

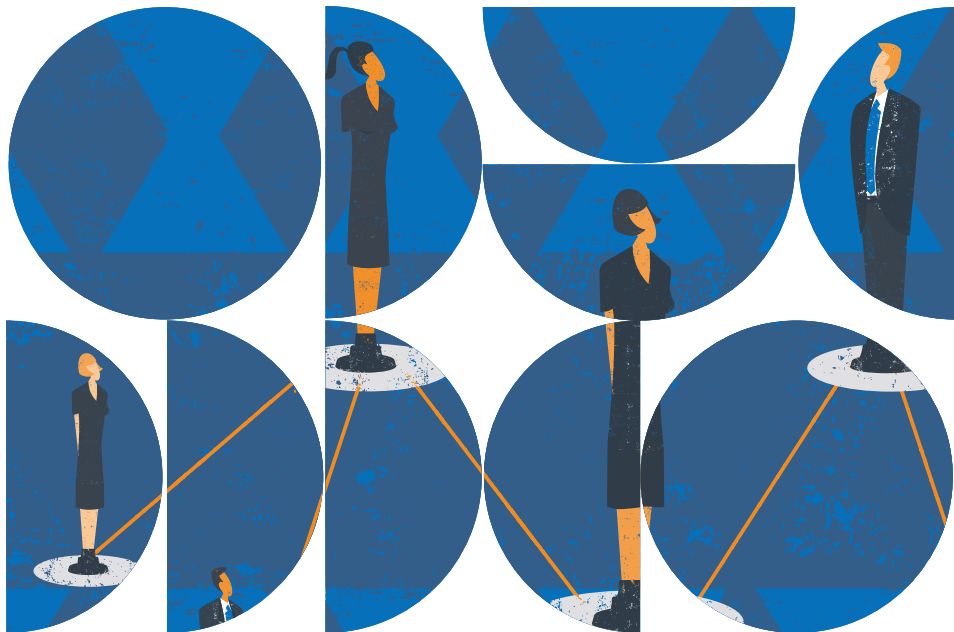


EAB

# New Frontiers in Pipeline Development

Maximizing Major Gifts from Overlooked Prospects

Advancement  
Forum







EAB

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Maximizing Major Gifts from Overlooked Prospects

# Advancement Forum

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# Top Lessons from the Study

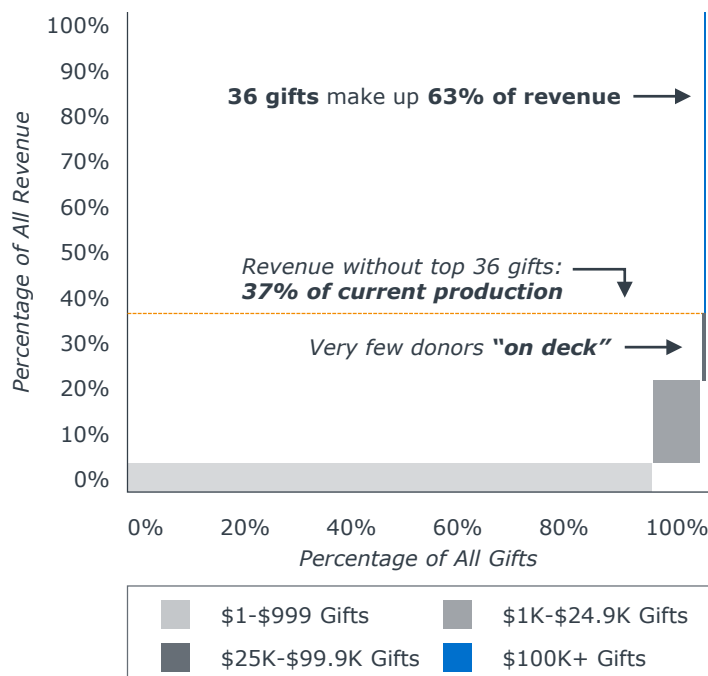
## Pipeline Gap Poses Risks to Fundraising Sustainability

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.

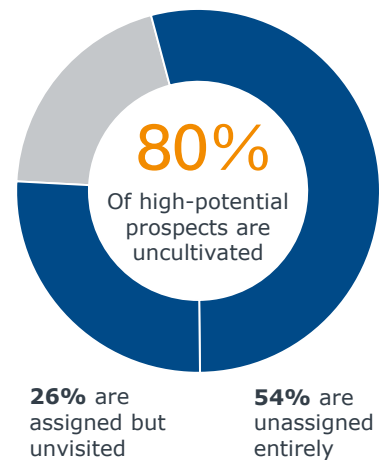
### Success Rests on Needle-Thin Donor Segment

Revenue and Gifts by Gift Level, 2014-2016 Average



### Most Major Gift Prospects Are Overlooked

Reeher LLC, 2013



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.

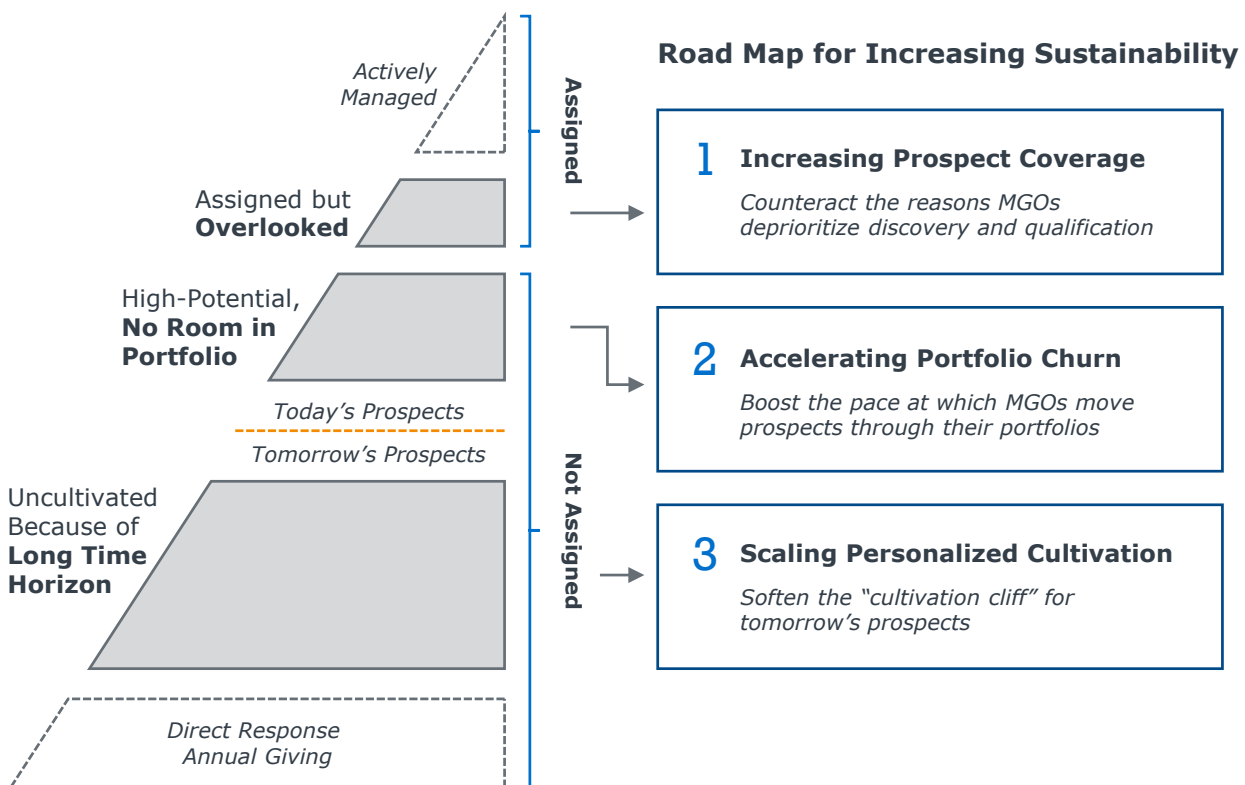
Sources: EAB Advancement Investment and Performance Initiative, 2014-2016; Reeher, <http://info.reeher.com/rs/reeherllc/images/ReeherWhitePaperManagingOfficerActivities.pdf>; Advancement Forum interviews and analysis.

# Top Lessons from the Study (cont.)

## 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.





# The Sustainability Crisis in Higher Ed Fundraising

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SECTION

1

# An Overabundance of Wealth

## Economic Gains at the Top Bring Increased Opportunities

### Breaking News for 2016!

**BUSINESS INSIDER** "Record Number of US Households Achieve Millionaire Status"

### ...And for 2015...

**CNBC** "Record Number of Millionaires Minted in US"

### ...And 2014...

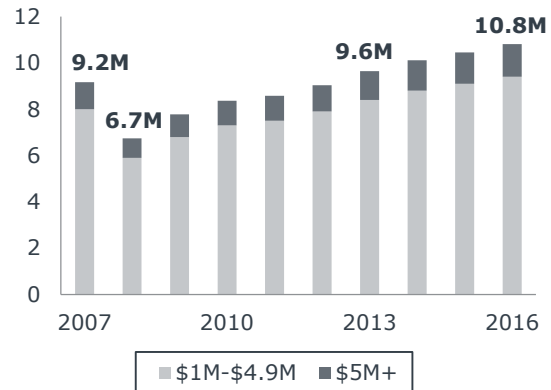
**TIME** "US Millionaires Club Grows to Almost 10 Million"

### ...And 2013

**FOX BUSINESS** "Number of Millionaires in US Hits New High"

### Meteoric Growth in Wealth

US Households with \$1M+ Net Worth<sup>1</sup>



1 in 17

US households in 2008 were millionaire households



1 in 12

US households in 2016 were millionaire households

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.

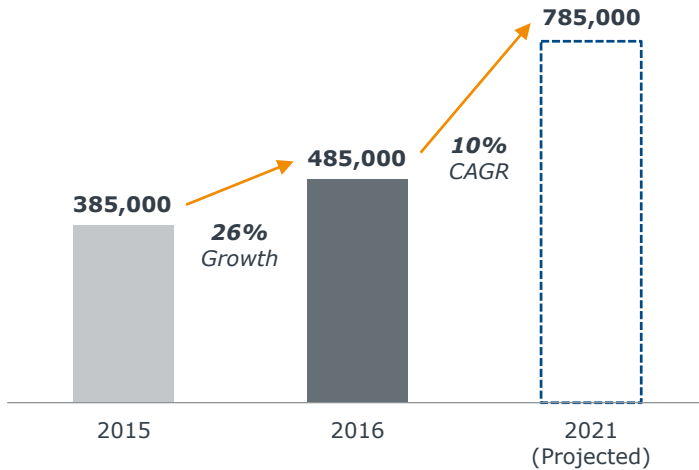
Sources: *Business Insider*, *CNBC*, *Time*, and *Fox Business News*; Spectrem 2017 Market Insights; Statista, "Number of households in the U.S. from 1960 to 2016," <https://www.statista.com/statistics/183635/number-of-households-in-the-us/>; Advancement Forum interviews and analysis.

# Boom Times North of the Border

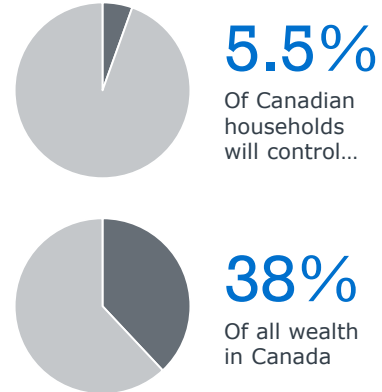
## Canada Also Sees Upswing in Millionaire Households

### A Growing Base of Wealth

Number of Millionaire Households in Canada, 2015-2021



By 2021...



Canada goes from **8<sup>th</sup> in the world** to **5<sup>th</sup> 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.

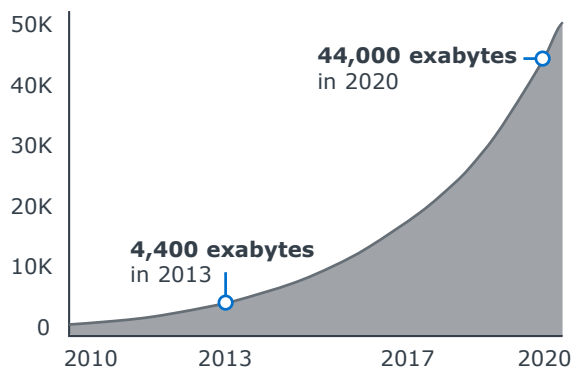
Sources: Beardsley B, et al., "Transforming the Client Experience," *Global Wealth 2017*, [http://image-src.bcg.com/Images/BCG-Transforming-the-Client-Experience-June-2017\\_2\\_tcm9-161685.pdf](http://image-src.bcg.com/Images/BCG-Transforming-the-Client-Experience-June-2017_2_tcm9-161685.pdf); "Canada Ranks 5<sup>th</sup> on List of Millionaire Households," CBC, <http://www.cbc.ca/news/business/boston-consulting-millionaires-1.4164322>; Advancement Forum interviews and analysis.

# The Promise of Big Data

## Wealthy Prospects Are Easier to Find than Ever

### An Explosion of Information

Total Global Exabytes of Data, 2010-2020<sup>1</sup>



The **Oakland A's** revolutionized player recruitment with sabermetrics



**Target** identified and marketed to pregnant customers using purchase data



**EAB** models student-success risks, flags individuals for early interventions

### Data Increasingly Critical to Advancement

**86%** Of advancement shops use **wealth ratings**

**68%** Of advancement shops use **propensity ratings**



**Fundraisers Reap Millions by Using Data 'Gold Mine'**



"There's been such a proliferation of data and decrease in cost. We don't really need more data. **We need our officers to go see the people the data's identified.**"

*Marijana Boone  
Director, Advancement of Services  
College of Charleston*

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.

