. By injecting a more “human” element into lead-passing, advancement leaders can improve MGOs’ trust in the major-gift potential of their discovery assignments.

To combat MGOs’ discomfort with cold calling, some institutions have sought to increase the frequency with which MGOs hear “yes” when they reach out for a visit. Elevating the discovery visit hit rate transforms cold calling from a discouraging activity into a rewarding one.

Lastly, advancement leaders can take steps to help MGOs manage through the “tyranny of the immediate” by nudging them gently toward the pipeline. By putting important but seemingly less urgent pipeline activities in front of MGOs at key times, they can increase the likelihood that MGOs will act on them.

We will begin with increasing confidence in prospect potential.
A Lack of Confidence in Assigned Prospects

MGOs Look at Unqualified, “Cold” Prospects with Skepticism

MGOs hold decidedly negative opinions about how new prospects are assigned at their institutions. On average, MGOs suspect that 63% of their newly assigned prospects are “false positives” lacking the wealth or inclination to make a major gift.

When asked why their prospect research teams nevertheless prioritized these prospects for assignments, MGOs cite what they see as random assignment protocols done at a scale that prohibits attention to detail. Importantly, they also suspect that an overreliance on faulty wealth ratings often leads prospect research astray.

The skepticism with which MGOs regard their newly assigned prospects lowers the rate at which they undertake discovery and qualification activity. The frustration they feel from prospect leads gone astray reduces the likelihood that they’ll take the “leap of faith” with a new prospect in the future.

Practice 1: Alumni Relations Prospect Referral Form

Increase Confidence in Prospect Potential

Practice in Brief
Alumni relations staff record key intel about their interactions with prospects to send to prospect research for review and assignment. A template form lists key indicators of philanthropic capacity, providing a quick-start guide for discovery. Alumni relations staff learn to consistently identify major gift potential, and MGOs approach referred prospects with a greater sense of confidence in their major gift likelihood.

Problems Addressed
Alumni relations staff regularly interact with high-potential prospects, yet few formal channels exist through which to share this information, resulting in relatively few leads being passed. Conversely, MGOs regularly overlook their newly assigned prospects due to skepticism about the prospects’ capacity or likelihood to give. Without greater assurance that a newly assigned prospect is in fact a good lead, these prospects languish in portfolios.

Diagnostic Questions
1. Do MGOs express skepticism or doubt that their newly assigned prospects have major gift potential?
   ___Yes ___No

2. Do alumni relations staff regularly interact with high-potential prospects?
   ___Yes ___No

3. Does your institution lack formal, systematized channels for alumni relations staff to share prospect intel with the development team (beyond one-off emails, phone calls, etc.)?
   ___Yes ___No

If you answered “Yes” more times than “No,” you may wish to prioritize an alumni relations prospect referral form.

Institution Profiled
Marquette University
• Institutional control: Private
• Enrollment: 11,294 (8,238 undergraduate)
• Carnegie classification: Research University
• Campus setting: Large City (Milwaukee, WI)

Implementation Resource
See p. 128 for the alumni relations prospect referral form template.
Marquette University has aimed to overcome MGOs’ skepticism of newly assigned leads by offering more qualitative—and urgent—intel behind why particular prospects were assigned. They do so through an alumni relations prospect referral form.

Alumni relations staff at Marquette are trained to use the form to share intel on alumni they interact with in the course of their work. The form lists out wealth indicators that may come up in conversation, and when alumni relations staff hear them, they’re asked to fill out the form to let prospect research know.

Marquette University’s Alumni Relations Prospect Referral Form

**Wealth Indicators**

Pay attention to *cues in conversation*; even one *indicator* is major gift prospect; multiple checks make possibility greater!

- Business ownership
- Secondary homes
- Family foundation
- Yachts
- Private airplanes
- Wine collecting
- Art collections
- Country club member
- Show horses
- Sailing
- Boarding schools
- Household staff

**Ratings 101**

<table>
<thead>
<tr>
<th>Wealth Range</th>
<th>Prospect Status</th>
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<tbody>
<tr>
<td>$10M+</td>
<td>Not now</td>
</tr>
<tr>
<td>$5M-$9.9M</td>
<td>Not ever</td>
</tr>
<tr>
<td>$1M-$4.9M</td>
<td>Child of wealth</td>
</tr>
<tr>
<td>...</td>
<td>Rising star</td>
</tr>
</tbody>
</table>

**From Referral to Assignment**

Meet prospect at event

Check database to make sure prospect is not currently assigned

Email referral, with form as a guide, to prospect research

Source: Advancement Forum interviews and analysis.
Every year, the alumni relations prospect referral form turns up major gift prospects whom the advancement team at Marquette has overlooked. In its first six months, the form led to three major gifts, including a $50,000 endowment. Since then, the form identifies 24 to 60 new major gift prospects annually.

Apart from the forms’ new-prospect-identification gains, the team at Marquette has benefited from having more qualitative intel to use when prioritizing prospects. The knowledge that a particular prospect had just spoken to an alumni relations staff member and shared information about her family foundation or other philanthropic investments overcomes MGOs’ natural skepticism of unknown discovery prospects.

Source: Advancement Forum interviews and analysis.
Practice 2: Student Caller Lead Generation

Increase Confidence in Prospect Potential

Practice in Brief
Top-performing student callers contact highly rated, unassigned prospects to gauge their philanthropic interest and pass leads to major gift officers. These “hot” and “warm” leads inspire a sense of urgency among MGOs. The personal interaction that led to the lead being passed overcomes MGO skepticism that prospects are assigned due purely to an overreliance on wealth ratings and other data-based indicators of potential.

Problems Addressed
Large numbers of highly rated prospects are coded for discovery, yet MGOs often suspect that the data informing those codes are faulty and unreliable. Due to the high time investment necessary for a discovery visit, many MGOs deprioritize the discovery visits that would substantiate these prospects’ potential.

Diagnostic Questions
1. Does your institution operate a student calling program in-house?
   ___Yes ___No

2. Does your calling program employee at least one student who would be capable of leading discovery calls with highly rated prospects?
   ___Yes ___No

3. Do your MGOs have capacity to visit prospects whom a discovery caller identifies as high-potential?
   ___Yes ___No

If you answered “Yes” more times than “No,” you may wish to prioritize a student caller lead generation initiative.

Institution Profiled
University of Michigan
• Institutional control: Public
• Enrollment: 44,718 (28,983 undergraduate)
• Carnegie classification: Research University
• Campus setting: Midsize City (Ann Arbor, MI)
Deploying Student Callers to Surface Leads
High-Performing, Specially Trained Phonathon Callers Test Visit Likelihood

The University of Michigan’s Student Lead Generation Initiative

Elite Student Callers + High-Potential Prospect List = Warm Major Gift Leads

Specialized Training
10 top-performing students received guidance on longer conversations, qualification

Discovery-Focused Scripts
No gift ask; explored interest in MGO conversation

Expansive, but Targeted
9,000 unassigned prospects with high net worth, interest in student support for community list review

Covering Miles of Ground
6,000 prospects called over 6 weeks, $9K budget yields 1,500 successful contacts

Strategic Handoffs
100+ “Hot,” “warm” leads passed to MGOs for further cultivation

Required Follow-Through
Temp worker contacts MGOs to ensure follow-up within 48 hours

During a recent pilot, the University of Michigan took a proactive approach to surface warm leads to overcome MGOs’ skepticism.

Advancement staff trained ten high-performing student callers on discovery scripts that focused on student support. They then asked them to call a group of 6,000 unassigned high-potential prospects over six weeks to engage them in conversation.

Rather than making a gift ask on the phone, the students discussed the philanthropic interests of the 1,500 prospects they reached during the pilot, shared information about student support at Michigan, and—importantly—asked if the prospects had an interest in a follow-up conversation with a development officer.

The pilot yielded over 100 hot and warm leads with whom gift officers then followed up.

Source: Advancement Forum interviews and analysis.
Momentum Builds from Student Calling Leads

Gifts in the Short Term, and Even Bigger Long-Term Major Gift Results

Immediate Results, Clear Payoff
(from 9,000 unassigned prospect list)

$48.5K In immediate revenue through unsolicited phone gifts or gifts in first follow-up conversation or visit

Impact on Long-Term Major Gift Activity

Large major gifts already given or in progress, including several endowed scholarships

3

In gift proposals tagged to previously unassigned prospects since initiative

$4M+ $4M+

Prospects now assigned a prospect manager and in an active portfolio

119

Despite the lack of a gift ask during the call, the initiative generated $48,500 in immediate philanthropic revenue. Many prospects insisted on giving over the phone or sent a gift along in follow-up.

Yet the true success of the pilot lay in longer-term major gift pursuits. In the months after the calling period concluded, MGOs brought in or were in the process of cultivating three large major gifts, including funding for several endowed scholarships. On top of that, prospects whom the student callers contacted had over $4 million in gift proposals tagged to them. They had all been unassigned prior to the initiative.

One reason for the calling program’s success was the way in which the new prospects were introduced to major gift officers. Rather than seeming like random names in a list, these prospects had come to gift officers by way of a conversation with another person. They could not dismiss these leads as a wealth rating algorithm gone haywire. Rather, they were real, trustworthy, and urgent.

Source: Advancement Forum interviews and analysis.

Covering New Ground

“All of these prospects had been unassigned before this initiative. We wanted to find a way to effectively screen a large population and determine levels of interest in student support. We documented nearly 1,500 decision points and added new donors to portfolios and cultivation efforts.”

Megan Doud
Senior Director, Annual Giving
University of Michigan
**Increasing Prospect Coverage**

Three Approaches to Boost the Pace of Discovery Activity

<table>
<thead>
<tr>
<th>Approach #1: Increase Confidence in Prospect Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rethink assignment protocols to focus on verified warm prospects</td>
</tr>
<tr>
<td>Pre-Qualification Prospect Referrals</td>
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</table>

<table>
<thead>
<tr>
<th>Approach #2: Elevate the Discovery Visit Hit Rate</th>
</tr>
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<tbody>
<tr>
<td>Prioritize prospects who are not just wealthy, but also likely to take a visit</td>
</tr>
<tr>
<td>High-Impact Discovery Scheduling</td>
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<table>
<thead>
<tr>
<th>Approach #3: Create “Act Now” Urgency</th>
</tr>
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<tbody>
<tr>
<td>Alter discovery’s “choice architecture” to incentivize MGOs to take action</td>
</tr>
<tr>
<td>Digital Pipeline Nudges</td>
</tr>
</tbody>
</table>

Here, we will turn to elevating the discovery visit hit rate. Increasing the number of cold calls that yield warm leads not only jump-starts conversations with new prospects that will someday lead to major gifts. It also changes MGOs’ attitudes about cold calling, since they are more frequently met with success and thus more likely to undertake the effort in the future.

Source: Advancement Forum interviews and analysis.
At present, professionals across industry, from sales to fundraising, view cold calling with disdain. Nearly two-thirds of salespeople say it’s the part of their jobs that they like least. In higher education advancement, many vice presidents find that their newly hired MGOs are less than eager to do the cold outreach necessary to build portfolios of their own, regardless of their experience in the field.

This reluctance to cold call is understandable. Cold calling is a wildly unproductive endeavor. The low returns that come from outreach to unengaged prospects largely explain the meager fundraising results most MGOs see in their first three years on the job.

Unsurprisingly, a lack of success with cold calling discourages MGOs and makes them less likely to do more cold calling in the future.

Practice 3: Discovery Visit Likelihood Scoring

Elevate the Discovery Visit Hit Rate

**Practice in Brief**

A regression analysis of the common characteristics of prospects who take discovery visits helps MGOs prioritize the warmest uncultivated leads. The higher hit rate on discovery outreach leads MGOs to embrace cold calling as a more fulfilling and high-return activity.

**Problems Addressed**

MGOs often deprioritize cold calling due to the low returns it brings. Rather than spend time reaching out unproductively to unresponsive prospects, they focus their efforts on today’s best donors. Yet this inattention to new prospects depletes tomorrow’s major gift pipeline.

**Diagnostic Questions**

1. Do fewer than 1 in 10 cold call campaigns to new prospects result in a discovery visit?
   
   ___Yes  ___No

2. Does your institution have the internal skills or external budget to analyze data on prospect behaviors?
   
   ___Yes  ___No

3. Are MGOs and/or prospect management staff in the habit of consulting data resources (wealth ratings, propensity scores, engagement scores) to fill portfolios and prioritize outreach?
   
   ___Yes  ___No

*If you answered “Yes” more times than "No," you may wish to prioritize discovery visit likelihood scoring.*

**Institution Profiled**

Bryant University

- Institutional control: Private
- Enrollment: 3,698 (3,462 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Large Suburb (Smithfield, RI)
Bryant University built a discovery visit likelihood score to help their MGOs prioritize discovery prospects who would most likely answer a cold call.