Sources: Gantz J, D Reinsel, "The Digital Universe in 2020: Big Data, Bigger Digital Shadows, and Biggest Growth in the Far East" (December 2012); EMC, IDC, "The Digital Universe of Opportunities" (April 2014); Lewis M, *Moneyball* (2003); Duhigg C, "How Companies Learn Your Secrets," *New York Times* (Feb. 16, 2012); Ruffalo Noel Levitz, "Advancement Leaders Speak 2017" (2017); Wallace N, "Fundraisers Reap Millions by Using Data 'Gold Mine'," *Chronicle of Philanthropy* (May 5, 2014); Advancement Forum interviews and analysis.

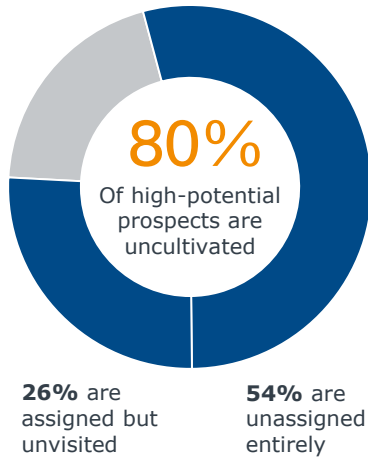
1) 1 exabyte = 1,000,000,000 gigabytes (or 200,000,000 first-generation iPods).

# An Alarming Oversight

Data Analysis Reveals That High-Potential Individuals Often Go Ignored

## Most Major Gift Prospects Are Overlooked

Reeher LLC, 2013



## Poor Pipeline Penetration Leads to Millions in Lost Revenue

Advancement Investment and Performance Initiative, 2014-2016<sup>1</sup>

Capacity Tier	Identified Prospects	Current Gifts in Tier	Minimum Untapped Capacity <sup>2</sup>
\$100K-\$499.9K	2,235	28	\$13,958,143
\$500K-\$999.9K	220	4	\$4,766,141
\$1M-\$9.9M	179	4	\$9,546,403
\$10M+	16	0	\$10,000,000
<b>Total</b>	<b>2,650</b>	<b>36</b>	<b>\$38,270,687</b>

The median institution receives \$100K+ gifts from just **1.4%** of its identified prospects

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.

1) Data presented in this table represent medians.

2) Minimum untapped capacity is calculated based on the revenue that would result if 5% of identified prospects—96 additional donors—gave a gift equal to the average gift for that tier. For example, the average gift between \$100K-\$499.9K is \$172,096. If 5% of all prospects rated \$100K-\$499.9K gave \$172,096, the institution would receive an additional \$13,948,143.

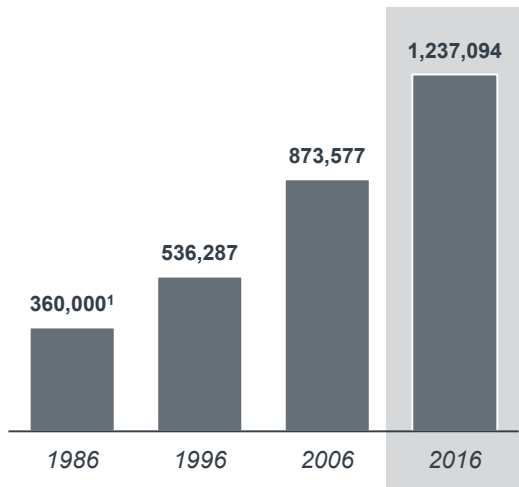
Sources: Reeher, <http://info.reeher.com/rs/reeherllc/images/ReeherWhitePaperManagingOfficerActivities.pdf>; EAB Advancement Investment and Performance Initiative, 2014-2016; Advancement Forum interviews and analysis.

# Losing Mindshare at the Top

## Nonprofits Eager to Capitalize on Our Missed Major-Gift Opportunities

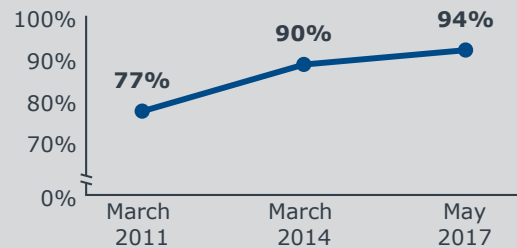
### A Burgeoning Charitable Sector

Number of Public Charities, 1986-2016



### Fighting for Wealthy Donors' Dollars

#### Percentage of Nonprofits Pursuing Major Gifts



#### Share of Nonprofits in a Capital Campaign

**1 in 8** → **1 in 2**  
In a campaign in 2011      In a campaign in 2015

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.

Sources: National Center for Charitable Statistics, "The Number and Finances of All Registered 501(c) Nonprofits"; Arnsberger P, et al, "A History of the Tax Exempt Sector: An SOI Perspective," Internal Revenue Service; Nonprofit Research Collaborative reports, 2011-2017; "Special Report on Nonprofit Fundraising Campaigns" (December 2015); Advancement Forum interviews and analysis.

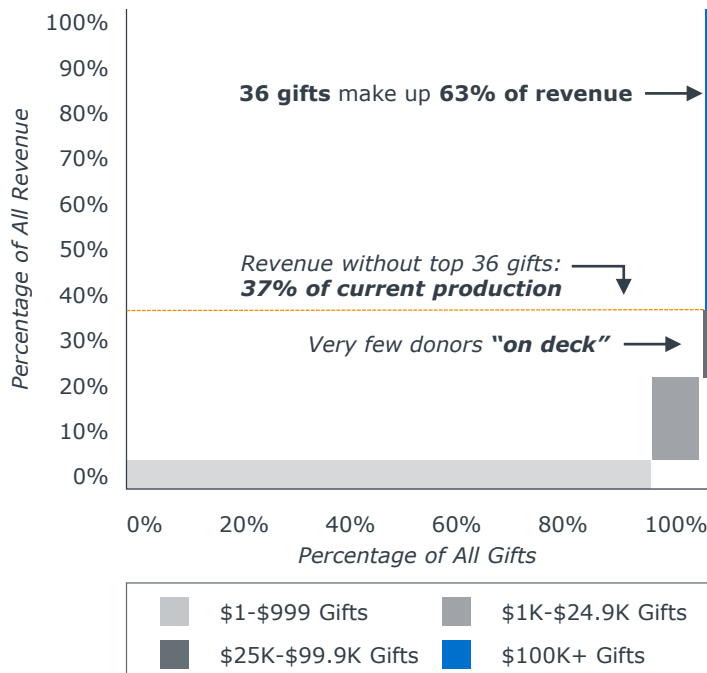
1) Approximate figure for 1986.

# An Unstable Center of Gravity

## Overreliance on Top of Giving Pyramid Creates Unsustainability Risk

### Success Rests on Needle-Thin Donor Segment

Revenue and Gifts by Gift Level, 2014-2016 Average



**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*

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.

Sources: EAB Advancement Investment and Performance Initiative, 2014-2016; Flannery H, et al., “donorCentrics Index,” *Target Analytics* (2015), <https://www.blackbaud.com/files/resources/target-index-results-summary-q4-2015.pdf>; Advancement Forum interviews and analysis.

# Big Campaign Bets Made on Shaky Premises

## Campaign Goals Forge Ahead Despite Unsustainable Underpinnings

### Mega-Campaigns Continue to Grow

EAB Analysis of Longitudinal Campaign Data from 34 Institutions

	Campaign 1	Campaign 2	% Change
Public Launch	1998	2012	--
Total Length	7 Years	8 Years	<b>14%</b>
Median Goal	\$1.225 Billion	\$2.75 Billion	<b>107%</b>
Maximum Goal	\$2.5 Billion	\$9 Billion	<b>260%</b>

### 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.

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.

Sources: CASE, “CASE File: Largest Campaigns in the United States,” [http://www.case.org/Samples\\_Research\\_and\\_Tools/CASE\\_Files/Largest\\_Campaigns/Largest\\_Campaigns\\_United\\_States.html](http://www.case.org/Samples_Research_and_Tools/CASE_Files/Largest_Campaigns/Largest_Campaigns_United_States.html); Advancement Forum interviews and analysis.



# What Will Burst the Bubble?

## CAOs Face Urgent Need to Move Beyond the Usual Suspects



### Demographic Decline

- Older donor population beginning to diminish
- Today's core campaign donors **may not give to next campaign**

**-31.2%**

Decrease in population currently aged 60+ by 2027



### Uncertain Economics

- Some commentators claim economy **overdue for contraction**
- Major/principal gifts drop fastest during downturn

**-31.4%**

Decline in median sum of three largest gifts, 2007-2009



### Shrinking Window of Opportunity

- Unengaged prospects may take **decades to arrive at major gift**
- Other nonprofits win mindshare while we delay

**16 years**

Median time it takes to donors to upgrade to first \$25K gift

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.

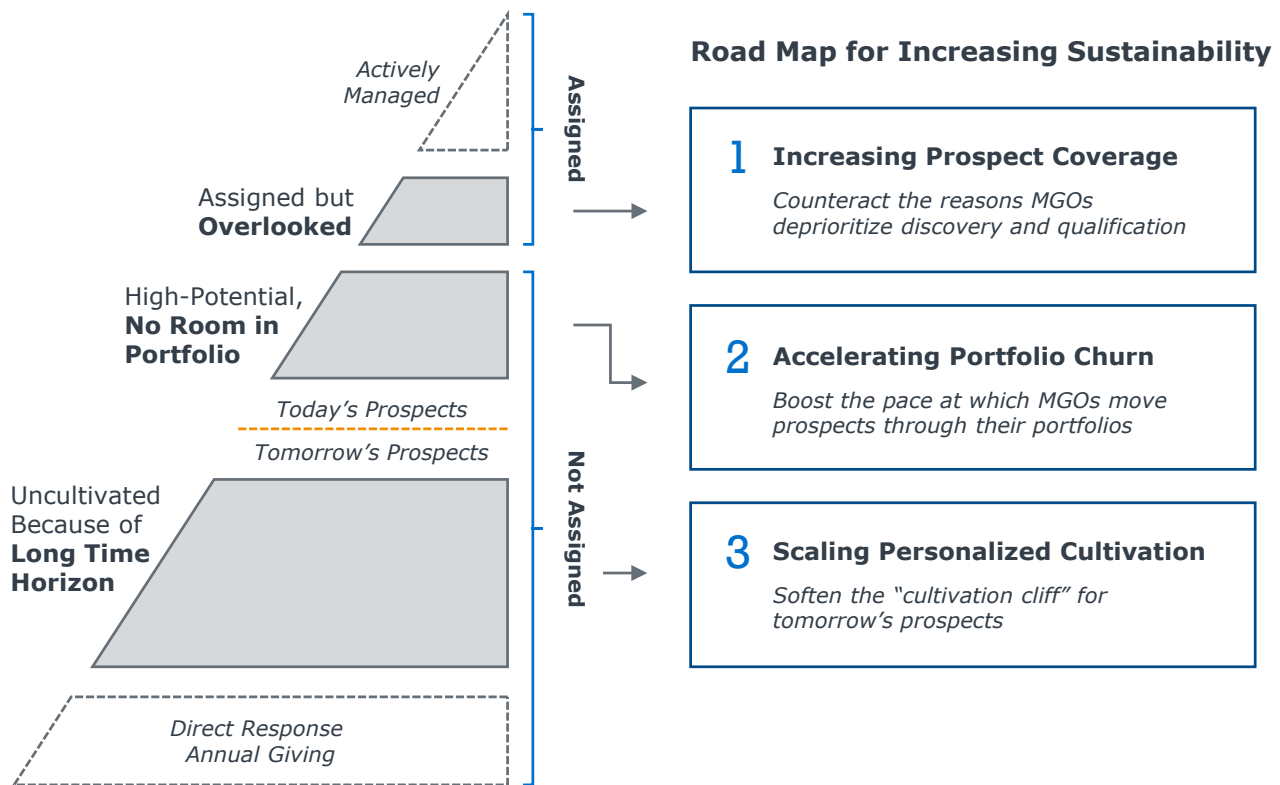
Economic decline poses a real, though unpredictable, risk to higher education fundraising. While no one can say exactly when the next downturn will come, when it does, it's likely to have an outsized effect on major gifts. Organizations with top-heavy giving pyramids are likely to feel the negative effects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

Sources: US Census data; VSE; Bingley C, Gawor B, "The Threat of Declining Alumni Giving Rates to Higher Education Fundraising," Ruffalo Noel Levitz Webinar, March 22, 2016, <https://www.ruffalonl.com/papers-research-higher-education-fundraising/2016/the-threat-of-declining-alumni-giving-rates-to-higher-education-fundraising>; Advancement Forum interviews and analysis.

# New Frontiers in Pipeline Development

## Maximizing Major Gifts from Overlooked Prospects



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.



# Increasing Prospect Coverage

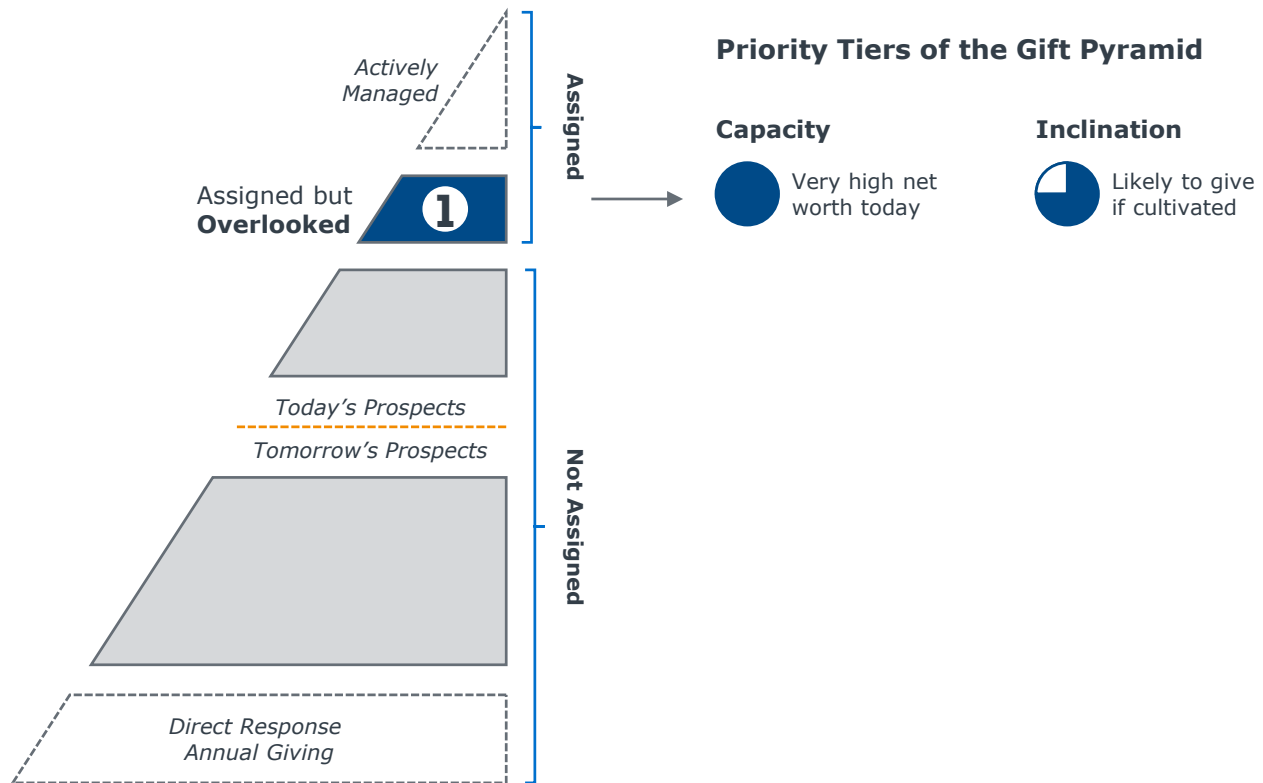
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SECTION

2

# Assignment Does Not Equal Cultivation

## Unmanaged Prospects Within Portfolios Present Outsized Opportunity



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.

# Missed Opportunities Hiding in Plain Sight

## Lack of Engagement with Assigned Prospects Catches Critics' Eyes

“

### The Opportunity Cost of Ignoring Assignments

“Not only are institutions *not* soliciting their best prospects, but the majority of them are probably not even being seen or contacted by anyone.... These development shops are deceiving themselves into thinking they're covering several thousand prospects when all they're really doing is **assigning several thousand prospects to fundraisers who can't possibly visit them all**, much less solicit them.”

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

”

“

### Stockpiling Prospects: An Unproductive Arms Race

“Our development officers were stockpiling prospects in their portfolios and never reaching out to them. A \$1,000,000 prospect whom you've never contacted is worthless. We had to challenge our frontline fundraisers time and again about why they were keeping them. It's the garage mentality—they want to hoard them because **they don't want anyone else to have them, but they don't know what to do with them.**”

*Assistant Vice President  
for University Advancement  
Public Research University*

”

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.

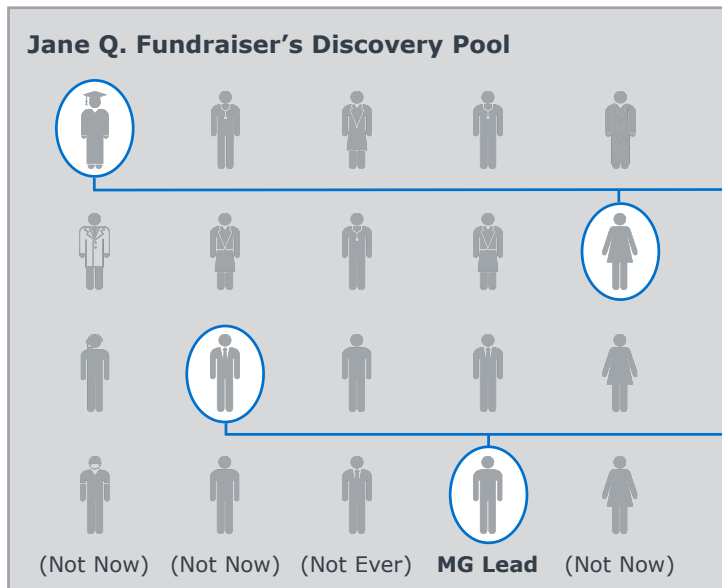
In many instances, institutional priorities and misaligned incentives contribute to the problem. Advancement leaders want to demonstrate to their presidents and boards that they are paying attention to the institution's highest potential prospects. To do so, they assign them in great numbers to fundraisers, 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

### Strong Odds for Major Gift Wins in the Pipeline



### Likelihood of First-Time Visit Leading to \$10K+ Gift

Reeher LLC, 2013



“**Certain institutions [achieve] higher than 50 percent** conversion rates for first-time visits.”

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 Just for Tomorrow's Dollars

## Developing the Pipeline Correlates with MGOs Exceeding Goal

### Same Hours Spent in the Field...

*Time Spent Fundraising by MGO Performance Quartile*

**Top Quartile**  
n=28



**16.6**

Hours

**Bottom Quartile**  
n=31



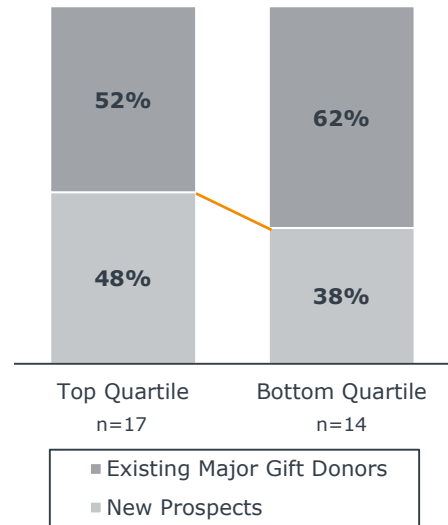
**16.2**

Hours



### ...But More Time With New Prospects

*Division of Time Spent with Prospects by MGO Performance Quartile*



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.

Sources: 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.

# 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

“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*



### Discomfort with Cold Calling

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

“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*



### The “Tyranny of the Immediate”

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

“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.



# 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*



Oregon State  
University

High-Impact  
Discovery  
Scheduling

### **Approach #3:**

#### **Create "Act Now" Urgency**

*Alter discovery's "choice architecture" to incentivize MGOs to take action*



Digital Pipeline  
Nudges

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.

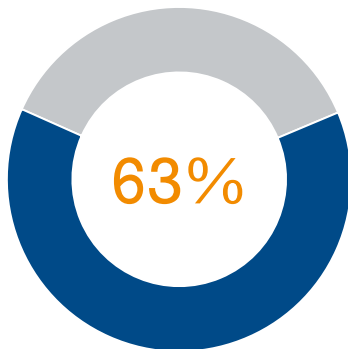
We will begin with increasing confidence in prospect potential.

# A Lack of Confidence in Assigned Prospects

## MGOs Look at Unqualified, “Cold” Prospects with Skepticism

### A Crisis of Faith Among MGOs

Ruffalo Noel Levitz, 2017



Of assigned discovery prospects **should not have been assigned**, according to MGOs



“

### An Unflattering View of How We Prioritize Prospects

“Follow-up interviews with survey respondents indicated prospects were often **assigned ‘randomly’ or ‘in bulk’ based on wealth rating**. Gift officers reported significant frustration with the time spent setting up and completing qualification visits that did not ultimately lead to gifts.”

Ruffalo Noel Levitz  
*Advancement Leaders Speak 2017*

”

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.

# Surfacing Warm Leads via Non-MGOs

## Alumni Relations Referral Form Points to Engaged Prospects

### Marquette University's Alumni Relations Prospect Referral Form

**Wealth Indicators**

*Pay attention to **clues 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**

*Wealth Range*

- \$10M+
- \$5M-\$9.9M
- \$1M-\$4.9M
- ...

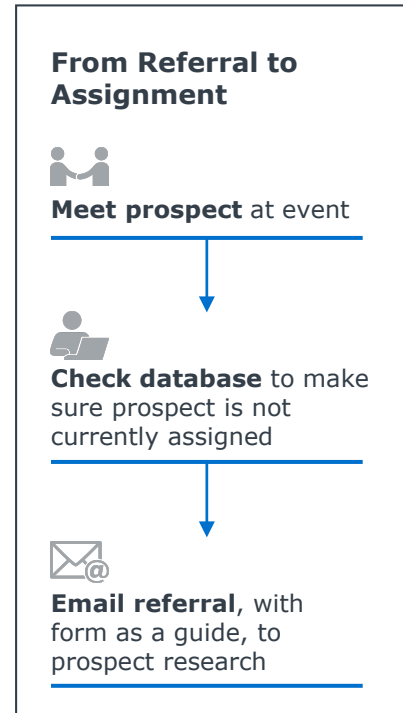
*Prospect Status*

- Not now
- Not ever
- Child of wealth
- Rising star

Tips on qualification technique

Extensive list of what to listen for

Beginner's guide to classifying potential



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.

# Beyond the Usual Prospect Intel

## Referral Form Gets the Cultivation Ball Rolling

### Initial Success at Launch, and...

*Referral Form Results, 2014*

3

**Major donations** made by prospects surfaced through alumni relations leads

\$50K

**Endowment** given as a result of alumni relations lead

### ...Continued Success Through the Years

*Referral Form Results, 2017*

24-60

Previously unidentified **major-gift prospects** referred annually

80%

Of referred prospects have high **major gift capacity**

### A Sharp Tool in the Identification Toolbox

“Our prospect referral process has been very effective. It supplements other prospect identification work, and has helped us **zero in on excellent prospects.**”

*Stacy Mitz, Assistant Vice President for Engagement  
Marquette University*

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.

# Practice 2: Student Caller Lead Generation

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## 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 employ 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

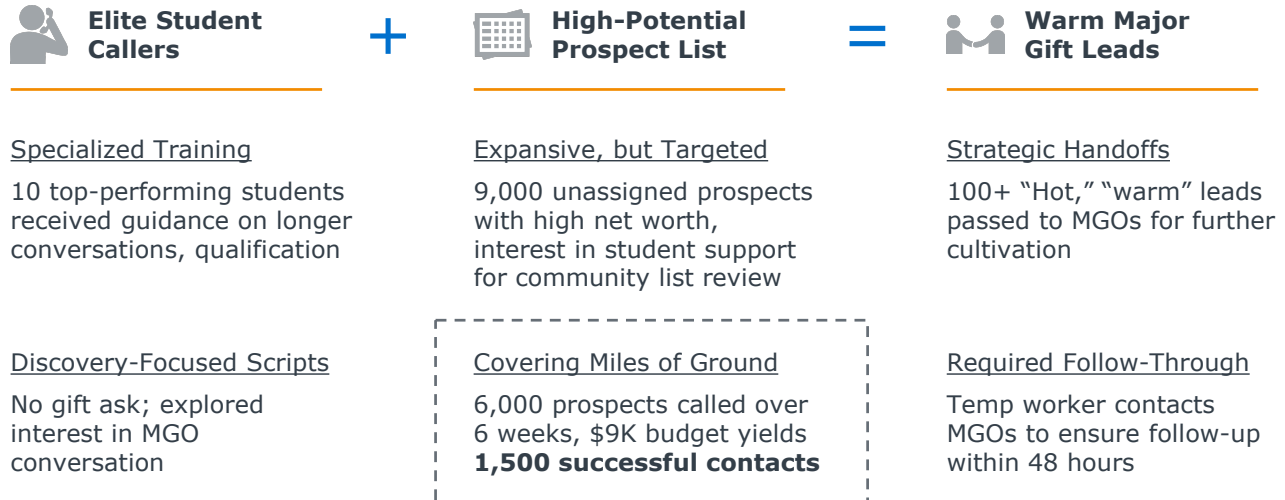
University of Michigan

- 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



During a recent pilot, the University of Michigan took a proactive approach to surfacing 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.

# 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

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

**\$4M+** In **gift proposals** tagged to previously unassigned prospects since initiative

**119** Prospects now **assigned a prospect manager** and in an active portfolio

## 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*

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.



# 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*



Oregon State University

High-Impact Discovery Scheduling

### **Approach #3:**

#### **Create "Act Now" Urgency**

*Alter discovery's "choice architecture" to incentivize MGOs to take action*



Digital Pipeline Nudges

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.