The team at Bryant partnered with advancement data experts to analyze what distinguished a small group of prospects who recently took discovery visits from other prospects in the database. They found that by applying differential weights to variables such as whether the institution had the prospect’s personal email on file, whether the prospect had been a varsity athlete, and whether the institution knew the identity of the prospect’s spouse, the data analysts could estimate the prospect’s likelihood of taking a discovery visit.

The team formulated this visit likelihood into a score from 1 to 20 and assigned a score to all prospects in the database.
Bryant has found that the score has immense predictive value for discovery visits. Of all prospects rated 20 whom MGOs reached out to for visits, 65% said yes.

For some fundraisers on Bryant’s team, this score has shifted attitudes about discovery. Whereas cold calling in the past had been a hit-or-miss effort with many more misses than hits, today MGOs can reach out with confidence that a high percentage of their outreach—in some cases, a majority—will yield productive visits.

From Theory to Practice

"After we rolled out the scores, we had one fundraiser take it to heart and focus on people with higher scores. He landed 46 discovery visits in that time, and 87% of them were with people rated between 15 and 20. That helped us validate the model and prove its effectiveness."

Lisette Clem
Director of Advancement Services
Bryant University

Source: Advancement Forum interviews and analysis.
Practice 4: Social Media Discovery Targeting

Elevate the Discovery Visit Hit Rate

Practice in Brief

Prospects with high levels of engagement with the university on social media are prioritized for qualification visits. MGOs direct cold calling to these individuals, even if they have not engaged with the university through other, more traditional programming, such as events or volunteering. Digital tools assist with collecting social media data.

Problems Addressed

MGOs grow frustrated with low conversion rates on cold calls to prospects who appear otherwise engaged with the institution. Despite a high internal affinity score, few prospects prove willing to meet with fundraisers.

Diagnostic Questions

1. Does your institution have the technology or staffing resources (e.g., student workers, interns) necessary to collect data on social media engagement?
   ____Yes  ____No
2. Does your institution have well-established, popular social media channels that currently host or could host alumni-facing content?
   ____Yes  ____No
3. Do alumni and/or prospects regularly engage with that social media content?
   ____Yes  ____No

If you answered "Yes" more times than "No," you may wish to prioritize social media discovery targeting.

Institution Profiled

Oregon State University

• Institutional control: Public
• Enrollment: 30,354 (25,327 undergraduate)
• Carnegie classification: Research University
• Campus setting: Small City (Corvallis, OR)
While sophisticated predictive models can offer much insight into discovery prospects’ likelihood of taking a visit, a more obvious, immediate, and easy-to-access indicator is going overlooked by most advancement professionals: social media engagement data.

High-net-worth prospects and older individuals have rushed to embrace social media in recent years. They use it not just to connect with family and friends but also to engage with nonprofits and make philanthropic decisions.

For many prospects, a like, comment, or retweet may signal a deeper willingness to engage with a college or university. Yet few institutions strategically mine social media engagement data to find their next big donor.

### A Wealth of Untapped Affinity Data

Social Media Offers a Promising, and Untapped, Frontier in Prospecting

### Major Gift Prospects Turn to Social Media

**High-Net-Worth Prospects and Older Adults Using Social Media**

<table>
<thead>
<tr>
<th>Year</th>
<th>HNW Prospects</th>
<th>50-64-Year-Olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>9%</td>
<td>26%</td>
</tr>
<tr>
<td>2011</td>
<td>32%</td>
<td>46%</td>
</tr>
<tr>
<td>2014</td>
<td>56%</td>
<td>51%</td>
</tr>
</tbody>
</table>

### Finding Fans on Facebook

“If you’re on the university’s page liking, commenting, and sharing posts, wouldn’t it make sense that you’re a fan? It’s not rocket science. But there aren’t many schools right now using social media engagement data to figure out who to reach out to.”

Mark Koenig
Assistant Vice President for Advancement Services
Oregon State University

### Sources:

1) “High-net-worth prospect” is defined as a person with $1M-$5M in net assets excluding primary residence.
2) High-net-worth prospect data indicates Facebook use; 50- to 64-year-old data indicates all social media use.
Oregon State University bucked the trend by using the social media engagement trends of high-net-worth prospects to target discovery outreach.

To evaluate whether a broader rollout was worthwhile, the team at Oregon State conducted a test. They gave a group of MGOs a small pool of discovery prospects and asked them to book visits with them.

Unbeknownst to the MGOs, the pools were composed of two different types of prospects. The first group (the “control group”) had a high affinity rating per Oregon State’s internal model but had not engaged with Oregon State on social media at all. The second group (the “experimental prospects”) had no affinity per Oregon State’s model but were highly engaged on social media.

Advancement leaders at Oregon State hoped to test whether social media engagement might matter more for prospects’ willingness to take a discovery visit than the traditional measures of engagement.
Giving MGOs Easy Wins

Targeting Digitally Engaged Prospects Yields Surprising Visit Rate

“Control Group” Prospects

24% Discovery visit rate

Experimental Prospects

44% Discovery visit rate

Impact by the Numbers

20% Improvement in discovery visit rate

Leaving a Positive Impression on MGOs

“We went and talked to the development officers after this. They said they were honestly surprised by how willing to take their call these prospects were.”

Mark Koenig
Assistant Vice President for Advancement Services
Oregon State University

Social media engagement ultimately counted for a lot when it came to prospects’ willingness to say “yes” to an MGO’s cold call.

Advancement leaders at Oregon State compared the discovery visit “hit rate” for each of the two groups of prospects. They found that prospects who were engaged with Oregon State on social media had a 20-percentage-point better hit rate than the more traditionally engaged prospects.

The ease with which MGOs booked visits with digitally engaged prospects began to change the MGOs’ attitudes about cold calling. Whereas cold calling had yielded discouraging results in the past—and thus was easy to deprioritize—MGOs were happily surprised to find that cold calls under the new model were a worthwhile activity bringing great results.

Source: Advancement Forum interviews and analysis.
Practice 5: Dedicated Discovery Schedulers

Elevate the Discovery Visit Hit Rate

Practice in Brief
Staff members are dedicated to visit outreach and to scheduling meetings with hard-to-reach prospects. These individuals exercise their research skills to identify what an unresponsive prospect might find compelling. They reach out through email and phone with compelling asks and coordinate the scheduling logistics for their MGO colleagues.

Problems Addressed
With so much on their plate, MGOs can spend only a minimal amount of time on cold calling and new prospect outreach. They never develop expertise in the art of the cold call, and their hit rate for discovery outreach never reaches a high enough level to fill their prospect pipeline adequately.

Diagnostic Questions
1. Has a large segment of your prospect population received outreach from MGOs but never responded?
   ___Yes ___No
2. Do MGOs typically use a lightly customized, minimally personalized template for prospect outreach?
   ___Yes ___No
3. Do MGOs struggle to fit cold calling into their workflows?
   ___Yes ___No

If you answered “Yes” more times than “No,” you may wish to prioritize dedicated discovery schedulers.

Institution Profiled
Rochester Institute of Technology
  • Institutional control: Private
  • Enrollment: 16,507 (13,384 undergraduate)
  • Carnegie classification: Research University
  • Campus setting: Large Suburb (Rochester, NY)

Implementation Resource
See p. 129 for the dedicated discovery scheduler job description.
Comparative Advantage in Cold Calling

‘Engagement Specialists’ Take the Burden of Initial Outreach Off MGOs

To raise the discovery visit hit rate, some advancement leaders have opted to take the burden of cold calls off of MGOs.

Rochester Institute of Technology (RIT) did so by hiring two engagement specialists who spend the majority of their time cold calling hard-to-reach prospects and scheduling visits for MGOs.

The engagement specialists have strong communication skills and a knack for prospect research. They craft near-perfect outreach emails tailored to each prospect based on his or her interests, affinities, career paths, and more.

RIT Engagement Specialists
A Profile of the Position

• 2 FTEs
• Sales and admin background
• Each supports a rotating group of three fundraisers
• Conduct research into prospect interests to find “the hook”
• “Pleasantly persistent” outreach
• Key skills
  – Written communication (well-crafted emails)
  – Oral communication (compelling follow-up calls)
  – Prospect research
  – Self-starting, driven, motivated to pursue cold leads

Manage Scheduling Logistics

• Conduct high-volume, multichannel outreach
• Sequence visits to optimize travel efficiency
• Populate MGO calendar invites with key intel

Build Relationships with “Cold” Prospects

• Research affinity and engagement history
• Craft highly personal, meaningful messages
• Serve as initial, pre-qualification point of contact

Source: Advancement Forum interviews and analysis.
Specialization Brings Stronger Results

Expert Schedulers Book Visits at High Rate

Securing Prospect Visits...  ...And Leading to Gifts

378 Meetings scheduled annually  $585K Raised from scheduler-booked visits across past two years

30% Of outreach efforts (to mostly cold prospects) result in a visit  $2.3M Raised from scheduler-booked visits since 2011

Elevating the Visit Hit Rate

“For a lot of these prospects, we’ve reached out seven times all different ways, and it’s never worked. We have contact reports that show attempt after attempt. They’re passed from one fundraiser to the next year after year, and we hear nothing back. That is, until we put an engagement specialist on it. They’ve gotten in with prospects no one else could reach.”

Lisa Cauda, Vice President, Development and Alumni Relations
Rochester Institute of Technology

The amount of time the engagement specialists are able to spend on cold calling has allowed them to develop expertise in the area. This comparative advantage helps them win mindshare among the least responsive constituents.

Mindshare translates into visits. Engagement specialists schedule nearly 400 visits annually, and 30% of their attempts to contact prospects who have long ignored outreach from the university meet with success.

Many of these visits culminate in major gifts. Across the past two years, visits from the program have brought in more than half a million dollars.

Advancement leaders at RIT attribute their success to the expert touch the engagement specialists bring to outreach. Thanks to their efforts, RIT has begun to increase prospect coverage among assigned but unresponsive prospects.

Source: Advancement Forum interviews and analysis.
## Increasing Prospect Coverage

### Three Approaches to Boost the Pace of Discovery Activity

| **Approach #1:** Increase Confidence in Prospect Potential |
| Rethink assignment protocols to focus on verified warm prospects |
| Pre-Qualification Prospect Referrals |

| **Approach #2:** Elevate the Discovery Visit Hit Rate |
| Prioritize prospects who are not just wealthy, but also likely to take a visit |
| High-Impact Discovery Scheduling |

| **Approach #3:** Create “Act Now” Urgency |
| Alter discovery’s “choice architecture” to incentivize MGOs to take action |
| Digital Pipeline Nudges |

The final approach detailed here will touch on how advancement leaders can combat the tyranny of the immediate.

Nudging gift officers toward the pipeline ultimately helps them manage their workflows and make room for pipeline activities among today’s short-term pursuits.

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Source: Advancement Forum interviews and analysis.
The ‘Tyranny of the Immediate’

MGOs Evaluated on Short-Term Production, Not Pipeline Cultivation

For most advancement shops, the immediate exerts a tyrannical influence over MGO workflows. At the individual level, MGOs increasingly must meet visit, dollar, and proposal goals. These personal incentives direct their time and attention toward today’s best prospects. Often, tomorrow’s pipeline falls outside their evaluation rubric.

Even at shops that measure and evaluate MGOs based on pipeline metrics, the pressure to raise unprecedented amounts pushes the leadership team to deprioritize pipeline activity. If an MGO hits her dollars-raised goal but ignores discovery, few chief advancement officers are willing to take action for fear of hurting the shop’s overall performance.

**New Prospects Ignored in MGO Metrics**

*Percentage of Shops Reporting Use of Metric, 2014*

<table>
<thead>
<tr>
<th>Metric</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of in-person visits</td>
<td>93%</td>
</tr>
<tr>
<td>Total dollars raised</td>
<td>91%</td>
</tr>
<tr>
<td>Number of major gift proposals made</td>
<td>87%</td>
</tr>
<tr>
<td>Number of discovery visits made</td>
<td>39%</td>
</tr>
<tr>
<td>Number of new prospects identified</td>
<td>32%</td>
</tr>
<tr>
<td>Number of cold calls made</td>
<td>9%</td>
</tr>
</tbody>
</table>

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**An Unsustainable Path Forward**

“My biggest fear? It’s that our frontline fundraisers are grabbing all the low-hanging fruit this year and not cultivating for the future. Yes, we have metrics in place for qualifications, but we don’t enforce them if the officer hits all her other goals. I worry we’ll start with a blank canvas next year, that we’ll ‘call in all our favors’ and be left with no one on deck. We’re jeopardizing our long-term fundraising potential by being so focused on right now.”

**Assistant Vice President for Development**

**Public Research University**

Practice 6: Digital Pipeline Nudges

Create “Act Now” Urgency

Practice in Brief
Tech tools “nudge” gift officers to engage their pipeline prospects. MGOs receive updates and new prospect recommendations through both a mobile and desktop platform. The tools take the best of the tech world (e.g., Amazon recommendations, Facebook newsfeed) and adapt it for major gift fundraising.