# Everyone's Least Favorite Job

## Cold Calling Ranks Low on Preference Lists, Imperiling Pipeline Efforts

### A Crisis of Faith in the Business World

**63%** Of salespeople say cold calling is what they **dislike most** about their jobs

**91%** Perceived **rate of ineffectiveness** of cold calling, according to salespeople

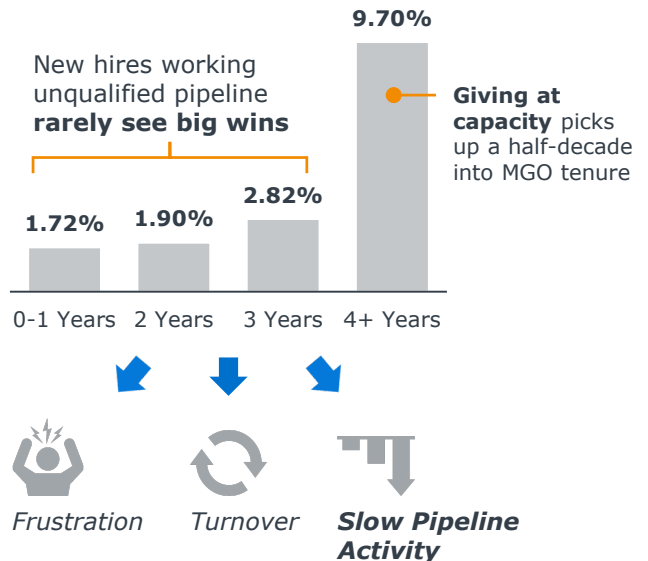
#### Fundraisers, Too, Hate Blind Outreach

"We hired a bunch of senior development officers based on our wealth screening. They came in expecting a portfolio of well-cultivated six- and seven-figure **prospects to be handed to them on a platter**. When they learned how much cold calling they'd be doing, they weren't happy at all."

*Vice President of Advancement  
Public Research University*

### Lots of "No's" from the Pipeline

Percentage of Portfolio Capacity Secured in Gift Income by Fundraiser Tenure, 2014



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.

Sources: "Stop Cold Calling!" Cold Calling Sucks, <http://www.nomorecoldcalling.com/stop-cold-calling/>; Brudner E, "6 Data-Driven Reasons Why Cold Calling Flat Out Sucks," HubSpot, <https://blog.hubspot.com/sales/cold-calling-flat-out-sucks>; Advancement Forum interviews and analysis.

# Practice 3: Discovery Visit Likelihood Scoring

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## 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

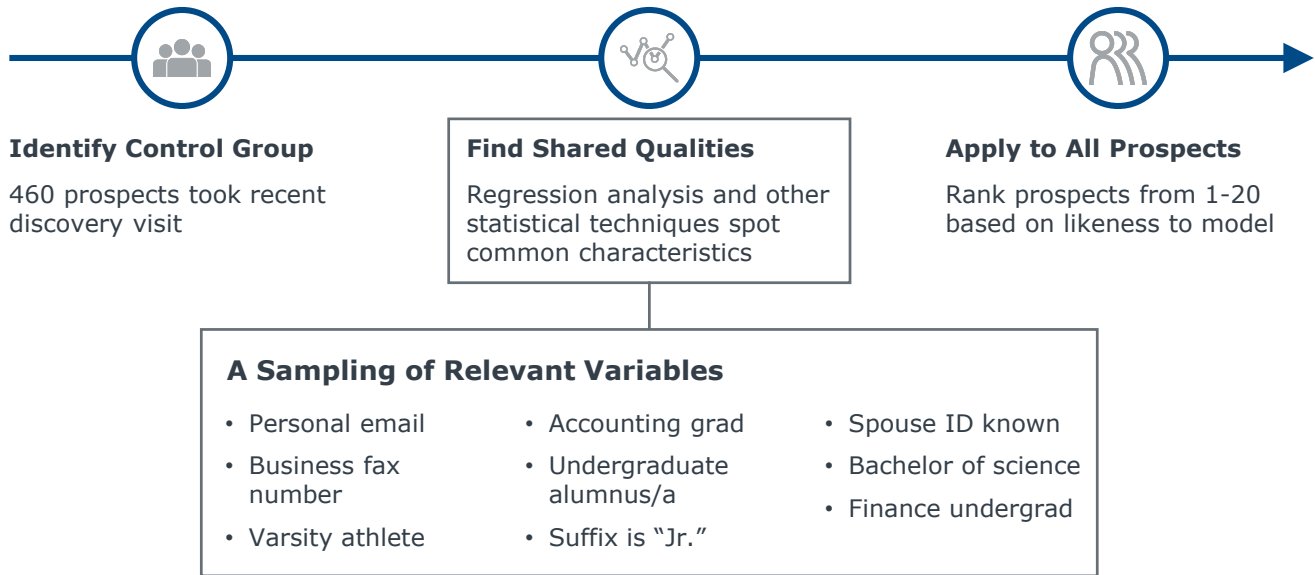
Bryant University

- Institutional control: Private
- Enrollment: 3,698 (3,462 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Large Suburb (Smithfield, RI)

# Guiding MGOs to the Most Likely Visits

Discovery Visit Likelihood Score Ensures Warmest Prospects Rise to Top

## Bryant University Turns to Big Data in Discovery



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.

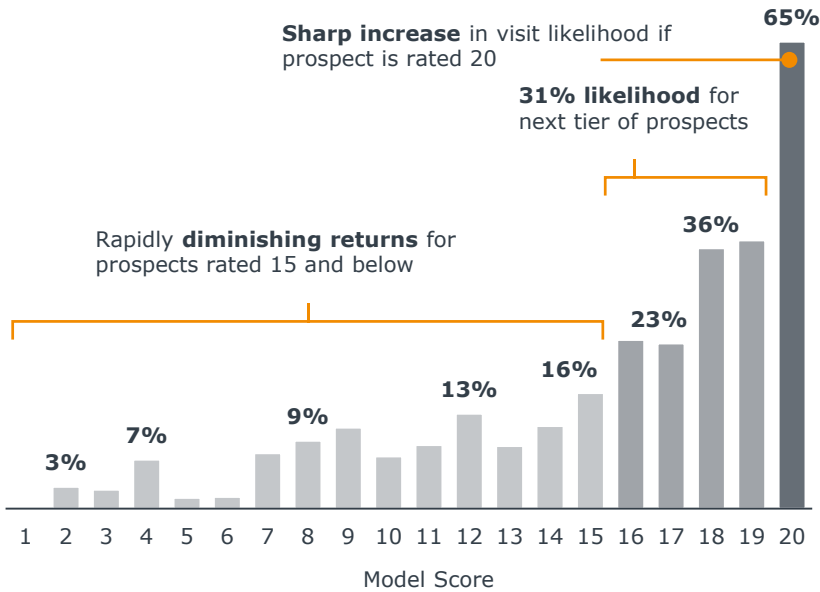
The team formulated this visit likelihood into a score from 1 to 20 and assigned a score to all prospects in the database.

# Data Mining Improves Efficiency

## Fundraisers Accurately Target Warmest Prospects with Scoring System

### A Road Map for Prioritizing Outreach

Percentage of Prospects Who Take Discovery Visit by Rating



### 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

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.

# Practice 4: Social Media Discovery Targeting

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## 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

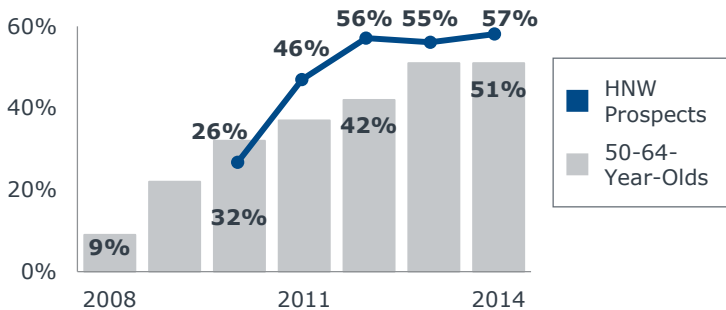
- Institutional control: Public
- Enrollment: 30,354 (25,327 undergraduate)
- Carnegie classification: Research University
- Campus setting: Small City (Corvallis, OR)

# 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



### Social Media Key in Philanthropic Decisions

**46%** Of wealthy donors consult social media when making philanthropic decisions

**80%** Of donors follow at least one nonprofit on social media

### 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*

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.

Sources: Frank R, “Millionaires Prefer Facebook,” *CNBC*, 2014, <http://www.cnn.com/2014/07/18/millionaires-prefer-facebook-over-twitter.html>; Spectrem Group, “Social Media Usage,” <http://spectrem.com/Content/Social-Media-Usage-Among-Wealthy-Investors.aspx>; Frank R, “Millionaires Pile into Facebook,” *CNBC*, 2011, <https://blogs.wsj.com/wealth/2011/08/17/millionaires-pile-into-facebook-drop-twitter/>; Spectrem Group, “Facebook Usage,” <http://www.marketwired.com/press-release/millionaires-use-of-facebook-has-nearly-doubled-since-last-year-1550031.htm>; US Trust Study, “High Net Worth Philanthropy,” 2016, [http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp\\_ARMCGDN7\\_oct\\_2017.pdf](http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp_ARMCGDN7_oct_2017.pdf); Burk Donor Survey, 2016; Advancement Forum interviews and analysis.

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.

# Online Engagement as a Discovery Proxy

## Prospects Engaged Exclusively on Social Media Slipped into Discovery Pools

### Oregon State University MGOs Include New Group in Discovery Outreach



#### “Control Group” Prospects

- High score in OSU affinity model
- **No social media engagement**



#### Experimental Prospects

- No engagement score in OSU affinity model
- **High level of social media engagement**

**Evertrue Filters Surface Socially Engaged Prospects**

Filters ^ Rated? AND Major Market AND InDiscovery AND 1 more...  
1,973 constituents

AND OR

Rated?  Yes  No  **\$25K+ Capacity**

Major Market is Tier 1 Portland Metro  **Portland-based**

InDiscovery  Yes  No  **In Discovery**

Engaged on Facebook?  Yes  No  **Social Score: 5**

**Prospecting Criteria**

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.

# 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

### 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

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.

# Specialization Brings Stronger Results

## Expert Schedulers Book Visits at High Rate

### Securing Prospect Visits...

**378** Meetings scheduled annually

**30%** Of outreach efforts (to mostly cold prospects) result in a visit

### ...And Leading to Gifts

**\$585K** Raised from scheduler-booked visits across past two years

**\$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.

# 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*



Oregon State  
University



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.

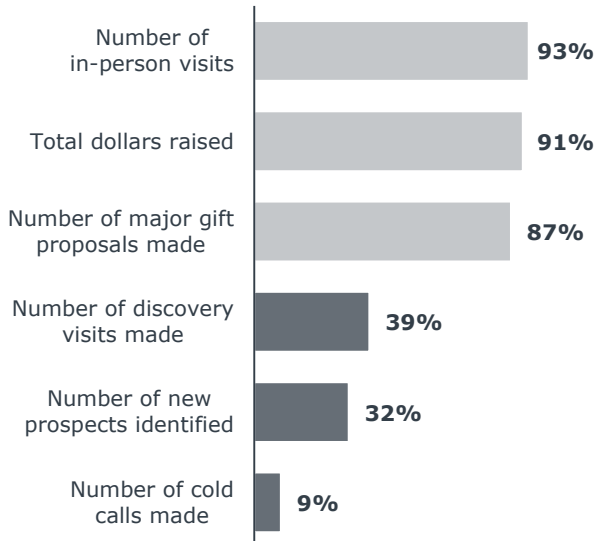
Nudging gift officers toward the pipeline ultimately helps them manage their workflows and make room for pipeline activities among today's short-term pursuits.

# The ‘Tyranny of the Immediate’

## MGOs Evaluated on Short-Term Production, Not Pipeline Cultivation

### New Prospects Ignored in MGO Metrics

Percentage of Shops Reporting Use of Metric, 2014



### 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*

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.

# Practice 6: Digital Pipeline Nudges

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## 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

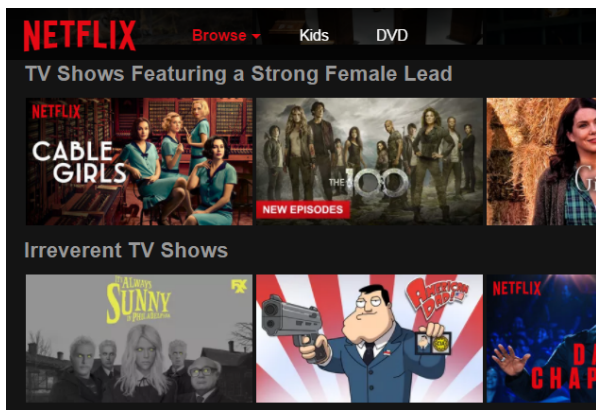
University of Southern California

- Institutional control: Private
- Enrollment: 43,871 (18,794 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Los Angeles, CA)




# The ‘Nudge’ Principle for Fundraising

Just-in-Time Recommendations More Actionable Than Huge Discovery Lists

## Applying Tech’s “Suggestions” Model...



## ...to MGO Workflow Management

-  **Automated Prompts**  
Proactive pushes ensure priority prospects get MGO mindshare
-  **Small Number of Action Items**  
One or two “to dos” at a time increases likelihood of action
-  **Personalized Recommendations**  
Prospects recommended based on interest, giving history, capacity

## A More “Manageable” Approach to Prospect Management

“The **era of sending people big lists is over**. We can only ask our officers to prioritize so many things at once before it just becomes completely unmanageable. We’re moving toward sending them just one or two prospects, one or two tasks, at a time.”

*Ashutosh Nandeshwar,  
Assistant Vice President, Relationship Management and Data Sciences  
University of Southern California*

The principles of behavioral economics, long a staple of the commercial and tech worlds, have begun to make their way into MGO management strategies.

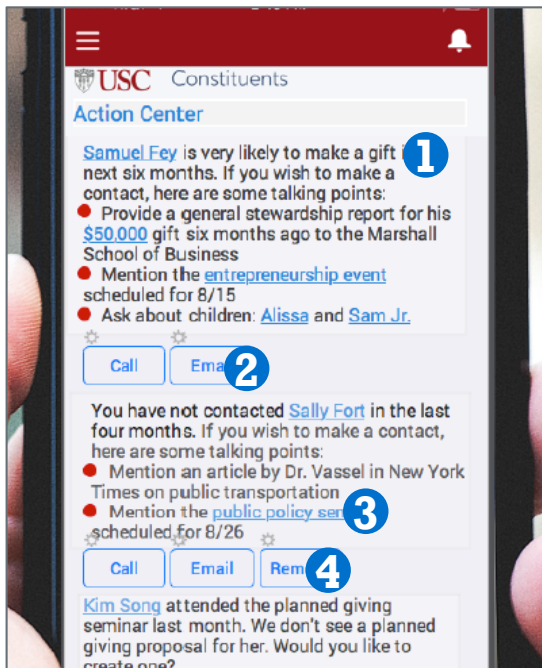
The “nudge”—a behavioral economics strategy of presenting choices in ways that subtly influence the ultimate decision a user or customer makes—has shaped the way commercial organizations build their customer experiences. Especially in the world of technology, most users’ interactions with organizations 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.



# Pipeline Nudges on the Go

## Mobile Prompts Remind MGOs to Contact Overlooked Prospects



### 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<sup>1</sup>

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) Currently in development

Source: Advancement Forum interviews and analysis.

# Your Next Big Donor, c/o Predictive Analytics

Machine Learning Suggests 'Prospects You May Be Interested In'

## University of Southern California's Salesforce Platform<sup>1</sup>

The screenshot displays the USC Salesforce interface. At the top, navigation tabs include Home, Organizations, **Constituents**, Opportunities, Reports, Briefings, Contact Reports, Strategies, and Rese. The main header shows the USC logo and a constituent profile for John Doe. Below this is a 'Constituent Summary' table with fields: Preferred Name, Recognition Name, Primary Constituent Type, Constituent Type, Stage of Readiness, Top 25 Prospect, Preferred Phone, and Current Home Address. To the right of the summary are 'Override' checkboxes. A section titled 'Prospects you may be interested in' lists two prospects: Susana Harwell (\$1,000,000-\$2,499,999, Palo Alto, CA, 85% likely to give) and Kera Sebesta (\$2,500,000-\$4,499,999, Santa Clara, CA, 70% likely to give). Callout boxes provide context: 'Algorithm bases suggestions on browsing behavior' points to the prospect list; 'Two suggestions at a time avoids overwhelming MGO' points to the two prospect cards; 'Key information (estimated capacity, location) previewed on prospect page' points to the prospect details; and 'Likelihood to give helps MGOs prioritize follow-up' points to the likelihood percentages.

Constituent Summary	
Preferred Name	
Recognition Name	
Primary Constituent Type	
Constituent Type	
Stage of Readiness	
Top 25 Prospect	
Preferred Phone	
Current Home Address	

**Prospects you may be interested in**

- Susana Harwell**  
\$1,000,000-\$2,499,999  
Palo Alto, CA  
85% likely to give
- Kera Sebesta**  
\$2,500,000-\$4,499,999  
Santa Clara, CA  
70% likely to give

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.

1) Currently in development

Source: Advancement Forum interviews and analysis.

# Prioritization Guide

## Speeding Implementation and Ensuring Follow-Through

### 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.

Tactic	My Institution Should Prioritize This Tactic	Notes and Next-Steps
<p><b>Alumni Relations Prospect Referral Form</b> <i>Marquette University</i></p> <p>Alumni relations staff record key intel about their interactions with prospects to send to prospect research for review and assignment.</p>	<p>1 2 3 4 5</p> <p>Disagree Agree</p>	
<p><b>Student Caller Lead Generation</b> <i>University of Michigan</i></p> <p>Top-performing student callers contact highly rated, unassigned prospects to gauge their philanthropic interest and pass leads to major gift officers.</p>	<p>1 2 3 4 5</p>	
<p><b>Discovery Visit Likelihood Scoring</b> <i>Bryant University</i></p> <p>A regression analysis of the common characteristics of prospects who take discovery visits helps MGOs prioritize the warmest uncultivated leads.</p>	<p>1 2 3 4 5</p>	
<p><b>Social Media Discovery Targeting</b> <i>Oregon State University</i></p> <p>Prospects with high levels of engagement with the university on social media are prioritized for qualification visits.</p>	<p>1 2 3 4 5</p>	

# Prioritization Guide (cont.)

## Speeding Implementation and Ensuring Follow-Through

Tactic	My Institution Should Prioritize This Tactic	Notes and Next-Steps
<p><b>Dedicated Discovery Schedulers</b>  <i>Rochester Institute of Technology</i>                      Staff members are dedicated to visit outreach and scheduling meetings with hard-to-reach prospects.</p>	<p>1 2 3 4 5  <i>Disagree Agree</i></p>	
<p><b>Digital Pipeline Nudges</b>  <i>University of Southern California</i>                      Tech tools “nudge” gift officers to engage their pipeline prospects.</p>	<p>1 2 3 4 5</p>	



# Accelerating Portfolio Churn

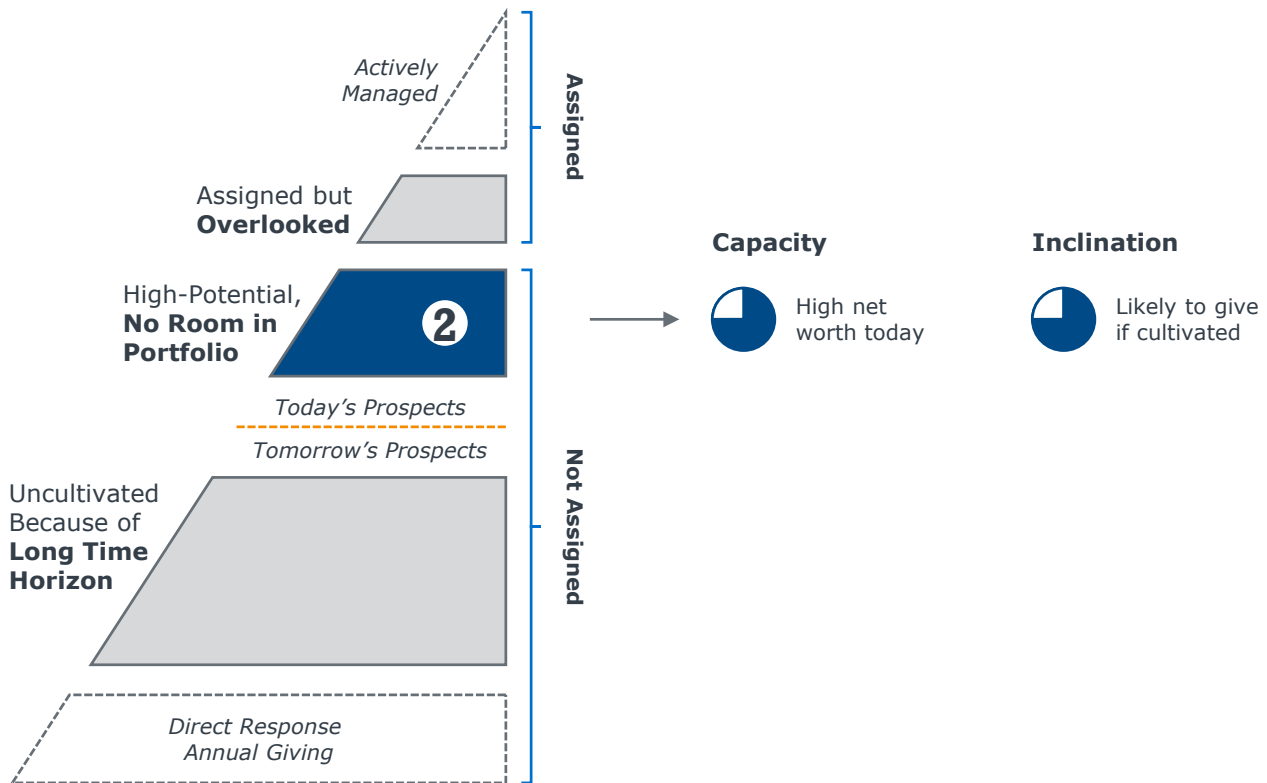
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SECTION

3

# Flying Under the Radar

## Legions of Prospects Should Be Assigned but Aren't



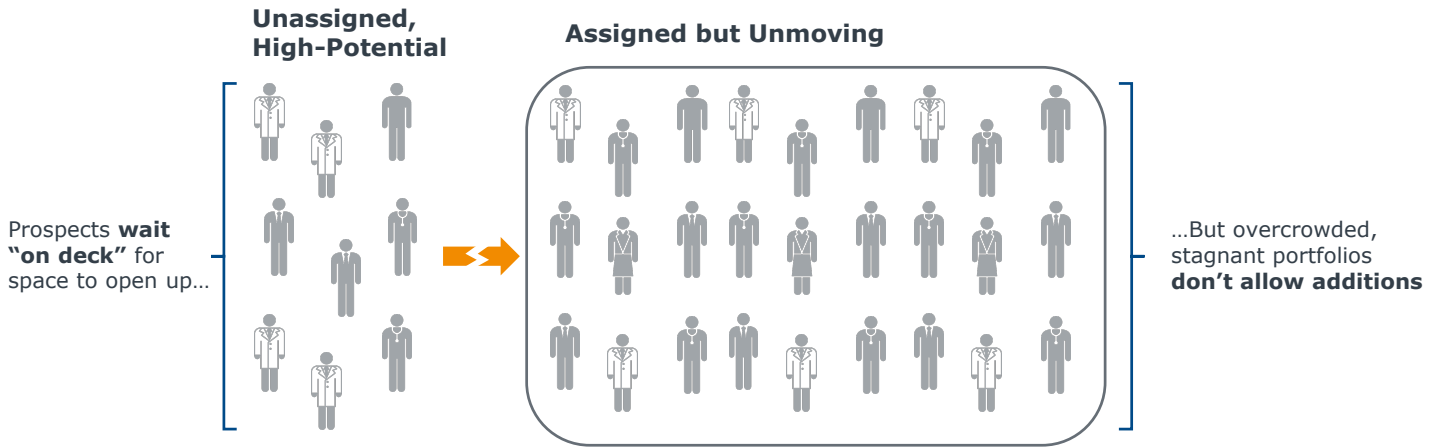
In this section, we'll focus on high-potential prospects who are not currently assigned to major gift officers.

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.

# Bottlenecks in the Pipeline

Stagnant Portfolios Impede Efforts to Capitalize on Discovery Gains



## Portfolio Age Nearly Matches Average MGO Tenure

**3.2** Average number of years prospects have been assigned at three EAB member institutions

**3.5** Average number of years central major gift officers have been employed at their institution

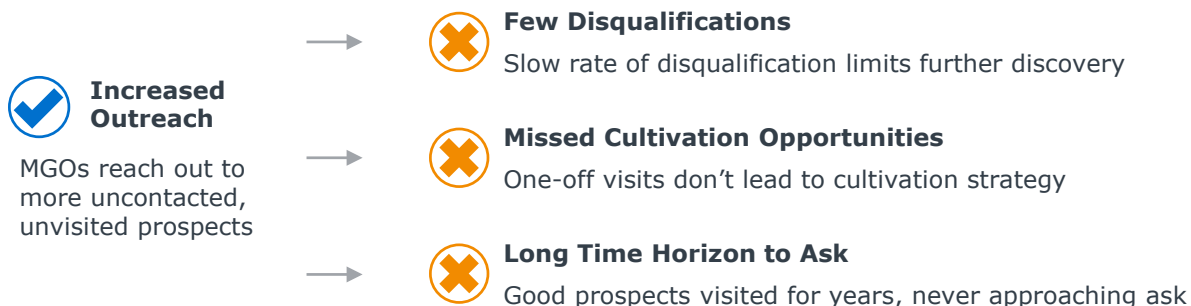
At most institutions, bottlenecks in the pipeline account for the large number of prospects sitting outside of portfolios. There simply isn't any room in portfolios to accommodate them.

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.

Sources: Eduventures, "Compensation Benchmarks for Key Development Positions 2013 Update" (2013), <http://www.eduventures.com/2013/06/the-tenure-problem-how-can-we-make-major-gifts-productive-if-gift-officers-keep-leaving/>; Advancement Forum interviews and analysis.

# Expanding Coverage Is Just the Start

## Current Prospect Management Strategy Limits Pipeline Development



### 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*

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.

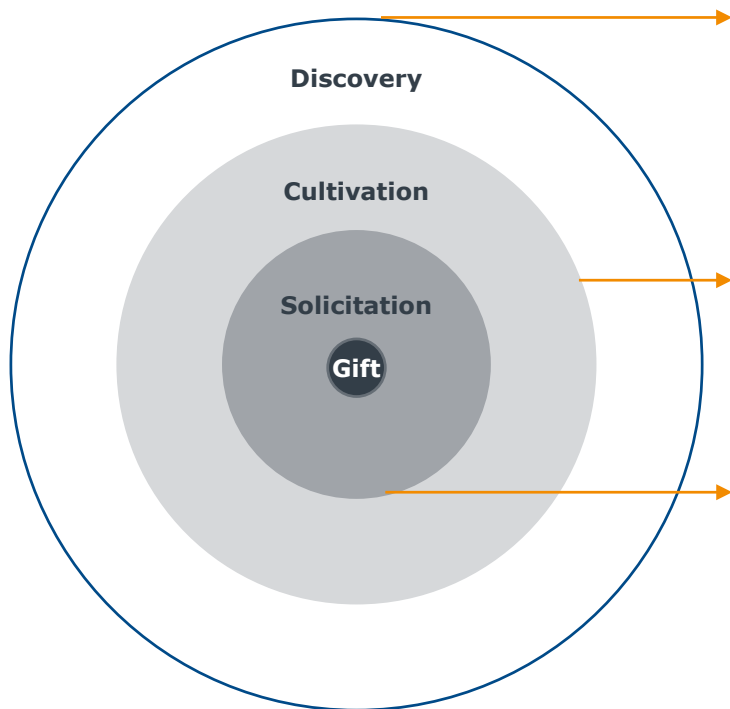
Lastly, even a well-managed series of moves can drag on for years without a proactive ask timeline. Long time horizons leading up to the ask may run past an MGO's departure from the institution, and when a new MGO comes in, the institution must hit “reset” on the relationship.