Problems Addressed
Many MGOs intend to actively engage their new prospects but cannot find time in their busy days to do so. Their good intentions are overwhelmed by the tyranny of the immediate, and without tools to structure and guide their workflows, they default to focusing primarily on prospects they already know.

Diagnostic Questions
1. Do MGOs struggle to find time in their day to focus on new prospects and discovery outreach?
   ___Yes ___No

2. Have pipeline metrics (e.g., discovery visit goals) failed to redirect MGO attention toward the pipeline?
   ___Yes ___No

3. Does your staff have the capacity or resources to build, commission, or purchase from a vendor “nudge” tools for MGOs?
   ___Yes ___No

*If you answered “Yes” more times than ”No,“ you may wish to prioritize digital pipeline nudges.*

Institution Profiled
University of Southern California
- Institutional control: Private
- Enrollment: 43,871 (18,794 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Los Angeles, CA)
The principles of behavioral economics, long a staple of the commercial and tech worlds, have begun to make their way into MGO management strategies.

The “nudge”—a behavioral economics strategy of presenting choices in ways that subtly influence the ultimate decision a user or customer makes—has shaped the way commercial organizations build their customer experiences. Especially in the world of technology, most users’ interactions with organizations are mediated by carefully designed nudges leading them to opt for certain products and options, from songs (Spotify) to consumer goods (Amazon) to movies and TV series (Netflix).

Advancement leaders and MGO managers have begun to explore how they can take the nudge principle and use it to influence the decisions their fundraisers make about how to spend their time. Doing so will mean abandoning big lists of newly assigned prospects in favor of automated prompts, a small number of action items, and recommendations personalized to the individual.

Source: Advancement Forum interviews and analysis.
The University of Southern California’s (USC) advancement team deployed the nudge principle in MGO management when it designed a mobile newsfeed for pipeline updates and portfolio maintenance.

The newsfeed runs on MGOs’ Salesforce app. The prompts it provides sync with prospects’ cultivation stages and allow MGOs to reach out with a single click of a “call” or “email” button.

The system automatically generates talking points that prospects will find relevant and encourages MGOs, where applicable, to remove “stale” prospects from their portfolio. Doing so keeps their attention focused on the highest-priority prospects they could cultivate.

1. **Synchronized with Cultivation**
   “…likely to make a gift in the next six months...”
   Prompts are programmed to appear at key moments in cultivation cycle

2. **One-Click Actions**
   Buttons allow MGOs to act immediately

3. **Automated Talking Points**
   “…mention the public policy seminar...”
   Back-end coding connects prospect interests with discussion opportunities

4. **Portfolio Hygiene Too**
   MGOs are prompted to remove inactive prospects, as well as contact new ones†

---

† Currently in development

Source: Advancement Forum interviews and analysis.
The desktop counterpart to USC’s mobile newsfeed moves even further in the direction of pipeline nudges. When MGOs look up a prospect on their computers, the system automatically recommends prospects that they “may be interested in.”

Here, the same sort of recommendation system that powers the biggest tech companies in the world is expanding MGOs’ sights beyond their most reliable prospects.

Algorithm bases suggestions on browsing behavior

Two suggestions at a time avoids overwhelming MGO

Key information (estimated capacity, location) previewed on prospect page

Likelihood to give helps MGOs prioritize follow-up

Your Next Big Donor, c/o Predictive Analytics

Machine Learning Suggests ‘Prospects You May Be Interested In’

University of Southern California’s Salesforce Platform

1) Currently in development

Source: Advancement Forum interviews and analysis.
Instructions:
Based on your institution's goals and available resources, use the chart below to map out which of the tactics profiled in this section you would like to prioritize. Use this document to assess viability and determine next-steps.

<table>
<thead>
<tr>
<th>Tactic</th>
<th>My Institution Should Prioritize This Tactic</th>
<th>Notes and Next-Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alumni Relations Prospect Referral Form</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Marquette University</em></td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Alumni relations staff record key intel about their interactions with prospects to send to prospect research for review and assignment.</td>
<td>Disagree Agree</td>
<td></td>
</tr>
<tr>
<td><strong>Student Caller Lead Generation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>University of Michigan</em></td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Top-performing student callers contact highly rated, unassigned prospects to gauge their philanthropic interest and pass leads to major gift officers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Discovery Visit Likelihood Scoring</strong></td>
<td></td>
<td></td>
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<tr>
<td><em>Bryant University</em></td>
<td>1 2 3 4 5</td>
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<tr>
<td>A regression analysis of the common characteristics of prospects who take discovery visits helps MGOs prioritize the warmest uncultivated leads.</td>
<td></td>
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<tr>
<td><strong>Social Media Discovery Targeting</strong></td>
<td></td>
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<tr>
<td><em>Oregon State University</em></td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Prospects with high levels of engagement with the university on social media are prioritized for qualification visits.</td>
<td></td>
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<td>Tactic</td>
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<td>-------------------------------------------</td>
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</tr>
<tr>
<td><strong>Dedicated Discovery Schedulers</strong></td>
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<td><em>Rochester Institute of Technology</em></td>
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<td>Staff members are dedicated to visit outreach and scheduling meetings with hard-to-reach prospects.</td>
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<td><strong>Digital Pipeline Nudges</strong></td>
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<tr>
<td><em>University of Southern California</em></td>
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<tr>
<td>Tech tools “nudge” gift officers to engage their pipeline prospects.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
Accelerating Portfolio Churn
In this section, we’ll focus on high-potential prospects who are not currently assigned to major gift officers. These unassigned prospects, comprising on average 54% of an institution’s high-potential prospect population, have high net worth and are likely to give if cultivated. Yet no cultivation occurs due to the lack of MGO ownership and accountability. Without a space in a portfolio, these prospects will never reach their true philanthropic potential.

Source: Advancement Forum interviews and analysis.
Bottlenecks in the Pipeline

Stagnant Portfolios Impede Efforts to Capitalize on Discovery Gains

At most institutions, bottlenecks in the pipeline account for the large number of prospects sitting outside of portfolios. There simply isn’t any room in portfolios to accommodate them.

Even more so, the lack of churn within most portfolios means that advancement teams can never turn their sights to these overlooked prospects. In many cases, MGOs carry the same prospects in their portfolios for the duration of their employment at the institution. Indeed, in a small sampling of EAB members, the average length of time prospects had been assigned nearly matched the national average for MGO tenure.

Expanding Coverage Is Just the Start

Current Prospect Management Strategy Limits Pipeline Development

- **Increased Outreach**
  - MGOs reach out to more uncontacted, unvisited prospects

- **Few Disqualifications**
  - Slow rate of disqualification limits further discovery

- **Missed Cultivation Opportunities**
  - One-off visits don’t lead to cultivation strategy

- **Long Time Horizon to Ask**
  - Good prospects visited for years, never approaching ask

---

### Slow Portfolio Churn Constrains Growth

“We got our gift officers to start seeing more of their portfolios, but there was so little follow-through it was almost like it didn’t matter. They’d find people to take visits, and they’d hit their visit goals, but the wheels were spinning and we weren’t going anywhere. We weren’t working through who we had and moving onto the next best opportunity.”

*Associate Vice President for Development*
*Private Master’s University*

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Many advancement leaders believe that stagnancy within portfolios stems solely from a lack of portfolio penetration. They think that increasing the rate at which MGOs reach out to their assigned prospects and go on discovery visits will automatically lead to more churn.

Yet that does not always prove to be the case. Institutions that increase the rate of cold calling, discovery, and qualification can still fall prey to three risks that threaten to undermine portfolio churn.

First, MGOs can attempt contact endlessly, or meet with discovery prospects, without necessarily disqualifying those prospects who do not have short-term major gift potential.

Second, productive qualification visits may still result in stagnant portfolios if MGOs let prospects linger for months or years without meaningful moves and an aggressive cultivation strategy.

Lastly, even a well-managed series of moves can drag on for years without a proactive ask timeline. Long time horizons leading up to the ask may run past an MGO’s departure from the institution, and when a new MGO comes in, the institution must hit “reset” on the relationship.

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Source: Advancement Forum interviews and analysis.
This section explores three approaches that best practice institutions are using to accelerate portfolio churn.

Advancement leaders who destigmatize disqualification reframe it as a productive move contributing not only to portfolio hygiene but also to major gift success.

Those who hardwire cultivation next-steps ensure that MGOs formulate a path from a productive discovery visit to a major gift proposal—and begin orchestrating the series of moves that will get the prospect there.

Lastly, some advancement shops have begun time-boxing the cultivation cycle to ensure that MGOs can realistically engage their whole portfolio over the few years they may be in seat.

We begin here with destigmatizing disqualifications.
A Significant Reluctance to Disqualify

MGOs Hold onto Discovery Prospects, Even Without Active Management

Four Root Causes of Slow Disqualifications

Endless Optimism

“Our MGOs just keep thinking, ‘One more try, one more try.’ They’re optimistic but it ends up cluttering the portfolio.”

Fear of Prospect Neglect

“We got a surprise $15,000 gift—it turns they got dropped when an MGO left, and we forgot about them.”

The “Endowment Effect”

“If I tried to give them the same people as new leads, they wouldn’t care—but they can’t let them go.”

Portfolio Territorialism

“Our fundraisers may not have ever contacted their prospects, but they still think of them as ‘theirs.’”

MGOs often shy away from disqualifying prospects. They do so for a number of reasons.

The endless optimism that drives MGO success can also lead them to pursue engagement with unresponsive prospects past the point of reason. The eighth email might stand a chance of landing a visit. The one-hundredth, less so.

A fear of prospect neglect also disinclines MGOs toward disqualification. For a prospect who may have major gift capacity in five or seven years, it seems to make more sense to hold onto him or her in an over-full portfolio rather than release that prospect into the ether of the donor database and risk everyone forgetting about them.

The endowment effect also contributes strongly to disqualification’s unfavorable reputation. The endowment effect is a behavioral economics theory positing that people ascribe more value to things they already have than those same things if they didn’t already have them. When it comes to MGOs, that means they view their assigned prospects more favorably than they would if they weren’t already assigned to them.

Lastly, a prevailing sense of portfolio territorialism leads many MGOs to guard their assigned prospects against any wayward AVP who would take them and reassign them, even if the MGO has no plans to actively cultivate them.

Source: Advancement Forum interviews and analysis.
Practice 7: ‘Reasonable Attempt’ Contact Criteria

Destigmatize Disqualification

Practice in Brief
MGOs make two attempts to contact discovery prospects through two channels for four consecutive quarters. If prospects are still unresponsive at that time, MGOs disqualify them and move on to new, and potentially higher-inclination, prospects.

Problems Addressed
MGOs keep high-net-worth prospects in their portfolios for years, even if their outreach attempts have never met with success. Their seemingly endless optimism leads them to believe one more email or voicemail will elicit a response. Yet their persistence and tenacity mean that better prospects never find a spot in their portfolios.

Diagnostic Questions
1. Is the average amount of time assigned prospects at your institution have been in portfolios greater than three years?
   - Yes ___No ___

2. Do MGOs continue to hold onto unresponsive prospects after more than a year of outreach attempts?
   - Yes ___No ___

3. Is there a large number of high-net-worth prospects awaiting assignment at your institution?
   - Yes ___No ___

If you answered “Yes” more times than “No,” you may wish to prioritize “reasonable attempt” criteria.

Institution Profiled
George Washington University
- Institutional control: Private
- Enrollment: 27,159 (11,504 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Washington, DC)
George Washington University (GWU) sought to rein in some of the tendencies that diminished disqualifications by establishing reasonable attempt criteria for outreach.

Advancement leaders asked MGOs to make a reasonable attempt every year to contact 100% of their assigned discovery prospects.

They further clarified what constituted a reasonable attempt—and they did so in a way that limited MGOs’ endless optimism. Advancement leaders defined a reasonable attempt as two attempts at contact through two channels each quarter for four consecutive quarters.

MGOs who meet those criteria and still have not heard back from their prospects disqualify them or code them as “not a prospect now.”

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**Source:** Advancement Forum interviews and analysis
Minimizing the Fear of Disqualification

Reasonable Attempt Criteria Overcome MGO Hesitation

More Movement into—and Out of—the Pipeline

3,200 Qualification contact attempts of managed prospects last year

23% Increase in disqualifications

Growth in number of prospects in cultivation

Increase in number of prospects in solicitation

Focus Shifts to Best Prospects

“The ‘reasonable attempts’ criteria allow us to help MGOs move to better prospects by quantifying unresponsiveness. Rather than continuing to hold high-capacity prospects who show no interest in meeting with us in their portfolios, fundraisers can focus on higher-inclination prospects. Though these prospects may have lower immediate capacity, they are more willing to engage and therefore may ultimately give more over time. As a result, we are seeing numbers in the cultivation and solicitation stages increase.”

Anne Dean
Director, Research & Relationship Management
George Washington University

The reasonable attempt criteria have led to a spike in productive disqualifications at GWU. The number of disqualifications rose 23% between 2015 and 2016.

Disqualifying prospects has allowed MGOs to turn their sights on higher-inclination prospects who had not yet found a spot in their portfolios. These prospects move more quickly into cultivation and solicitation, yielding promising gains for GWU.

Source: Advancement Forum interviews and analysis.
Practice 8: Automatic Prospect Sunsetting System

Destigmatize Disqualifications

Practice in Brief
Prospects whom MGOs do not engage successfully at least once every six months are removed from portfolios. Every automatically sunset prospect leads to the MGO’s unit losing an incentive pay point.

Problems Addressed
MGOs allow assigned prospects to sit in their portfolios without active engagement. In particular, unresponsive prospects with little major gift potential portfolio space that could instead go to a higher-propensity prospect.

Diagnostic Questions
1. Does your central prospect management team have the authority to remove prospects from MGOs’ portfolios?
   ____Yes  ____No

2. Do MGOs engage their assigned prospects once a year or less?
   ____Yes  ____No

3. Does your institution use incentive pay for fundraisers?
   ____Yes  ____No

If you answered "Yes" more times than "No," you may wish to prioritize an automatic prospect sunsetting system.

Institution Profiled
Colorado State University
- Institutional control: Public
- Enrollment: 31,856 (25,177 undergraduate)
- Carnegie classification: Research University
- Campus setting: Midsize City (Fort Collins, CO)
At Colorado State University, a prospect sunsetting system incentivizes MGOs to embrace disqualification. MGOs must log a successful contact with all of their assigned prospects every six months. If they reach the three- and five-month marks without a successful contact, an automated email reminds them to reach out. If a prospect goes six months without actively engaging with an MGO, and if that MGO hasn’t manually taken the prospect out of his or her portfolio, then the central advancement team sunsets the prospect.

MGOs who lose prospects to automatic sunsetting likewise lose incentive pay points. The financial incentive leads many MGOs to actively engage more prospects and move out of their portfolios those who don’t merit cultivation.

The Consequences of Inaction

“One unit lost 30 points in the first year of the program, which knocked them out of the incentive program. People noticed that. That changed behavior quickly.”

Rudy Garcia
Senior Associate Vice President for Advancement Operations
Colorado State University

Source: Advancement Forum interviews and analysis.
Automatic sunsetting has led to a mindset shift at Colorado State. The number of manually disqualified prospects climbed by more than 600 over the two-year span that the incentives have been in place. Disqualifying prospects has helped MGOs focus on higher-inclination prospects. This focus has supported top-line fundraising growth as well as major gift success at the institution.
Practice 9: Discovery Officer Referral Process

Destigmatize Disqualification

Practice in Brief
Unresponsive major-gift prospects are handed off to discovery officers for additional follow-up. The discovery officers have greater bandwidth to persistently continue the outreach process and often land visits with hard-to-reach prospects. The institution’s discovery goals are met, while MGO portfolios are freed up for new prospects.

Problems Addressed
MGOs recognize that keeping unresponsive prospects in their portfolio may not be a great use of their time. Yet they fear that disqualifying these high-net-worth individuals would lead the institution to entirely overlook them in the future. Without ownership or accountability, they will go neglected even if their inclination increases.

Diagnostic Questions
1. Do MGOs express a fear that prospects they disqualify will be overlooked by the institution?
   ___Yes       ___No

2. Are MGOs at your institution making slow progress on their discovery goals?
   ___Yes       ___No

3. Does your institution have the resources to hire at least one discovery officer?
   ___Yes       ___No

If you answered “Yes” more times than “No,” you may wish to prioritize a discovery officer referral process.

Institution Profiled
Northern Kentucky University
• Institutional control: Public
• Enrollment: 14,542 (12,380 undergraduate)
• Carnegie classification: Master's University
• Campus setting: Large Suburb (Highland Heights, KY)
Focusing on Handoffs, Not Disqualifications

Discovery Officers Take On Outreach to the Unresponsive

Northern Kentucky University (NKU) grappled with MGOs’ reluctance to disqualify prospects by creating a pathway out of a portfolio to more productive active management. They did so by focusing on handoffs rather than disqualifications.

In years past, MGOs whose outreach attempts were met with radio silence faced one of two options. They could continue reaching out and potentially waste time that could be spent engaging higher-inclination prospects, or they could give up and possibly miss out on a prospect who was one email or one phone call away from responding positively.

Advancement leaders at NKU deconstructed this dichotomy. They hired a small staff of three discovery fundraisers who took unresponsive prospects from MGOs and continued following up with them.

Downward referrals free up MGOs’ time to focus on their best prospects today. At the same time, the referrals ensure that the institution continues engaging high-potential prospects who may not yet be ready to take a visit.

Source: Advancement Forum interviews and analysis.
A High-Efficiency Discovery Machine
Discovery Officers Break Through to Unresponsive Prospects

Persistent Outreach Brings Visits at Northern Kentucky University

3,600+ Pipeline prospects receive contact attempts annually
720 Average total annual visits with pipeline prospects

Streamlining Pipeline Development
"There’s a math equation I use to justify the budget for discovery officers. We have 65,000 alumni of record, and I figure that 10% of them can make a major gift. That’s 6,500 alumni. When I first arrived here, we had four gift officers managing 450 people. At that rate, it would take me 17 years to get to everyone. Our discovery officers help us move more quickly through all our potential donors.”

Eric Gentry
Vice President of University Advancement
Northern Kentucky University

Discovery officers at NKU cover a lot of ground. They attempt to contact more than 3,600 prospects annually, and they land visits with upwards of 720 of them.

Their high-volume, high-velocity approach to outreach and visits ensures successful engagement of the next tier of the pipeline.

It also creates a safety net for disqualification. MGOs no longer have to struggle to decide whether to continue outreach attempts or give up and move on. Instead, they can opt for the third way, handing off outreach to the discovery officer.
A successful qualification visit does not necessarily mean that cultivation will follow. At many institutions, MGOs regularly miss opportunities to capitalize on momentum with prospects.

In this section, we will discuss how some institutions have helped MGOs hardwire cultivation next-steps and develop cultivation strategies for all of their assigned prospects.

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**Accelerating Portfolio Churn**

Expediting Prospect Movement to Expand Pipeline Coverage

**Destigmatize Disqualifications**
Elevate MGO comfort with moving prospects out of portfolios

**Hardwire Cultivation Next-Steps**
Ensure strategy formation follow-through after productive discovery visits

**Expedite the Ask**
Shorten the fundraising lifecycle by time-boxing cultivation stages

Jane Q. Fundraiser’s Portfolio

1. **Discovery**
2. **Cultivation**
3. **Solicitation**
4. **Gift**
Visits Without Cultivation?

Few Institutions Enforce Follow-Through

“In many cases, managers don’t require fundraisers to have a formal plan to solicit every prospect in their respective portfolios. Indeed, I’ve come across only a small handful of organizations that require fundraisers to codify a formal solicitation strategy for each assigned prospect. Yet this should be the fundamental purpose of assignment.”

David Lively
Senior Associate Vice President of Alumni Relations and Development Northwestern University

For many advancement shops, an MGO visit is not synonymous with cultivation. Having a prospect in the portfolio, or even conducting a qualification visit with that prospect, often does not lead to the formulation of a proactive strategy for bringing that prospect to the ask.

The reliance of many shops on a face-to-face visit metric when evaluating fundraisers has exacerbated this problem. Fundraisers seek to maximize the number of face-to-face visits, even if those visits are “shallow” and lacking a cohesive cultivation strategy that will culminate in an ask.

Advancement leaders increasingly wonder how they can incentivize not only visits, but also substantive cultivation, using their metric systems.

Sources: David Lively, Managing Major Gift Fundraisers (CASE, Washington DC: 2017), 13; Advancement Forum interviews and analysis.
Practice 10: Stage-Change Metrics

Hardwire Cultivation Next-Steps

Practice in Brief

Advancement leaders evaluate and reward MGOs based on how many prospects they are able to move from one cultivation stage to the next. Movement between stages involves not only a code-switch in the database but also the formulation of a cultivation strategy and initial steps to execute on it.

Problems Addressed

Visit metrics are ubiquitous across higher ed advancement. At many institutions, they contribute to unproductive behaviors. MGOs will visit prospects every six to twelve months to hit a visit goal, but they will not formulate a cultivation strategy for advancing toward a solicitation. Without a strategy in place, prospects linger in portfolios and keep new prospects from being cultivated.

Diagnostic Questions

1. Does your institution evaluate MGOs based on the number of in-person visits they complete?
   
   ___Yes  ___No

2. Do many prospects whom MGOs visit linger for years without a solicitation?
   
   ___Yes  ___No

3. Do MGOs struggle to formulate a cultivation strategy and estimate an ask date for more than 50% of their assigned prospects?
   
   ___Yes  ___No

If you answered “Yes” more times than “No,” you may wish to prioritize stage-change metrics.

Institution Profiled

Ithaca College

- Institutional control: Private
- Enrollment: 6,678 (6,221 undergraduate)
- Carnegie classification: Master’s College
- Campus setting: Small Suburb (Ithaca, NY)
Ithaca College realized recently that much of their prospect activity led nowhere. MGOs would visit with prospects but not follow up for six months or a year. These MGOs consistently hit their visit goals, but they did little to move their prospects toward an ask.

To remedy this, the team at Ithaca developed stage-change metrics for their MGOs. While visits continue to play a role in MGO evaluations, it’s a smaller one than previously.

Stage changes, on the other hand, play a far larger role. MGOs are rewarded for every time they move a prospect from qualification into cultivation (and from cultivation into solicitation). Moving a prospect into cultivation entails not only a database code—the MGO must also formulate a cultivation strategy and begin targeting an ask date.

### Ithaca College’s Stage-Change Metrics

<table>
<thead>
<tr>
<th>Deemphasize Visit Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downplay one-off visits that do not meaningfully advance cultivation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reward Moves into Cultivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track number of prospects who move from “qualification” to “cultivation” in donor management system</td>
</tr>
</tbody>
</table>

- Have we built a **cultivation strategy**?
- Have we set an expected **ask date**?
- Have we secured **follow-up visits**?
- Have we engaged **campus partners**?

---

Source: Advancement Forum interviews and analysis.
Ithaca is just now implanting the stage-change metrics. They hope that the new metrics will shift the distribution of prospects in portfolios.

Prior to the new system, most prospects were in discovery. Ithaca would like to bring the discovery portion down to just a quarter of each officer’s portfolio. And they aim to increase the share in cultivation up to one-half of the full portfolio.
Practice 11: Pipeline Cultivation Metrics

Hardwire Cultivation Next-Steps

Practice in Brief
Advancement leaders redesign the metrics system they use to evaluate MGO performance. The new system incentivizes MGOs to perform key pipeline development activities, such as assigning wealth ratings to prospects and creating cultivation strategies.

Problems Addressed
With such an intense focus on the amount of money MGOs raise each year, many institutions find they underemphasize the fundamental pipeline activities necessary to support long-term performance. MGOs focus their efforts on a few high-potential prospects while under-cultivating the rest of their portfolios.

Diagnostic Questions
1. Does your advancement shop currently use or plan to use a metrics system to evaluate MGO performance?
   ___Yes ___No

2. Have MGOs qualified or assigned a wealth rating to fewer than 3 out of 4 prospects in their portfolios?
   ___Yes ___No

3. Have MGOs developed a formal cultivation plan for fewer than 3 out of 4 prospects in their portfolios?
   ___Yes ___No

If you answered “Yes” more times than “No,” you may wish to prioritize pipeline cultivation metrics.

Institution Profiled
University of Southern California
- Institutional control: Private
- Enrollment: 43,871 (18,794 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Los Angeles, CA)
USC likewise overhauled their fundraiser metrics to hardwire cultivation next-steps. To ensure that MGOs were not only visiting their prospects but also developing cultivation strategies for them, USC began tracking and rewarding strategy formation and fundraiser-assigned capacity ratings.

MGOs at USC must develop cultivation strategies and assign a potential capacity range to 75% of their assigned prospects. These metrics complement the other performance indicators for MGOs at USC, including qualifications (and disqualifications), visits, and dollars raised.

Source: Advancement Forum interviews and analysis.
To add an extra social incentive to the MGO performance metrics, advancement leaders at USC plot out fundraiser performance on a monthly basis in an internally distributed chart. This scatterplot visually demonstrates the productivity of the fundraisers within each unit.

The scatterplot captures both dollars raised as well as performance against USC’s pipeline metrics. The vertical axis in the graph shows how much the fundraiser has raised. The horizontal axis shows progress toward fulfilling the pipeline metric expectations.