# Accelerating Portfolio Churn

## Expediting Prospect Movement to Expand Pipeline Coverage

### Jane Q. Fundraiser's Portfolio



#### 1 Destigmatize Disqualifications

Elevate MGO comfort with moving prospects out of portfolios

#### 2 Hardwire Cultivation Next-Steps

Ensure strategy formation follow-through after productive discovery visits

#### 3 Expedite the Ask

Shorten the fundraising lifecycle by time-boxing cultivation stages

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.

# Practice 7: 'Reasonable Attempt' Contact Criteria

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## 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 are 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)


# Setting a Standard for ‘Reasonable Attempts’

## New Metric Clarifies When MGOs Should Let Prospects Go

### George Washington University Persistently Contacts Discovery Prospects

 "MGOs must make **two attempts** through **two channels** for **four consecutive quarters**."

- 
- **Winter:** Email followed by phone call
  - **Spring:** Commencement invitation and email
  - **Summer:** Call and internal strategy meeting
  - **Fall:** Letter and email

 If still unresponsive, **prospect is removed from portfolio**, coded "not a prospect now," and reviewed in the future

### A Tenacious Approach to Pipeline Outreach

#### Multiple Channels...

 Email  Mail  Phone

#### ...With Multiple Asks...

 Visits  Events

#### .... And Multiple Plans

 Strategy Formation  Planning Session

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 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."

# 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.

# Practice 8: Automatic Prospect Sunsetting System

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## 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

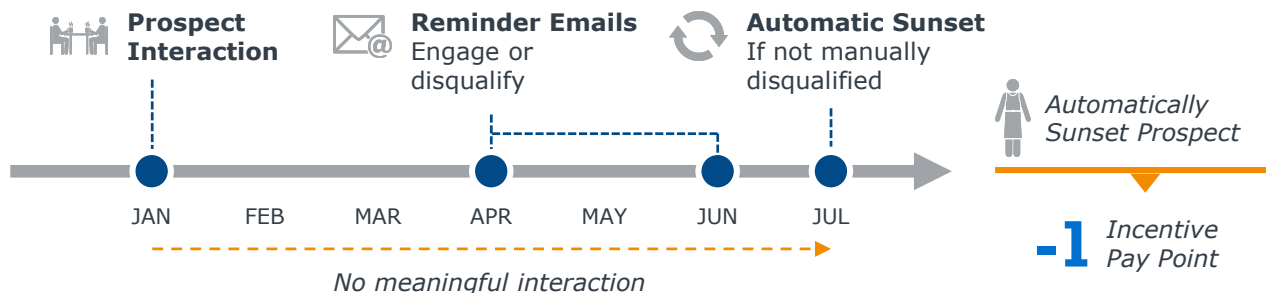
Colorado State University

- Institutional control: Public
- Enrollment: 31,856 (25,177 undergraduate)
- Carnegie classification: Research University
- Campus setting: Midsize City (Fort Collins, CO)

# A Forcing Function for Portfolio Maintenance

## MGOs Who Don't Disqualify Put Incentive Pay at Risk

### Colorado State University's Automatic Sunsetting System



#### 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*

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.

# Skyrocketing Performance

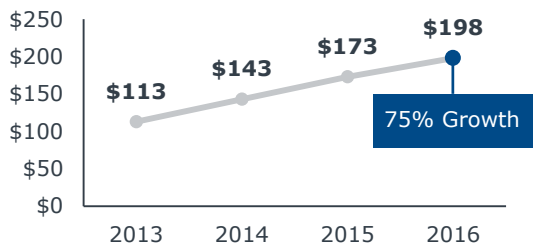
## Diligent Pipeline Management Supports Huge Top-Line Growth

### Faster Portfolio Churn Promotes Fresh Pipeline

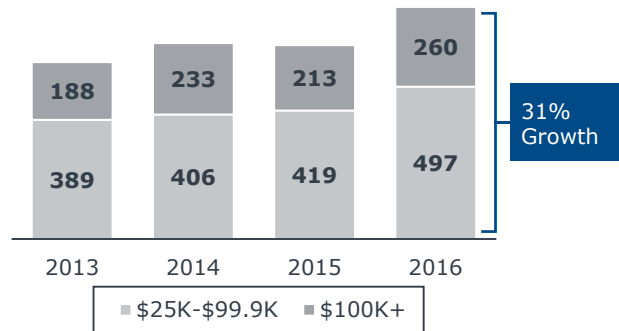
Pipeline Metric	2015	2017	2-Year Change
Sunset Automatically	209	31	-85.2%
Dropped Manually	1,893	2,498	32.0%
<b>Total Unassignments</b>	<b>2,102</b>	<b>2,529</b>	<b>20.3%</b>

### Monumental Fundraising Growth at Colorado State

Total Fundraising Production (in Millions), FY2013-FY2016<sup>1</sup>



Number of \$25K+ Gifts, FY2013-FY2016



Automatic sunseting 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.

1) "Fundraising production" is defined as the full face value of new gifts and pledges.

Sources: EAB Advancement Investment and Performance Initiative, 2014-2016, 2013-2016; Advancement Forum interviews and analysis.



# Practice 9: Discovery Officer Referral Process

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## 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.*

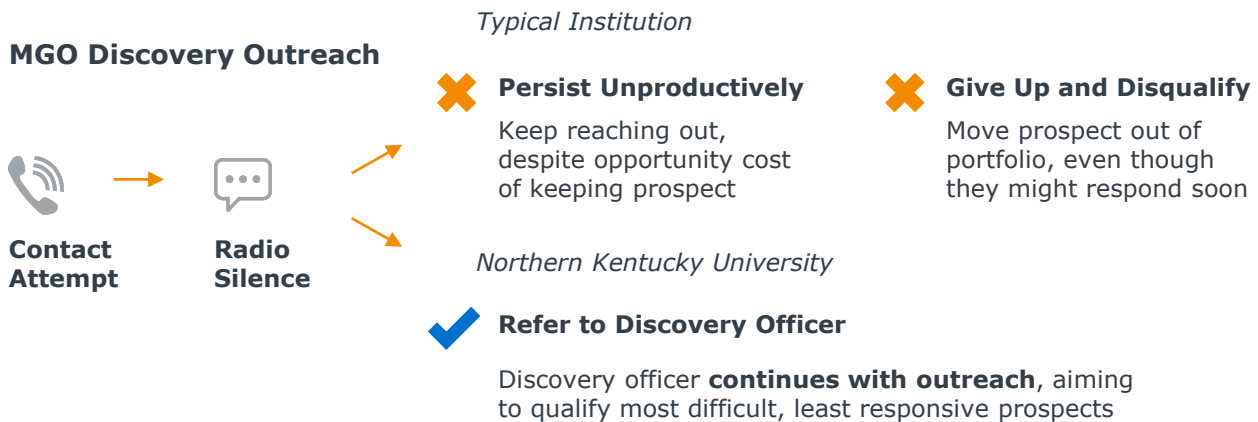
### Institution Profiled

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



### A Portrait of the Discovery Officer

Staff of three discovery fundraisers focuses on the pipeline:

- **Large portfolio** (200+ prospects)
- **High-volume outreach** (100 contacts/month)
- **High visit goals** (20/month)
- **Low response rate** (20% v. MGOs' 50%)

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 officers 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.

# 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.

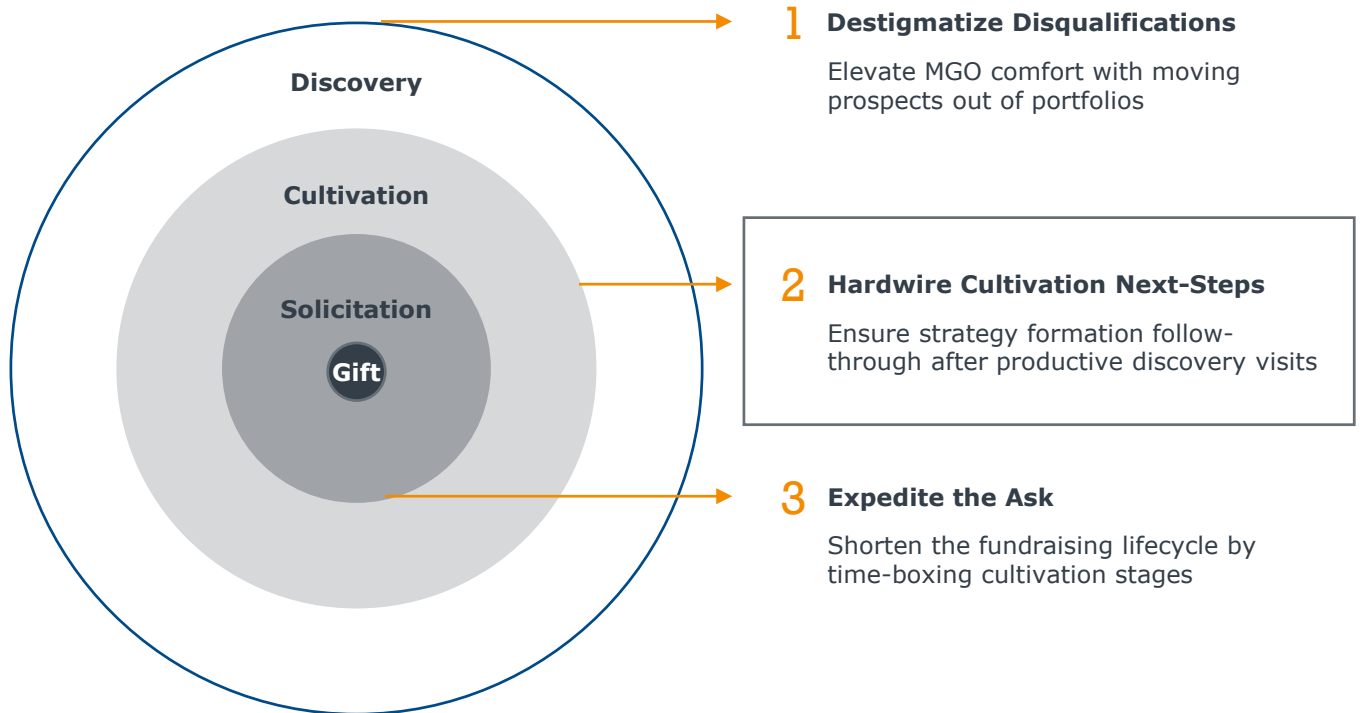
Their high-volume, high-velocity approach to outreach and visits ensures successful engagement of the next tier of the pipeline.

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.

# Accelerating Portfolio Churn

## Expediting Prospect Movement to Expand Pipeline Coverage

### Jane Q. Fundraiser's Portfolio



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.

# 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.

# Practice 10: Stage-Change Metrics

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## 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)

# Rewarding the Move to Cultivation

## Stage-Change Metrics Shift Focus from Visits to Strategy

### Getting Stuck in Qualification

“My colleague Eric Rosario, the then Senior Director of Prospect Development and Leadership Gifts, and I realized that the portfolios had become too heavily weighted with prospects in qualification, and these prospects were not moving quickly enough. We had cases of prospects taking a visit every year, letting the fundraiser buy them lunch, but not increasing their giving. **We needed to move more prospects into cultivation.**”

*Michael Wesley, Director of Prospect Development & Strategic Research  
Ithaca College*

### Ithaca College’s Stage-Change Metrics



#### Deemphasize Visit Count

Downplay one-off visits that do not meaningfully advance cultivation



#### Reward Moves into Cultivation

Track number of prospects who move from “qualification” to “cultivation” in donor management system



Have we built a **cultivation strategy**?



Have we set an expected **ask date**?



Have we secured **follow-up visits**?



Have we engaged **campus partners**?

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.