Accounting for both dollars raised as well as pipeline performance recognizes development officers who achieve balance in their cultivation strategies. It also illustrates the strong correlation between pipeline activity and total dollars raised.
Practice 12: Plug-and-Play Cultivation Guide

Hardwire Cultivation Next-Steps

**Practice in Brief**

A lengthy, comprehensive manual for MGOs lists recurring cultivation opportunities across campus. The document streamlines cultivation planning by connecting prospect interests with existing opportunities and allowing MGOs to avoid having to surface new cultivation opportunities every time they want to formulate a strategy for a prospect.

**Problems Addressed**

Cultivation plans are labor-intensive documents to compile. Often, MGOs find themselves having to reinvent the wheel by tracking down cultivation opportunities across campus every time they want to put together a strategy for a new prospect. Consequently, strategy formation occupies a large share of MGOs’ time, limiting the number of prospects for whom MGOs can compile a strategy.

**Diagnostic Questions**

1. Do MGOs express frustration with the amount of time that cultivation planning takes?  
   ___Yes      ___No

2. Does your campus feature recurring events or opportunities to engage prospects?  
   ___Yes      ___No

3. Does a member of your staff have the capacity to catalog these recurring cultivation opportunities?  
   ___Yes      ___No

*If you answered "Yes" more times than "No," you may wish to prioritize a plug-and-play cultivation guide.*

**Institution Profiled**

Marquette University

- Institutional control: Private
- Enrollment: 11,294 (8,238 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Milwaukee, WI)

**Implementation Resource**

See p. 132 for the plug-and-play cultivation guide template.
Hard to Budget Time for Cultivation Planning

MGOs Reinvent the Wheel with Each New Strategy, Limiting Reach

To better hardwire cultivation next-steps, advancement leaders must contend with the biggest barrier fundraisers face to cultivation planning: time.

Developing a cultivation strategy for each prospect takes a large amount of time. Fundraisers must survey the landscape of upcoming events and willing on-campus partners to identify potential moves, manage the logistics of donor visits, and market these opportunities to the individuals in their portfolios.

Today, MGOs have less time than ever to undertake this work. The amount of time they spend on frontline fundraising falls far below expectations, as other on-campus duties call them away.

The large necessary time investment of cultivation paired with a rapidly diminishing pool of discretionary time means that most fundraisers can hardwire cultivation next-steps only for a slim segment of their assigned prospects. Consequently, many prospects languish in a portfolios with only occasional, and questionably meaningful, cultivation touches.

“A Lot of Pre-Cultivation Work…”

Find relevant upcoming events
Create new events from scratch
Recruit academic partners
Write previews of events and programs
Compile programs into cultivation plan

“…And Less Time Than Ever to Do It”

MGOs’ Intended and Actual Time Dedicated to Frontline Fundraising, 2014

<table>
<thead>
<tr>
<th>Time Allocation</th>
<th>Intended</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>76%+ of their time</td>
<td>36%</td>
<td>65%</td>
</tr>
<tr>
<td>51%-75%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>50% or Less</td>
<td>16%</td>
<td>33%</td>
</tr>
</tbody>
</table>

“…but “busy work” abounds”

“Good intentions...”

“Our MGOs told us they were spending too much time coordinating and planning, and it was taking up the time they could spend with donors.”

Ed Magro
Executive Director of Development
Bryant University
Marquette University aimed to streamline cultivation planning by developing a plug-and-play cultivation manual. Their "Activate Your Prospects" guide gives fundraisers a menu of prepackaged moves they can use with assigned prospects.

The guide pulls recurring engagement opportunities from all across campus and includes the contact information for the point-people coordinating the offerings. Fundraisers receive training during onboarding on how to use the guide, and they integrate it into their daily workflows.

This one-stop shop for cultivation minimizes the time that MGOs must invest in cultivation planning, thereby freeing them up to actively engage more assigned prospects.
Practice 13: Cultivation Concierge

Hardwire Cultivation Next-Steps

Practice in Brief
A dedicated staff member takes the lead on identifying cultivation opportunities and coordinating planning for when prospects are on campus. MGOs shift their focus from cultivation planning to execution.

Problems Addressed
MGOs spend a minority of their time on frontline fundraising due to how long it takes to coordinate cultivation for each individual prospect in their portfolio. With so much time invested in so few prospects, MGOs find they are unable to effectively cultivate a broader segment of their assigned prospects.

Diagnostic Questions
1. Do MGOs at your institution spend less than 75% of their time on frontline fundraising?
   ___Yes    ___No

2. Does a critical mass of prospect meetings or meaningful moves occur on campus?
   ___Yes    ___No

3. Does a member of your staff have the capacity to take on a part-time role as a liaison to on-campus partners who can participate in cultivation?
   ___Yes    ___No

*If you answered “Yes” more times than “No,” you may wish to prioritize a cultivation concierge.*

Institution Profiled
Bryant University
- Institutional control: Private
- Enrollment: 3,698 (3,462 undergraduate)
- Carnegie classification: Master’s University
- Campus setting: Large Suburb (Smithfield, RI)
Bryant University is moving in a similar direction as Marquette on cultivation planning. Instead of providing fundraisers with a self-service menu of moves for prospects, advancement leaders are designating a single staff member as an in-house cultivation concierge.

The director of donor relations will serve as this cultivation concierge. This staff member will identify on-campus cultivation opportunities, recruit campus partners to participate, and curate and design the menu of cultivation offerings—all tasks that previously fell to frontline fundraisers.

When MGOs wish to bring a prospect or donor back to campus, they simply have to touch base with the cultivation concierge about an opportunity, invite their prospect or donor, and attend the event.

This strategy frees up MGOs’ time to focus on frontline fundraising rather than coordinating cultivation.
Practice 14: Prospect Interaction Metrics

Hardwire Cultivation Next-Steps

Practice in Brief
In addition to in-person visits, MGOs are rewarded for one-way outreach and significant two-way exchanges with prospects through remote channels (email, phone, text message, videoconference, etc.). These metrics incentivize broad, comprehensive activity across the portfolio, as well as cultivation that aligns more closely with some prospects’ aversion to in-person meetings early in the cultivation cycle.

Problems Addressed
Prospects are proving more reluctant to take in-person visits with frontline fundraisers prior to establishing a relationship with them. Their time is their most precious commodity, and an ask for time is difficult for them to say “yes” to. MGOs, too, struggle with time. The time it takes to travel for an in-person visit imposes constraints on how many prospects they can meaningfully cultivate in any given year. Consequently, much of their portfolios goes under-cultivated, since MGOs do not have the time to meet individually with everyone assigned to them.

Diagnostic Questions
1. Do MGOs at your institution struggle to stay in touch with prospects in between visits?
   ___Yes ___No
2. Does discovery visit outreach have a success rate lower than 5%?
   ___Yes ___No
3. When MGOs travel, do they struggle to book pipeline visits to complement their anchor visit?
   ___Yes ___No

If you answered “Yes” more times than “No,” you may wish to prioritize prospect interaction metrics.

Institution Profiled
University of California, Santa Cruz
- Institutional control: Public
- Enrollment: 18,783 (16,962 undergraduate)
- Carnegie classification: Research University
- Campus setting: Small City (Santa Cruz, CA)
Beyond ‘Visit or Nothing’

Donors and MGOs Seek New Model for Lighter-Lift Cultivation

Donors Busier Than Ever

“I’m struggling with my old-school, die-hard, ‘there’s nothing like a face-to-face visit’ mentality. Because the reality today is that people are busier than ever, and getting a face-to-face visit is more difficult. I’m wondering if we can use remote interactions more effectively to build relationships.”

Jeff Shilling
Associate Vice Chancellor, Philanthropy
University of California, Santa Cruz

Cash-Rich, Time-Poor

% of Respondents with Enough Time to Accomplish Daily Goals, Gallup 2011

<table>
<thead>
<tr>
<th>Income Range</th>
<th>% of Respondents with Enough Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $24K</td>
<td>77%</td>
</tr>
<tr>
<td>$24K-$59K</td>
<td>75%</td>
</tr>
<tr>
<td>$60K-$89K</td>
<td>72%</td>
</tr>
<tr>
<td>More than $90K</td>
<td>70%</td>
</tr>
</tbody>
</table>

MGOs Look for Ways to Do More Too

52% Of MGOs say they don’t have enough time to get it all done

50% Of MGOs say their visit-or-nothing qualification model constrains fundraising

Time acts as a capacity constraint for MGOs in a number of ways. Not least of those is the time an MGO has to invest in in-person visits.

In-person visits can take up multiple days in an MGO’s calendar. While the ideal cultivation trip involves multiple visits with a wide array of discovery prospects, prospects currently being cultivated, and donors in stewardship, often MGOs experience low- or no-visit “dead time” on the road. The inherent inefficiency of in-person visit strategies limits the number of prospects MGOs can actively—and meaningfully—cultivate.

In-person visits also pose problems for fundraisers as they grow increasingly difficult to book. Time is the most precious resource of high-net-worth individuals, and the bar for convincing a prospect to take an hour for a conversation about philanthropy is increasingly high.

These challenges have led some advancement leaders to question whether a “visit or nothing” approach to major gift fundraising is truly the best option.

The University of California, Santa Cruz (UC Santa Cruz) has decided to experiment with a new approach that moves beyond the “visit or nothing” mentality. They’ve done so by expanding MGO metrics.

In addition to in-person visits, fundraisers at UC Santa Cruz are beginning to be evaluated on the number of one-way outreach activities they undertake and two-way exchanges they engage in. One-way outreach includes sending event invitations, mailing personal letters, and taking other actions that get them on prospects’ radars and in their inboxes. Two-way exchanges occur anytime a prospect responds and engages in a conversation with the fundraisers.
Easing the Path to Scalable Cultivation

UC Santa Cruz Equip MGOs to Expand Outreach to Overlooked Portfolio

Putting Content at MGOs’ Fingertips

- Expand marketing/communications team
- Set UCSC website as MGO home page
- Highlight content that is popular and effective
- Invite content experts to address team
- Encourage 2 hours/month at talks, lectures, tours

A Big Uptick in Outreach

Number of Contacts, 2013-2016

- 2013: 4,517
- 2014: 5,437
- 2015: 6,293
- 2016: 8,568

36.2% year-over-year increase in contacts

For fundraisers to send more outreach to their assigned prospects, they must have high-quality content to share and high-interest topics to discuss. To that end, UC Santa Cruz is engaging in an effort to equip MGOs with the best content UC Santa Cruz has to offer.

They’ve done so by expanding the marketing/communications team and pushing high-quality content out to MGOs. They also ask MGOs to spend two hours a month engaged in enrichment activities on campus so that they have interesting, timely things that they can share with donors.

These efforts have led to a spike in outreach to prospects in recent years. Just between 2015 and 2016, the number of contact attempts jumped by 36.2%.

By incentivizing more than just in-person visits, UC Santa Cruz is ensuring active coverage and meaningful cultivation next-steps for a wider segment of each fundraiser’s portfolio.

Source: Advancement Forum interviews and analysis.
Increasing the rate of disqualification and meaningful cultivation touches moves prospects through the cultivation cycle. Yet many fundraisers feel hesitant about rushing the ask.

Some institutions have begun to explore strategies for overcoming that hesitation. They have worked to expedite the ask, thereby increasing the number of major gift proposals being put forward each year. Doing so frees up fundraisers’ capacity and allows for more high-potential unassigned prospects to be moved into portfolios.
Data suggests that MGOs’ hesitation about rushing the ask may be misplaced. One of the distinguishing characteristics of top-performing fundraisers is an aggressive approach to ask timelines.

Top performers consistently put forward major gift proposals in half the time, and with half the moves, of their lower-performing counterparts.

### Time Allocated Equally...

**Average Percentage of Time per Relationship Stage**

<table>
<thead>
<tr>
<th>Relationship Stage</th>
<th>Bottom Quartile n=32</th>
<th>Top Quartile n=30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stewardship</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Solicitation</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Cultivation</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Qualification</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Identification</td>
<td>14%</td>
<td>16%</td>
</tr>
</tbody>
</table>

### But Overall Shorter Time Frame

**Average Number of Visits per Ask**

<table>
<thead>
<tr>
<th>Quartile</th>
<th>n=14 fundraisers</th>
<th>Average Number of Visits per Ask</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top</td>
<td>8</td>
<td><img src="image" alt="Visit Icons" /></td>
</tr>
<tr>
<td>Bottom</td>
<td>10</td>
<td><img src="image" alt="Visit Icons" /></td>
</tr>
</tbody>
</table>

1. Due to individual stage calculations, percentages may not always add up to 100%.

Source:
- Philanthropy Leadership Council’s survey of major and/or principal gift officers, February 2017; Philanthropy Leadership Council interviews and analysis; Advancement Forum interviews and analysis.
Practice 15: Time-Boxed Cultivation Stages

Expedite the Ask

**Practice in Brief**

Advancement leaders institute a division-wide timeline timeline for cultivation. MGOs must move their prospects through discovery, cultivation, and solicitation within 18 months of assignment. Prospects who do not move quickly can be subject to reassignment.

**Problems Addressed**

MGOs worry about moving too quickly toward a major gift proposal. They err on the side of too much, rather than too little, cultivation. Yet in so doing they miss opportunities to solicit prospects who are ready for a proposal. In addition, they create bottlenecks within their portfolios that prevent new prospects from being cultivated.

**Diagnostic Questions**

1. Do MGOs wait more than six months on average to qualify their newly assigned prospects?
   
   ____Yes    ____No

2. Does cultivation continue for over a year before MGOs solicit their prospects for major gifts?
   
   ____Yes    ____No

3. Does it often take more than six months for major gift proposals to close?
   
   ____Yes    ____No

*If you answered "Yes" more times than "No," you may wish to prioritize time-boxed cultivation stages.*

**Institution Profiled**

University of Chicago

• Institutional control: Private
• Enrollment: 15,775 (6,001 undergraduate)
• Carnegie classification: Research University
• Campus setting: Large City (Chicago, IL)
The University of Chicago has worked to act on the insight that an expedited approach to solicitations leads to top fundraising performance.

Advancement leaders at the university now ask all of their fundraisers to move prospects through the cultivation cycle in under two years. Prospects can spend no more than six months in qualification, twelve months in cultivation, and six months in solicitation.

MGO managers work with their fundraisers to ensure that prospects are moving through the cycle at a quick clip. And, while it is rare, prospects who spend too long in any one stage can be reassigned to another fundraiser.

This expedited approach, paired with other division-wide changes, has supported an overall increase in major gift proposal activity.
Importantly, the University of Chicago’s approach has turned MGOs’ sights toward unexplored parts of the pipeline. They now prioritize higher-capacity prospects whom they can ask at a major gift level. High-net-worth parents have likewise attracted more cultivation activity, as their timeline to a major gift ask tends to be shorter than for an alumnus/a or unaffiliated individual.

Lastly, MGOs have begun spending more time cultivating “colder” alumni and friends. They do so because they quickly move “warm” prospects through the cultivation cycle and must find new prospects to engage.
Practice 16: Fast-Track Prospect Gap Analysis

Expedite the Ask

Practice in Brief
Prospects are selected and prioritized for cultivation based on the likelihood that they will give to capacity quickly. MGOs focus in particular on high-net-worth individuals who currently give but do so below their full capacity, as well as donors who last gave major gifts before the current campaign started.

Problems Addressed
Even MGOs who work to move prospects quickly toward an ask often focus their efforts on the wrong prospects. Not all high-net-worth individuals will take the same amount of time to arrive at a major gift proposal. Overinvesting time in prospects with extensive capacity but a low likelihood to give in the short term undercuts the institution’s fundraising performance and constrains pipeline development.

Diagnostic Questions
1. Is your institution approaching the end of a campaign?
   ___Yes   ___No

2. Does your institution have too many prospects at certain tiers of the gift pyramid to conduct broad discovery efforts within a short period of time?
   ___Yes   ___No

3. Will your technological infrastructure or MGO activity trackers accommodate special coding for top-priority prospects?
   ___Yes   ___No

If you answered “Yes” more times than “No,” you may wish to prioritize a fast-track prospect gap analysis.

Institution Profiled
University of Southern California
• Institutional control: Private
• Enrollment: 43,871 (18,794 undergraduate)
• Carnegie classification: Research University
• Campus setting: Large City (Los Angeles, CA)
Identifying Prospects for Expedited Gifts

Fast-Track Analysis Finds Best Leads for Final Campaign Sprint

With Clock Ticking, USC Uncovers Campaign Pyramid Gap

Prospect Strategy Three Years Before Campaign End

<table>
<thead>
<tr>
<th>Gift Level</th>
<th>Number of Gifts Required</th>
<th>Number of Prospects Needed</th>
<th>Number of Prospects Rated</th>
</tr>
</thead>
<tbody>
<tr>
<td>$250,000,000</td>
<td>2</td>
<td>6</td>
<td>39</td>
</tr>
<tr>
<td>$100,000,000</td>
<td>7</td>
<td>21</td>
<td>74</td>
</tr>
<tr>
<td>$75,000,000</td>
<td>5</td>
<td>15</td>
<td>29</td>
</tr>
<tr>
<td>$50,000,000</td>
<td>2</td>
<td>18</td>
<td>33</td>
</tr>
<tr>
<td>$25,000,000</td>
<td>2</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>$10,000,000</td>
<td>1</td>
<td>164</td>
<td></td>
</tr>
<tr>
<td>$5,000,000</td>
<td>61</td>
<td>183</td>
<td>175</td>
</tr>
<tr>
<td>$2,500,000</td>
<td>195</td>
<td>585</td>
<td>185</td>
</tr>
<tr>
<td>$1,000,000</td>
<td>1,000</td>
<td>4,000</td>
<td>1,458</td>
</tr>
<tr>
<td>$500,000</td>
<td>1,109</td>
<td>4,436</td>
<td>2,534</td>
</tr>
<tr>
<td>$250,000</td>
<td>1,490</td>
<td>5,960</td>
<td>8,789</td>
</tr>
<tr>
<td>$100,000</td>
<td>1,800</td>
<td>7,200</td>
<td>34,157</td>
</tr>
<tr>
<td>$50,000</td>
<td>2,750</td>
<td>11,000</td>
<td>5,804</td>
</tr>
<tr>
<td>$25,000</td>
<td>4,500</td>
<td>18,000</td>
<td>232,703</td>
</tr>
<tr>
<td>Subtotal</td>
<td>12,975</td>
<td>51,605</td>
<td>414,044</td>
</tr>
</tbody>
</table>

USC expedited the ask by directing fundraisers toward those prospects who were best positioned to give a gift quickly.

As USC approached the original end date of their campaign, a prospect-pyramid analysis revealed too few prospects at major gift levels to bring the university to its goal.

Advancement leaders determined that they must prioritize prospects outside of these underpopulated tiers who might give on an expedited timeline.

Sources: "After the Love Has Gone" presentation at CARA 2015 Statewide Conference; Advancement Forum interviews and analysis.
These fast-track prospects included donors who were currently giving below capacity, individuals who were highly engaged or highly rated, and those who gave a major gift before the campaign began but had not done so during the current campaign.

Advancement staff coded these individuals in the database, flagged them in MGO activity trackers, and emphasized the need to focus on them during check-ins with MGOs.

This attention supported USC’s successful race to the campaign’s end. In fact, they were so successful overall that they have extended the campaign’s end date and raised the goal.
## Instructions:
Based on your institution’s goals and available resources, use the chart below to map out which of the tactics profiled in this section you would like to prioritize. Use this document to assess viability and determine next-steps.

<table>
<thead>
<tr>
<th>Tactic</th>
<th>My Institution Should Prioritize This Tactic</th>
<th>Notes and Next-Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>&quot;Reasonable Attempt&quot; Contact Criteria</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>George Washington University</td>
<td>1  2  3  4  5</td>
<td>Disagree  Agree</td>
</tr>
<tr>
<td>MGOs make two contact attempts through two channels for four</td>
<td></td>
<td></td>
</tr>
<tr>
<td>consecutive quarters and then disqualify to move on to more responsive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>prospects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Automatic Prospect Sunsetting System</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colorado State University</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Prospects whom MGOs do not regularly engage are removed from portfolios;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MGOs lose incentive pay points.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Discovery Officer Referral Process</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northern Kentucky University</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Unresponsive major-gift prospects are handed to discovery officers to</td>
<td></td>
<td></td>
</tr>
<tr>
<td>continue the outreach process, thereby freeing up MGO portfolios for</td>
<td></td>
<td></td>
</tr>
<tr>
<td>new prospects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Stage-Change Metrics</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ithaca College</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Advancement leaders evaluate and reward MGOs based on how many</td>
<td></td>
<td></td>
</tr>
<tr>
<td>prospects they are able to move from one cultivation stage to the next.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Prioritization Guide (cont.)

Speeding Implementation and Ensuring Follow-Through

<table>
<thead>
<tr>
<th>Tactic</th>
<th>My Institution Should Prioritize This Tactic</th>
<th>Notes and Next-Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pipeline Cultivation Metrics</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>University of Southern California</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metric system incentivizes MGOs to perform key pipeline development activities, such as assigning prospects ratings and creating cultivation strategies.</td>
<td>1 2 3 4 5</td>
<td>Disagree Agree</td>
</tr>
<tr>
<td><strong>Plug-and-Play Cultivation Guide</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Marquette University</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twenty-one page manual for MGOs streamlines cultivation planning by connecting prospect interests with existing opportunities.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td><strong>Cultivation Concierge</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Bryant University</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MGOs offload cultivation planning to concierge and focus instead on execution.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td><strong>Prospect Interaction Metrics</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>University of California, Santa Cruz</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MGOs are rewarded for one-way and two-way exchanges with prospects (other than visits) to increase outreach in new, meaningful ways.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
## Prioritization Guide (cont.)

**Speeding Implementation and Ensuring Follow-Through**

<table>
<thead>
<tr>
<th>Tactic</th>
<th>My Institution Should Prioritize This Tactic</th>
<th>Notes and Next-Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time-Boxed Cultivation Stages</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>University of Chicago</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institution-wide timeline for cultivation encourages MGOs to accelerate prospects to the ask within 18 months of assignment.</td>
<td>1 2 3 4 5 Agree</td>
<td></td>
</tr>
<tr>
<td><strong>Fast-Track Prospect Gap Analysis</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>University of Southern California</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospects are selected and prioritized for cultivation based on the likelihood that they will give to capacity before the end of the campaign.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
Scaling Personalized Cultivation
Shifting Our Focus to the Future

Developing-Capacity and ‘Cold’ Prospects Go Uncultivated

This final section will focus on tomorrow’s major gift prospects. These individuals are often rising-capacity mid-career individuals or those who are poised to inherit great wealth in the coming years. The group also includes ultra-high-net-worth individuals who have never before engaged with the institution and do not respond to outreach from fundraisers.

Advancement leaders must find scalable ways to cultivate both groups without the direct intervention of major gift officers.

Source: Advancement Forum interviews and analysis.
Tomorrow’s Prospects Beyond Our Reach

Significant Constraints Hamper Full-Pipeline Cultivation

“Why Aren’t We Cultivating the Pipeline?”

<table>
<thead>
<tr>
<th>Prospects Still Developing Capacity</th>
<th>Prospects Are Not Warm</th>
<th>Not Enough Fundraisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>“We should stay in touch, but we can’t focus our MGOs on low-level prospects.”</td>
<td>“We’ve tried reaching out, and we get nothing. They’re just not willing to take a visit with an MGO.”</td>
<td>“We operate in an environment of scarcity. Our MGOs can only do so much. But that can mean they ignore the pipeline.”</td>
</tr>
</tbody>
</table>

A Conundrum of Scale

- 20.3 Average number of MGOs
- 15.5 New prospects seen annually per MGO
- 24 Years to visit just 10% of alumni of record

MGOs should not focus on these prospect populations because the returns from doing so are low in the short term. And with relatively few MGOs on staff, advancement leaders must rigorously prioritize the leads their teams pursue.

Indeed, the ratio of undiscovered prospects to MGOs is so high that an average team of fundraisers can spend decades just working through today’s potential donors.
Yet advancement leaders cannot allow tomorrow’s prospects to fall into the same one-size-fits-all mass-marketing segments as all other alumni and prospects. Typical university communications, engagement programming, and annual giving appeals do not do enough to meaningfully cultivate these individuals.

Recognizing this deficiency, many advancement leaders have set out in recent years in search of a scalable cultivation strategy they can use with their next tier of prospects.

"We have no problem finding that ‘next layer’ of prospects. Honestly, we have more unqualified and lukewarm prospects than we can handle. There are plenty of prospects who aren’t getting attention. What we’re looking for is a strategy to cultivate and keep them warm until they merit personal attention—and to maximize their giving without that personal attention. We can do visits. We struggle with the ‘scale’ piece."

Susan Hayes-McQueen
Senior Director, Prospect Management, Research, and Analytics
University of Washington

Source: Advancement Forum interviews and analysis.
It Takes a Village to Cultivate a Pipeline

To Achieve Scale, Advancement as a Whole Must Rethink Strategy

A Road Map for Scaling Personalized Cultivation

Scaling personalized cultivation requires all areas of the advancement enterprise to collaborate. Communications professionals, alumni relations staff, and annual giving teams all have a role to play in engaging tomorrow’s best prospects and warming them to the idea of an investment in the institution.
The first set of strategies involves partnerships with the marketing and communications team to track the digital engagement patterns of tomorrow’s prospects and segment content to increase their feeling of connection to the university.
‘One-Size-Fits-None’ Communications

Best Outreach Sent to Prospects Who Are Already Warm

Compelling Messages for Current Donors...