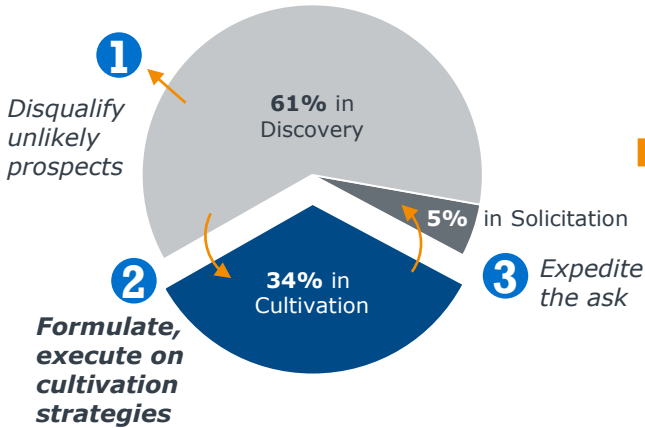
# A Seismic Shift in Portfolio Composition

Ithaca Engineers Metric System to Realign Center of Gravity to Cultivation

*Current State*

**Few Prospects Moving to Cultivation**

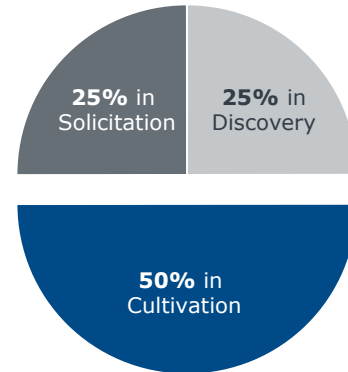
*Average FY2016 Portfolio Composition*



*Next Year's Goal*

**More Activity Leading to Cultivation**

*Intended FY2018 Portfolio Composition*



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

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## 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

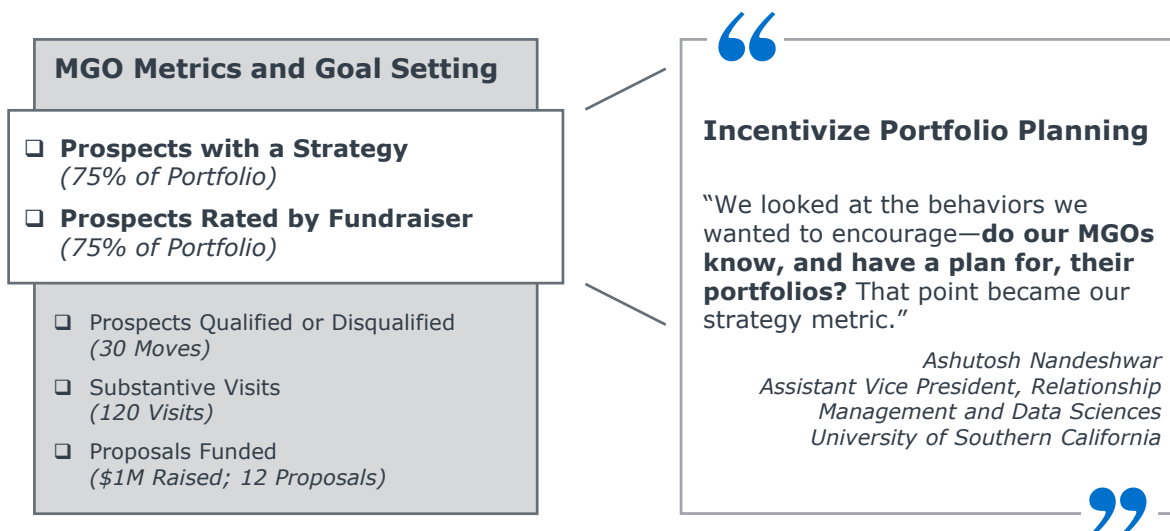
University of Southern California

- Institutional control: Private
- Enrollment: 43,871 (18,794 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Los Angeles, CA)

# Measuring Follow-Through

## Pipeline Metrics Include Cultivation Planning

### USC Gift Officers Evaluated on Moving Prospects Through Pipeline



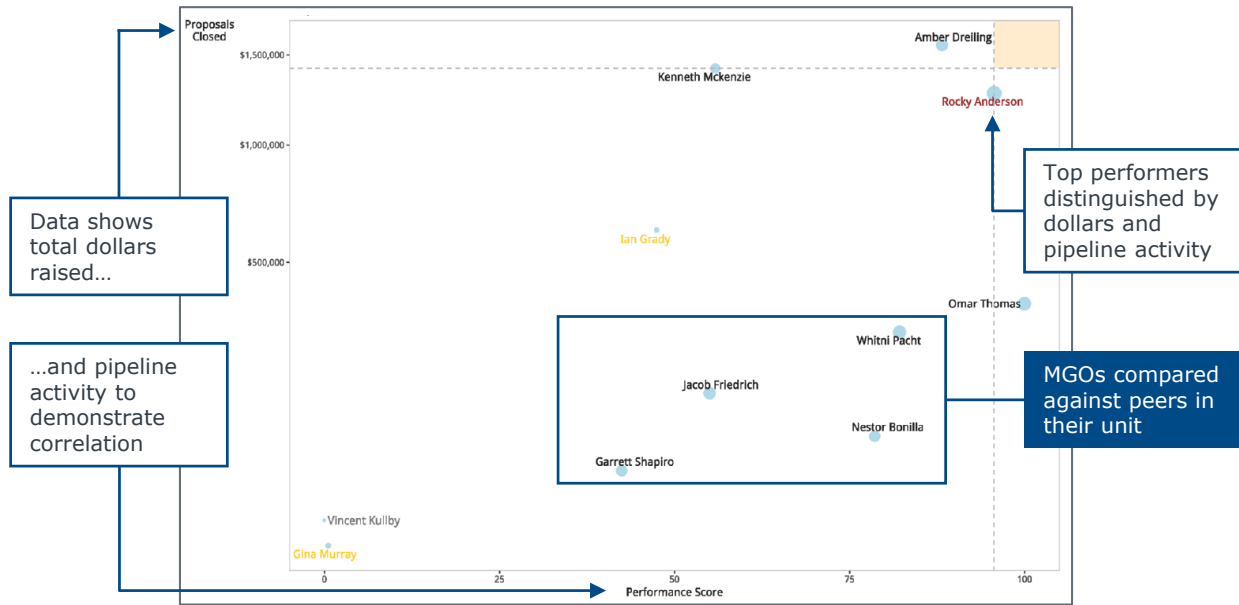
USC likewise overhauled their fundraiser metrics to hardwire cultivation next-steps. To ensure that MGOs were not only visiting their prospects but also developing cultivation strategies for them, USC began tracking and rewarding strategy formation and fundraiser-assigned capacity ratings.

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.

# Engineering Productive Competition

## Monthly Performance Email Drives MGO Activity

### USC Circulates MGO's Pipeline Activity Tracker for All in Unit to See



**19%** Three-month increase in number of **strategies logged** by MGOs<sup>1</sup>

**33%** Three-month increase in **fundraiser-assigned ratings**

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.

1) February 2017 to May 2017.

Source: Advancement Forum interviews and analysis.

# Practice 12: Plug-and-Play Cultivation Guide

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## 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

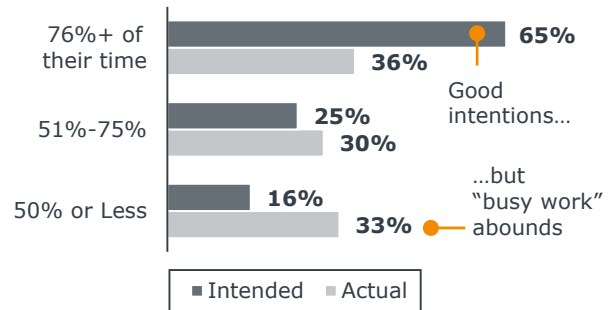
MGOs Reinvent the Wheel with Each New Strategy, Limiting Reach

## A Lot of Pre-Cultivation Work...



## ...And Less Time Than Ever to Do It

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



“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*

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.

Sources: Megli C, et al., “Optimizing Fundraiser Performance,” Bentz Whaley Flessner, Dec. 2014, <http://www.bwf.com/wp-content/uploads/2015/01/December2014.pdf>; Advancement Forum interviews and analysis.

# The One-Stop Cultivation Shop

Comprehensive Manual Makes Strategy Planning Easy

## Marquette University’s “Activate Your Prospects” Guide

21-page manual aggregates existing cultivation opportunities for MGOs to plug into



### Provides Fuel for Brainstorming

Overabundance of ideas minimizes strategy “writers block”



### Speeds Up MGO Onboarding

Improves knowledge of institutional opportunities



### Improves Triage Process

Departmental contacts listed for all opportunities



### Easy Access on the Go

Busy fundraisers can find prospect opportunities remotely

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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

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## 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

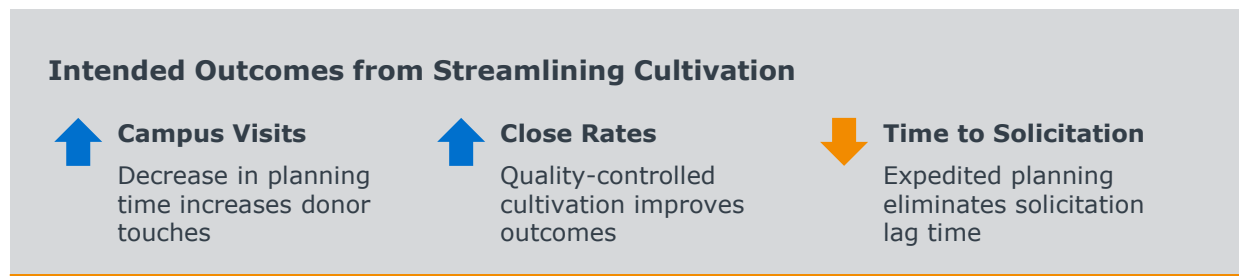
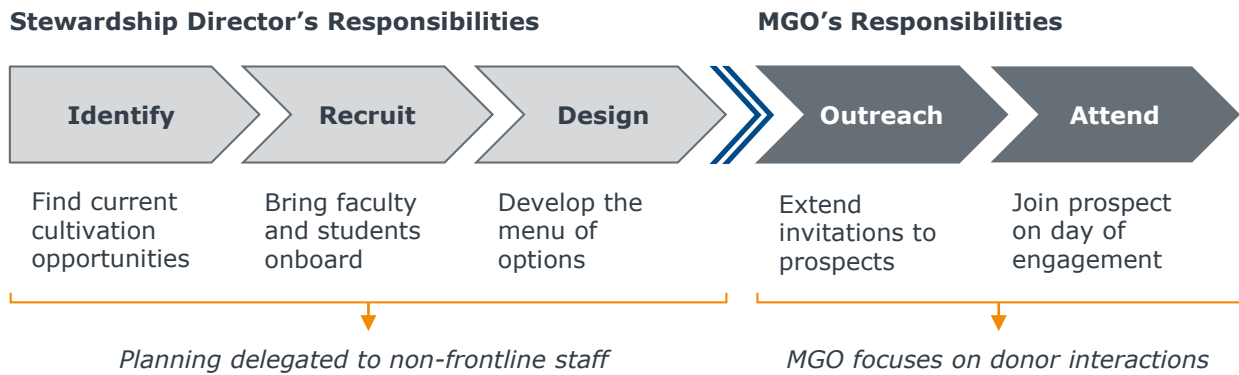
Bryant University

- Institutional control: Private
- Enrollment: 3,698 (3,462 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Large Suburb (Smithfield, RI)

# Comparative Advantage in Cultivation

## Stewardship Puts Pieces in Place That MGOs Tap for On-Demand Cultivation

### Bryant University's Division of Labor in Prospect Moves



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

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## 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

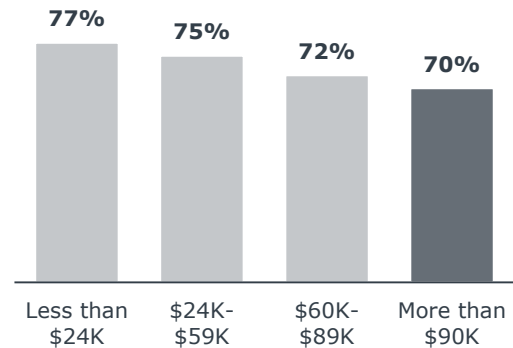
### Donors Busier Than Ever

“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*



### 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.

Sources: Rheault M, “In US 3 in 10 Working Adults Are Strapped for Time,” *Gallup*, July 2011, <http://www.gallup.com/poll/148583/working-adults-strapped-time.aspx>; Ruffalo Noel Levitz, “Advancement Leaders Speak 2017,” 2017; Advancement Forum interviews and analysis.

# What Gets Measured Gets Done

## Initiating the Shift to Emphasizing Prospect Interactions

### UC Santa Cruz Shifts Focus to Meaningful Interactions



#### In-Person Visits

- Coffee meetings
- Donor dinners
- Meetings with academic partners



**Advances Key Relationships**



#### "One-Way" Outreach

- Event invitations
- Follow-ups on university news
- Personal letters



**Increases Activity**



#### "Two-Way" Exchanges

- Skype meetings
- Phone calls
- Email conversations



**Ensures Quality**

### Rolling Out the New Model to MGOs

**1** Emphasize in manager check-ins

**2** Consider during evaluations

**3** *Next-Step:* Hardwire metrics

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 Equips 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



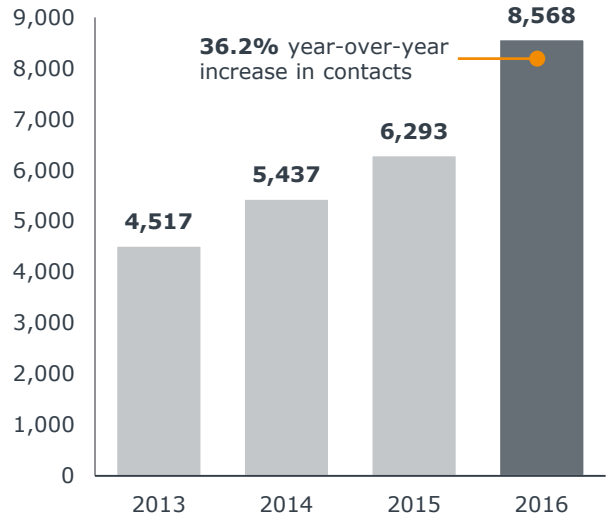
Invite **content experts** to address team



Encourage 2 hours/month at **talks, lectures, tours**

### A Big Uptick in Outreach

*Number of Contacts, 2013-2016*



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.