• Donor relations sends annual reports, impact statements
• Gift society members receive advance notice of breaking news

...But Little for "Cold" or Unconvinced Prospects

• Highly rated, unengaged prospects included in broadest marketing segments
• Generic content does little to cultivate and increase engagement

For most institutions, communications are an untapped opportunity for scalable, personalized cultivation. Currently, the best communications go to individuals who are already convinced of the value of investing in the institution. These donors give society-level gifts and receive impact statements, advance notice of breaking news, and more. The marketing and communications and donor relations teams treat them as true insiders.

Prospects whom the institution hopes to cultivate but who have not yet given are left out of these communications streams. They receive the same communications and content that all other constituents see. Often, these pieces do little to move them meaningfully through the engagement pipeline.

The “Chicken and Egg” Prospect Problem

“I see something of a ‘chicken and egg’ problem when it comes to our high-potential, unengaged prospects. They’re not getting segmented communications personalized to them because they’re not giving society-level gifts—and they’re not giving society-level gifts because we’re not cultivating them with those messages.”

Vice President for Advancement
Private Research University

Source: Advancement Forum interviews and analysis.

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Practice 17: High-Touch Prospect Communications

Warm the Unengaged

Practice in Brief

Advancement communications or marketing/communications staff track and analyze engagement rates on communications to identify meaningful touchpoints for high-potential unassigned prospects. They then segment these prospects for customized messaging in broader communications campaigns.

Problems Addressed

High-potential prospects who are currently unassigned receive the same one-size-fits-all messaging as all other constituents. Many of them are not yet engaged enough to acquiesce to a visit with an MGO, yet communications staff do little to target them with content that would meaningfully increase their engagement rates.

Diagnostic Questions

1. Does your institution have a large number of unassigned, highly rated prospects?
   ____Yes  ____No

2. Can your communications team track open rates, click-through rates, etc. at the individual level (rather than in the aggregate)?
   ____Yes  ____No

3. Does your communications team have capacity to customize content and segment campaigns for high-potential prospects?
   ____Yes  ____No

If you answered “Yes” more times than “No,” you may wish to prioritize high-touch prospect communications.

Institution Profiled

McGill University

• Institutional control: Public (Canada)
• Enrollment: 40,971 (27,526 undergraduate)
• Classification: Research University
• Campus setting: Large City (Montreal, QC)
McGill University is moving toward segmenting out tomorrow’s prospects for specialized communications streams.

The marketing and communications team has begun analyzing engagement patterns and behaviors that this group exhibits when the university sends out communications.

They will use that data in the future to customize mass communications and address the prospects in a way they will find particularly meaningful.

Ultimately, McGill hopes to warm tomorrow’s prospects up so that they will welcome conversations about major gifts in the future.
Practice 18: Prospect ‘Warming’ Campaign

Warm the Unengaged

Practice in Brief
Targeted engagement communications nurture leads and warm prospects. Teams of phonathon callers follow up with prospects to schedule visits following the conclusion of the three-month warming period.

Problems Addressed
Many unassigned prospects have low engagement and affinity levels. They perceive the few communications they receive, consisting mostly of annual fund appeals and general university news, as “noise” to be ignored. When MGOs reach out for a visit, their requests likewise land in the trash folder.

Diagnostic Questions
1. Do MGOs struggle to book visits with new prospects?
   ___Yes ___No
2. Do constituents typically receive uncoordinated communications from many areas of campus?
   ___Yes ___No
3. Can your annual fund sustain the revenue decline that would come with redirecting callers’ time toward scheduling discovery visits?
   ___Yes ___No

If you answered “Yes” more times than “No,” you may wish to prioritize prospect “warming” campaigns.

Institution Profiled
Rutgers University
• Institutional control: Public
• Enrollment: 50,146 (36,168 undergraduate)
• Carnegie classification: Research University
• Campus setting: Small City (New Brunswick, NJ)
Warming the Unengaged

Multichannel Campaign for High-Potential Suspects at Rutgers University

Rutgers University is also aiming to warm unengaged prospects, though they are doing so in the hopes of seeing major gift returns in the short term.

The advancement team at Rutgers targeted 5,000 cold, unresponsive prospects with engagement communications for a three-month period. These multichannel communications won mindshare among the prospects and underscored a feeling of connection to the university.

Following the end of the communications campaign, callers began reaching out to the prospect group to schedule visits with MGOs. As this pilot effort concludes, advancement leaders at Rutgers will hope to see the warming campaign positively impact prospects’ receptivity to further engagement with and investment in the institution.
Alumni relations is also well-positioned to contribute to pipeline development. Alumni engagement, after all, doubles as cultivation and correlates strongly with giving rates.

Some institutions have adopted an even more deliberate approach and have aimed to shift their engagement programming to achieve specific cultivation goals.

---

**It Takes a Village to Cultivate a Pipeline**

To Achieve Scale, Advancement as a Whole Must Rethink Strategy

---

**A Road Map for Scaling Personalized Cultivation**

1. Develop Nurture Campaigns
2. Shift from Engagement to Cultivation
3. Create Bespoke Solicitation Experiences

---

Source: Advancement Forum interviews and analysis.
Practice 19: Pipeline-Focused Alumni Programming

Prioritize Prospects for Engagement

Practice in Brief
Alumni relations staff develop programming that would appeal particularly to a high-potential prospect audience, especially executives. They target the invitation list toward unassigned prospects whom MGOs do not currently have capacity to cultivate, thereby acting as a “force multiplier” for cultivation efforts.

Problems Addressed
Engagement programming often aims to serve the entire alumni community. The broadly resonant orientation of this programming often holds little appeal for high-potential prospects. They feel underserved by these offerings, yet MGOs do not have capacity to cultivate them, leading to a complete lack of engagement with the institution.

Diagnostic Questions
1. Is your engagement programming primarily focused on regional chapters, young alumni, and reunion classes?
   ___Yes  ___No

2. Have you seen declining attendance rates at in-person programs in recent years?
   ___Yes  ___No

3. Do alumni relations and development enjoy a collaborative and mutually beneficial working relationship?
   ___Yes  ___No

If you answered “Yes” more times than “No,” you may wish to prioritize pipeline-focused alumni programming.

Institutions Profiled

DePaul University
- Institutional control: Private
- Enrollment: 23,110 (15,407 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Chicago, IL)

Marquette University
- Institutional control: Private
- Enrollment: 11,294 (8,238 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Milwaukee, WI)

University of Michigan
- Institutional control: Public
- Enrollment: 44,718 (28,983 undergraduate)
- Carnegie classification: Research University
- Campus setting: Midsize City (Ann Arbor, MI)
Recent years have brought cultural changes to the alumni relations profession. Alumni relations leaders across North America have taken steps to rethink traditional programming models, success metrics, and even the scope and mission of programming.

Cultural change has brought with it shifts in structure. Today, nearly two-thirds of alumni relations shops are integrated with development. Many of these shops enjoy a larger budget to execute on efforts critical to the overall advancement enterprise.
Launching Pipeline-Focused Programming

Engagement Events Developed to Appeal to High-Potential Segments

DePaul University’s
Emerging Leaders Dinners

Small group dinners for future pipeline prospects
- 10-14 young alumni under 40 with promising job titles
- MGOs (and others) pass leads for prospects to invite
- Attendees give at higher rates after participating

University of Michigan’s
X Plore Science Camp

Mid-career alumni bring children for joint programming
- Three-day engineering and science camp for families
- High-potential prospects receive targeted invite
- Attendance used as sign of enthusiasm, inclination

Marquette University’s
CEO Roundtables

Executive-focused events for key industries and regions
- High-potential prospects visit major donor’s workplace
- Programming involves tours and networking
- Program regularly yields high-level major gifts

Making It Work on Your Campus

Identify an underserved high-potential population
Determine interest and demand for programming
Leverage donor and volunteer networks to recruit prospects
Collaborate with development to send follow-up appeals

The first step many advancement leaders take to engage alumni relations in pipeline development involves building pipeline-focused programming. Colleges and universities of all types have begun reverse-engineering their programming to meet a particular need among an underserved high-potential segment in the alumni community.

For these initiatives to succeed, alumni relations and development must work closely together, passing information back and forth and bringing their respective areas of expertise to bear on creating high-quality engagement opportunities.
Practice 20: Alumni Engagement Portfolios

Prioritize Prospects for Engagement

Practice in Brief
Alumni relations staff members are assigned portfolios of alumni to engage. These supersized portfolios, often numbering over 1,000 alumni, are segmented by long-term major-gift potential. Engagement officers prioritize the 150 prospects with the greatest long-term major gift potential while ensuring that their remaining assigned alumni receive high-touch, personalized engagement.

Problems Addressed
No member of the advancement team has accountability for high-potential prospects until the prospects are assigned to MGOs. Mid-career alumni who are still building capacity are relegated to the general alumni population for engagement. Few steps are taken to personalize these general engagement offerings or ensure they are resonating with these priority populations.

Diagnostic Questions
1. Does your institution see lower engagement rates with rising-capacity alumni than with other populations?
   ___Yes   ___No

2. Do you currently lack development staff to oversee personalized engagement or cultivation for prospects outside of MGO portfolios (e.g., leadership annual gift officers)?
   ___Yes   ___No

3. Is the average tenure of advancement staff at your institution greater than three years, thereby ensuring continuity in relationships with alumni?
   ___Yes   ___No

*If you answered "Yes" more times than "No," you may wish to prioritize alumni engagement portfolios.*

Institution Profiled
Elon University
• Institutional control: Private
• Enrollment: 6,739 (6,008 undergraduate)
• Carnegie classification: Master's university
• Campus setting: Midsize Suburb (Elon, NC)
Elon University has taken even bolder steps to shift from engagement to cultivation within alumni relations. They did so by reorganizing a segment of their alumni relations staff's workflow around portfolios.

Elon hired three alumni engagement officers to each carry a portfolio of 1,150 engagement prospects, with 150 of those prospects being designated as top priorities.

The officers use scalable cultivation mechanisms, such as text messages, mail-merged emails, and phone calls, to actively engage their assigned alumni.

Source: Advancement Forum interviews and analysis.
The alumni engagement officers are evaluated based on how effectively they inspire their assigned alumni to come to events, volunteer, and give.

By those measures, they have been highly successful. Two out of five assigned alumni now attend events. One in four volunteers. Over half give back. Amazingly, the donor participation rate for this group was just 35% prior to the start of the program, which testifies to the officers’ impact.
Annual giving has an outsized role to play in pipeline development. Past giving is the best indicator of future giving, and donors who upgrade consistently have a far higher likelihood of one day becoming a major gift donor.

By mimicking the major gift experience at an annual giving or leadership annual giving level through bespoke solicitations, advancement teams can offer donors a compelling preview of what further investments in the institution will bring.
Chief advancement officers’ annual giving priorities have shifted substantially in recent years.

Whereas alumni participation rates were at the center of most annual giving strategies in the earlier part of this decade, many advancement leaders have recognized that the pipeline will not advance itself. Annual giving must focus on retaining and, importantly, upgrading current donors and high-potential prospects to realize the greatest revenue potential.

To achieve this end, many colleges and universities have invested in leadership annual giving officers. These fundraisers carry large portfolios of mid-level donors and discovery prospects. They have high visit expectations, and they make an ask at a leadership annual gift level on every visit.

Sources: Burning Glass Labor/Insight™ job posting data; Advancement Forum interviews and analysis.
Practice 21: Major Gifts Lite Proposals

Mimic the Major Gift Experience

**Practice in Brief**

Advancement leaders segment a small group of overlooked prospects who are well positioned to upgrade to a higher giving level. These donors receive high-quality, customized direct-mail solicitations that resemble major gift proposals. The proposals ask for an ambitious upgrade to the next level of the institution’s gift society, which often involves a doubling of the donor’s previous gift.

**Problems Addressed**

Prospects receive nearly identical annual fund appeals regardless of their medium- or long-term major gift potential. While the default ask amounts on these appeals may vary by capacity, the content of the solicitation is the same. These appeals do little to communicate to donors that they have the potential to make a high-impact, meaningful investment in the institution that will stand apart from a standard annual fund gift.

**Diagnostic Questions**

1. Do prospect receive similar or identical annual fund appeals regardless of capacity?
   
   ___Yes ___No

2. Does your team have the capacity or budget to design a special appeal for high-potential donors?
   
   ___Yes ___No

3. Does your gift society feature multiple levels that you can use as upgrade incentives?
   
   ___Yes ___No

*If you answered “Yes” more times than “No,” you may wish to prioritize a major gifts lite proposal.*

**Institution Profiled**

Oregon State University

• Institutional control: Public
• Enrollment: 30,354 (25,327 undergraduate)
• Carnegie classification: Research University
• Campus setting: Small City (Corvallis, OR)
Advancement leaders need not wait for leadership annual gift officers before starting to upgrade tomorrow’s prospects. Oregon State University has done so with a high-quality, four-page mailing that resembles a major gift proposal.

The proposal is sent in a large, priority-mail envelope with a handwritten address that stands out from other direct-mail pieces. A personalized reply card asks for a specific upgrade amount.

In addition, the appeal is populated with customized content based on donor interests and giving histories. Advancement staff automate the customization process as much as possible by using a mail merge that links content such as impact stories to commonly shared donor characteristics.

**Key Proposal Elements**

- 4 page *impact-driven* investment proposal
- *Personalized* letter from a senior leader
- Highly *customized reply card*
- Large, *priority-mail* envelope
- *Handwritten* address on the envelope

Source: Advancement Forum interviews and analysis.
The major-gifts-lite appeal goes to a shifting milieu of prospect segments, often consisting of leadership society donors who seem poised for an upgrade, as well as highly rated non-donors.

Advancement staff at Oregon State hope that the high-quality appeal stands out in prospects’ crowded mail piles and inspires them to make a greater investment in the institution.
A Proposal That Stands Out
Segmented, Personalized Outreach Produces Large Gains in ROI

Targeted Upgrade Proposals
Key Performance Indicators (KPIs)

<table>
<thead>
<tr>
<th>Performance Metrics</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response Rate</td>
<td>5.6%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Number of Donor Households</td>
<td>51</td>
<td>81</td>
</tr>
<tr>
<td>Average Gift Amount</td>
<td>$3,023</td>
<td>$2,590</td>
</tr>
<tr>
<td>Total Revenue¹</td>
<td>$186,842</td>
<td>$229,000</td>
</tr>
<tr>
<td>Return on Investment (excludes staff time)</td>
<td>46:1</td>
<td>61:1</td>
</tr>
</tbody>
</table>

1) Total revenue includes matching gifts of $32,680 for 2013 and $20,000 for 2014.

The returns from Oregon State’s proposals have more than justified the resources that advancement leaders dedicate to them. Every year, recipients of the mailing respond enthusiastically, upgrading their giving to higher tiers of the mid-level.

The inclusion in 2014 of entry-level President’s Circle donors—tomorrow’s major gift prospects—had a particularly beneficial impact on the mailing’s returns. This group proved to be primed for upgrades. Their gifts helped drive Oregon State’s revenue from the mailing past $200,000, resulting in remarkably high ROI.
Practice 22: Social Media Solicitation Testing

Mimic the Major Gift Experience

**Practice in Brief**

Social media engagement data points advancement staff to topics and themes that resonate with priority populations, such as rising-capacity prospects or highly rated unassigned prospects. Staff solicit these populations for gifts to funds that align with the content they engage with online.

**Problems Addressed**

Advancement staff struggle to identify what resonates with prospects whom MGOs do not have the opportunity to sit down and talk to. Unrestricted asks fall flat, as do open-ended asks for restricted gifts. While staff suspect there’s likely some cause that would move these individuals to make a significant philanthropic investment in the institution, they can rarely figure out what it is.

**Diagnostic Questions**

1. Do advancement staff struggle to identify a high-interest fund that would resonate with rising-capacity prospects?
   - ___Yes    ___No

2. Do your institution’s social media accounts generate enough engagement and activity to merit analysis?
   - ___Yes    ___No

3. Does your institution have the technical capability to export engagement data and match it to database records?
   - ___Yes    ___No

*If you answered “Yes” more times than “No,” you may wish to prioritize social media solicitation testing.*

**Institution Profiled**

Massachusetts Institute of Technology

- Institutional control: Private
- Enrollment: 11,376 (4,524 undergraduate)
- Carnegie classification: Research University
- Campus setting: Midsize City (Cambridge, MA)
Personalized cultivation must involve engaging prospects around a cause or topic about which they feel passionately. Yet determining the interest of tomorrow’s prospects in a scalable way often proves difficult.

Rather than guess which causes would move high-potential non-donors to give, advancement leaders at the Massachusetts Institute of Technology (MIT) decided to use social media engagement data to identify topics. In partnership with Evertrue, MIT analyzed which Facebook posts performed best with non-donors.

They found that a story about a student robotics group generated intense enthusiasm among alumni non-donors. They followed up on this piece by soliciting all non-donors for a gift to the robotics group’s crowdfunding campaign.

Sources: Advancement Forum interviews and analysis.
Robotics Solicitation Strikes a Chord

Analytics Point to the Right Cause for High-Potential Non-Donors

MIT Email Appeal Nearly Doubles Donors...

Total Robotics Campaign Donors, April-May 2015

Robotics appeal sent to all non-donors

24 80 141 172

Apr 15 May 19

...And Surfaces Leadership Gift from Non-Donor

Total Robotics Campaign Dollars

$29,000

$20,000

Targeted solicitation yields $20,000 gift from a rated non-donor who had never taken a visit

The robotics solicitation ultimately helped bring in an additional 90 donors to the project. Many of these individuals had never before given a gift to the institution.

More importantly, the solicitation elicited a $20,000 gift from a non-donor who had never before taken a visit with MIT. This gift is directly attributable to MIT’s strategy of using digital indicators of affinity to determine what will best resonate with pipeline prospects.

Source: Advancement Forum interviews and analysis.
Practice 23: Digital Gift Officers

Mimic the Major Gift Experience

Practice in Brief
Gift officers cultivate and solicit prospects for leadership annual gifts through a multichannel, remote strategy (phone, email, social media, videoconferencing, etc.). They use scalable techniques to lend a personal, relationship-based touch to institutional outreach.

Problems Addressed
Leadership annual gift officers have proved effective, but they come at a fairly high cost to the institution. In addition, the busiest prospects may shy away from in-person meetings, as time is their most precious commodity.

Diagnostic Questions
1. Are your unassigned prospects typically younger individuals who are more comfortable with using digital channels for communication and engagement?
   ___Yes ___No
2. Are your prospects spread across a wide geographic region that would be hard for a traveling fundraiser to cover?
   ___Yes ___No
3. Is the share of high-net-worth prospects who gave a gift of any size in the past five years lower than 40%?
   ___Yes ___No

If you answered "Yes" more times than "No," you may wish to prioritize digital gift officers.

Institutions Profiled
Davidson College
- Institutional control: Private
- Enrollment: 1,796 (1,796 undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Large Suburb (Davidson, NC)

Cornell University
- Institutional control: Private
- Enrollment: 22,319 (14,566 undergraduate)
- Carnegie classification: Research University
- Campus setting: Small City (Ithaca, NY)

Implementation Resource
See p. 136 for the digital gift officer job description.
The Rise of the Digital Gift Officer

New Fundraising Role Deprioritizes Visits to Emphasize Interactions

A Massive Portfolio at Davidson College

1,000+ Assigned prospects

1 Suspected wealth

2 Upgrade velocity

3 Assigned but overlooked

Apply Now: Digital Engagement Officer

Direct Solicitation/Stewardship (55% of time)
Using digital strategies to identify, qualify, cultivate, and steward selected alumni as donors and volunteers...

Digital Engagement Strategy (20% of time)
Develop a comprehensive digital engagement strategy for identified segments of the alumni population...

Data Analysis (10% of time)
Evaluate the reach for all digital engagement...

Special Projects (15% of time)
Responsible for making solicitation calls and texts...

A Multichannel Approach to Pipeline Development

Personalized email outreach + Text-message campaigns + Skype video conversations + Social media engagement

Some institutions have moved toward an even more scalable cultivation strategy: hiring digital gift officers. Digital gift officers engage and solicit large portfolios of leadership annual prospects and high-potential discovery prospects with few to no in-person visits.

Davidson College recently hired their first digital gift officer. Advancement leaders have tasked this new team member with using digital channels, such as email, text messages, Skype, and social media, to cultivate a portfolio of over 1,000 prospects. Many of these prospects have fallen outside of Davidson’s cultivation efforts in the past due to staffing constraints.

Source: Advancement Forum interviews and analysis.
Cornell University has employed digital gift officers for a longer period of time. In fact, Cornell hired their first digital gift officer before hiring their first traveling leadership gift officer, so advancement leaders have been able to evaluate the unique strengths of the position over time.

Digital gift officers bring Cornell a number of advantages, such as cost savings due to the lack of travel, a greater geographic reach to cultivate prospects who live far from the institution, and the ability to meet some prospects, especially younger ones, on the digital channels that they prefer for engagement and communication.

The biggest benefit that digital gift officers bring to Cornell, though, is fundraising revenue. The officers each raise upwards of $700,000 a year, mostly in the form of $5,000 to $25,000 gifts that they solicit without ever meeting most of their prospects in person. Occasionally they will surface an even larger gift pursuit. One digital gift officer, for instance, was the first point of contact for a prospect who ended up giving $400,000 to the university.

Digital gift officers act as a cultivation force-multiplier, extending the advancement office’s reach and ensuring that tomorrow’s prospects move swiftly through the pipeline toward major gifts.

Source: Advancement Forum interviews and analysis.
Instructions:
Based on your institution’s goals and available resources, use the chart below to map out which of the tactics profiled in this section you would like to prioritize. Use this document to assess viability and determine next-steps.

<table>
<thead>
<tr>
<th>Tactic</th>
<th>My Institution Should Prioritize This Tactic</th>
<th>Notes and Next-Steps</th>
</tr>
</thead>
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<td>High-Touch Prospect Communications</td>
<td><img src="image" alt="Disagree Agree" /></td>
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<tr>
<td>McGill University</td>
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<td>Marketing/communications segments</td>
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<td>high-potential unassigned prospects</td>
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<td>for customized messaging and engagement</td>
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<td>outcome tracking</td>
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<tr>
<td>Prospect “Warming” Campaigns</td>
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<td>Rutgers University</td>
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<tr>
<td>Targeted engagement communications</td>
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<tr>
<td>nurture leads and warm prospects prior</td>
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<td>visit-scheduling attempts</td>
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<tr>
<td>Pipeline-Focused Alumni Programming</td>
<td>1 2 3 4 5</td>
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<td>DePaul University, University of Michigan,</td>
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<td>Marquette University</td>
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<td>Special-interest engagement events</td>
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<td>target high-potential alumni segments</td>
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<td>and ensure that alumni relations programming</td>
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<td>yields high ROI</td>
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<td>Alumni Engagement Portfolios</td>
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<td>are segmented by long-term major-gift</td>
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<td>potential to prioritize outreach efforts.</td>
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## Prioritization Guide (cont.)

### Speeding Implementation and Ensuring Follow-Through

<table>
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<tr>
<th>Tactic</th>
<th>My Institution Should Prioritize This Tactic</th>
<th>Notes and Next-Steps</th>
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<tr>
<td><strong>Major-Gifts-Lite Proposals</strong></td>
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<td><em>Oregon State University</em></td>
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<tr>
<td>Four-page color-printed personalized</td>
<td>1 2 3 4 5 Agree</td>
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<td>prospectuses outline the case for giving</td>
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<td>and solicit mid-level gifts from</td>
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<td>unmanaged prospects.</td>
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<td><strong>Social Media Solicitation Testing</strong></td>
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<td><em>Massachusetts Institute of Technology</em></td>
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<td>similarly themed fund.</td>
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<td><strong>Digital Gift Officers</strong></td>
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<td><em>Davidson College, Cornell University</em></td>
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<td>Gift officers cultivate and solicit</td>
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<td>through a multichannel remote strategy</td>
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<td>videoconferencing, etc.).</td>
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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**

- Business Ownership (type of business, years in business, sales trends, recent sale)
- Career Path (promotions, titles)
- Board Involvement (business or civic)
- Secondary Homes
- Investment Properties (commercial, apartments, farms, vineyards)
- Family Foundation
- Major Philanthropic Gifts to Other Organizations
- Vacation Spots
- Yachts, Private Airplanes
- Collections (art, jewelry, antiques)
- Country Club Membership
- Hobbies (show horses, wine collecting, cars, sailing)
- Boarding Schools for Children
- Household Staff (nannies, chauffer, 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-$999,999
- 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.

Source: Adapted from materials provided by the Rochester Institute of Technology.
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?

<table>
<thead>
<tr>
<th>Metric 1</th>
<th>Baseline Goal for Metric 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metric 2</td>
<td>Baseline Goal for Metric 2</td>
</tr>
<tr>
<td>Metric 3</td>
<td>Baseline Goal for Metric 3</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Cultivation Opportunity Name</th>
<th>Point Person Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Point Person Phone Number</td>
</tr>
<tr>
<td>How Often Does This Opportunity Occur?</td>
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<tr>
<td>What Types of Prospects Would Be Best Suited for This Opportunity?</td>
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<tr>
<td>Description</td>
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<tr>
<th>Cultivation Opportunity Name</th>
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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)
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.