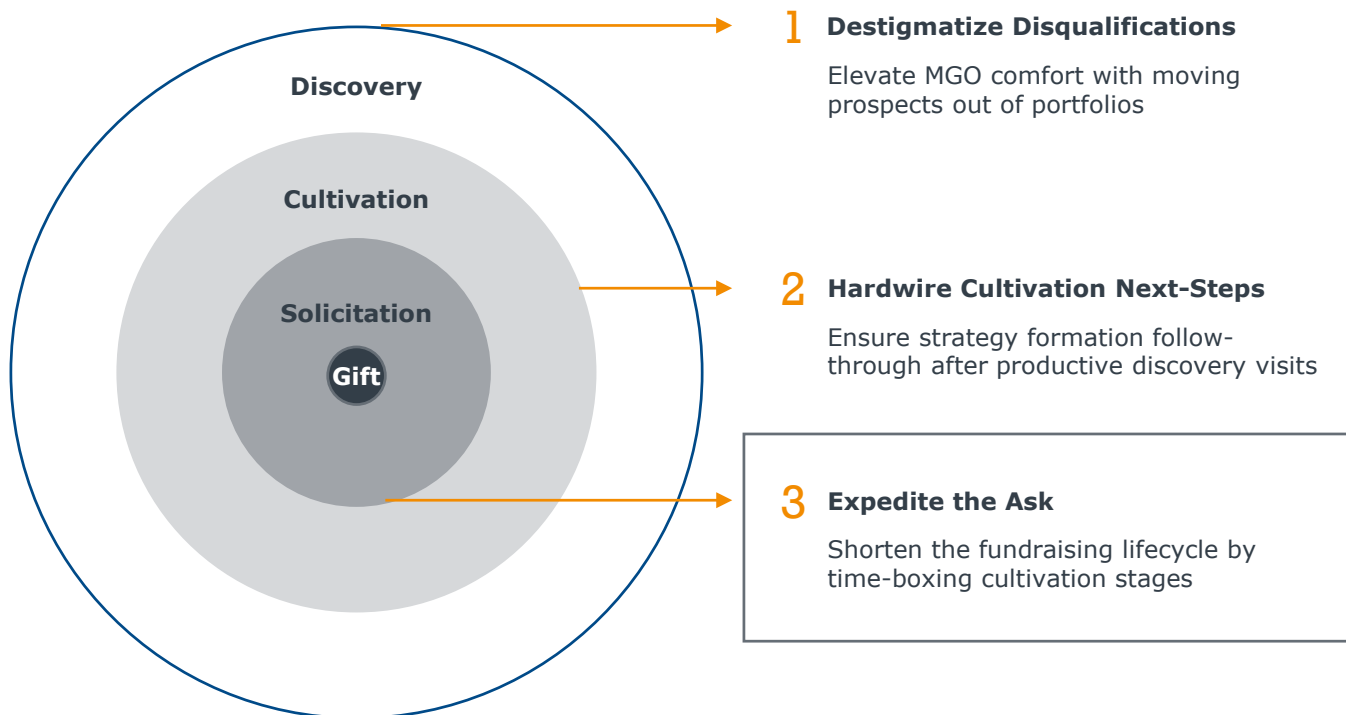
These efforts have led to a spike in outreach to prospects in recent years. Just between 2015 and 2016, the number of contact attempts jumped by 36.2%.

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.

# Accelerating Portfolio Churn

## Expediting Prospect Movement to Expand Pipeline Coverage

### Jane Q. Fundraiser's Portfolio



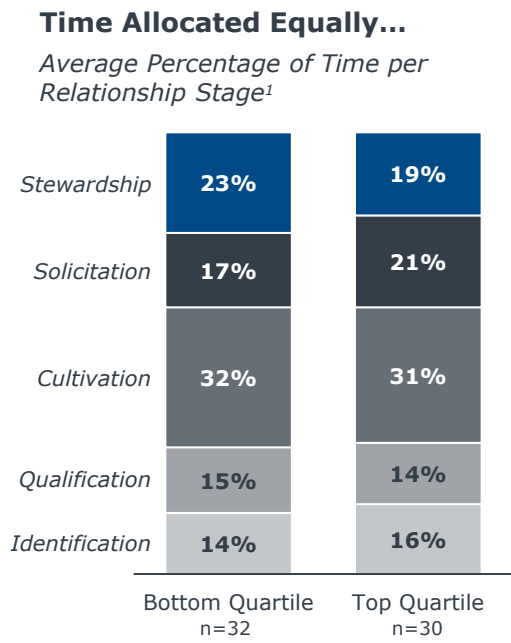
Increasing the rate of disqualification and meaningful cultivation touches moves prospects through the cultivation cycle. Yet many fundraisers feel hesitant about rushing the ask.

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.

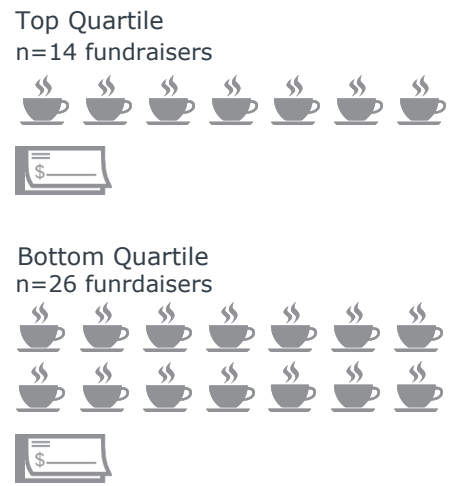
Doing so frees up fundraisers' capacity and allows for more high-potential unassigned prospects to be moved into portfolios.

# Too Long in Cultivation?

## Shorter Timelines and Fewer Moves Characterize Highest Performers



**...But Overall Shorter Time Frame**  
Average Number of Visits per Ask



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.

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

Sources: 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

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## Expedite the Ask

### Practice in Brief

Advancement leaders institute a division-wide 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

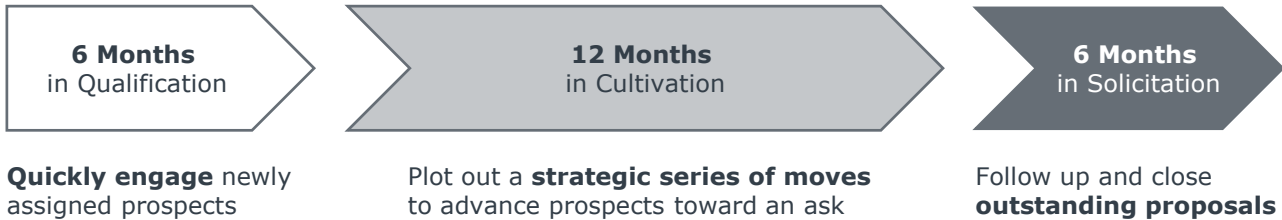
- Institutional control: Private
- Enrollment: 15,775 (6,001 undergraduate)
- Carnegie classification: Research University
- Campus setting: Large City (Chicago, IL)

# Hardwiring Fast-Paced Solicitations

## Speeding Up Cultivation Timeline to Drive Activity

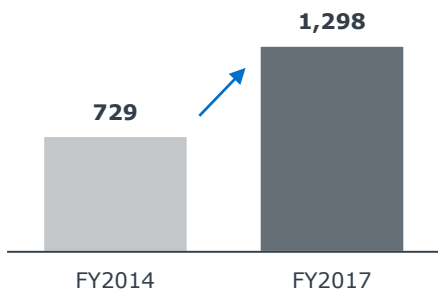
### University of Chicago Holds Firm on Timelines

*Accelerating Prospects to the Ask*

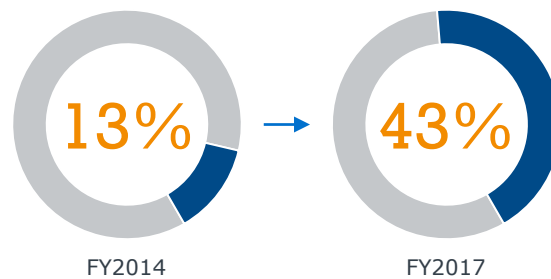


### Not Just Faster—More and Better Too

*Number of \$100K+ Asks*



*Percentage of Prospects Asked at Capacity*



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.



# Expedited Ask Strategy Shifts Sights to Pipeline

## Previously Unsolicited Prospects Attract New Attention

### Engaging the Overlooked Pipeline

*Prospects Currently Being Cultivated and Solicited*



#### **\$100K Prospects**

MGOs previously spent significant time with lower-level prospects



#### **High-Net-Worth Parents**

Shorter lead-up to major gifts makes them attractive prospects



#### **"Colder" Alumni and Friends**

Fundraisers aim beyond the donor pool already close to the University

### **Making the Most of Our Opportunities**

"We have a small alumni population in comparison to many of our fundraising peers. The way we look at it, we can't afford to ignore any opportunities. So our vice president said you have to **get in front of as many people as possible** and find out if they're willing to give."

*Kimberly Priebe, Senior Director, Prospect Management and Decision Support  
University of Chicago*

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

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## 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*

Gift Level	Number of Gifts Required	Number of Prospects Needed	Number of Prospects Rated
\$250,000,000	2	6	39
\$100,000,000	7	21	74
\$75,000,000	5	15	29
\$50,000,000	3	18	33
\$25,000,000	Too few major gift prospects	45	50
\$10,000,000		136	164
\$5,000,000	61	183	175
\$2,500,000	195	585	185
\$1,000,000	1,000	4,000	1,458
\$500,000	1,109	4,436	2,534
\$250,000	1,490	5,960	8,789
\$100,000	1,800	7,200	34,157
\$50,000	2,750	11,000	5,804
\$25,000	4,500	18,000	232,703
<b>Subtotal</b>	<b>12,975</b>	<b>51,605</b>	<b>286,194</b>
Up to \$25,000	Many	Many	127,850
<b>Campaign Total</b>	<b>12,975</b>	<b>51,605</b>	<b>414,044</b>

Too few major gift prospects

Plenty of prospects here, but **too little time** for broad discovery

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

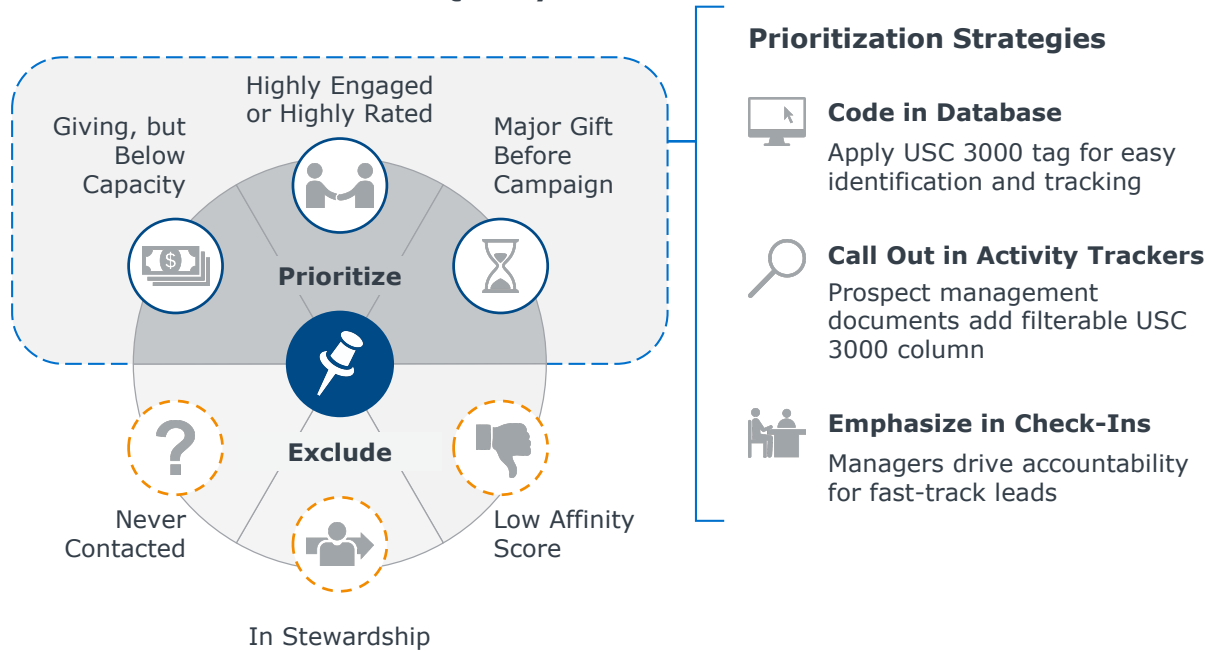
As USC approached the original end date of their campaign, a prospect-pyramid analysis revealed too few prospects at major gift levels to bring the university to its goal.

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

# USC 3000 Initiative

## Flagging the Best Prospects for Short-Term Cultivation

### A Focus on Those Who Will Give Quickly



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.

# Prioritization Guide

## Speeding Implementation and Ensuring Follow-Through

### 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.

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

# Prioritization Guide (cont.)

## Speeding Implementation and Ensuring Follow-Through

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

# Prioritization Guide (cont.)

## Speeding Implementation and Ensuring Follow-Through

Tactic	My Institution Should Prioritize This Tactic	Notes and Next-Steps
<p><b>Time-Boxed Cultivation Stages</b>  <i>University of Chicago</i>                      Institution-wide timeline for cultivation encourages MGOs to accelerate prospects to the ask within 18 months of assignment.</p>	<p>1 2 3 4 5  <i>Disagree</i> <i>Agree</i></p>	
<p><b>Fast-Track Prospect Gap Analysis</b>  <i>University of Southern California</i>                      Prospects are selected and prioritized for cultivation based on the likelihood that they will give to capacity before the end of the campaign.</p>	<p>1 2 3 4 5</p>	







# Scaling Personalized Cultivation

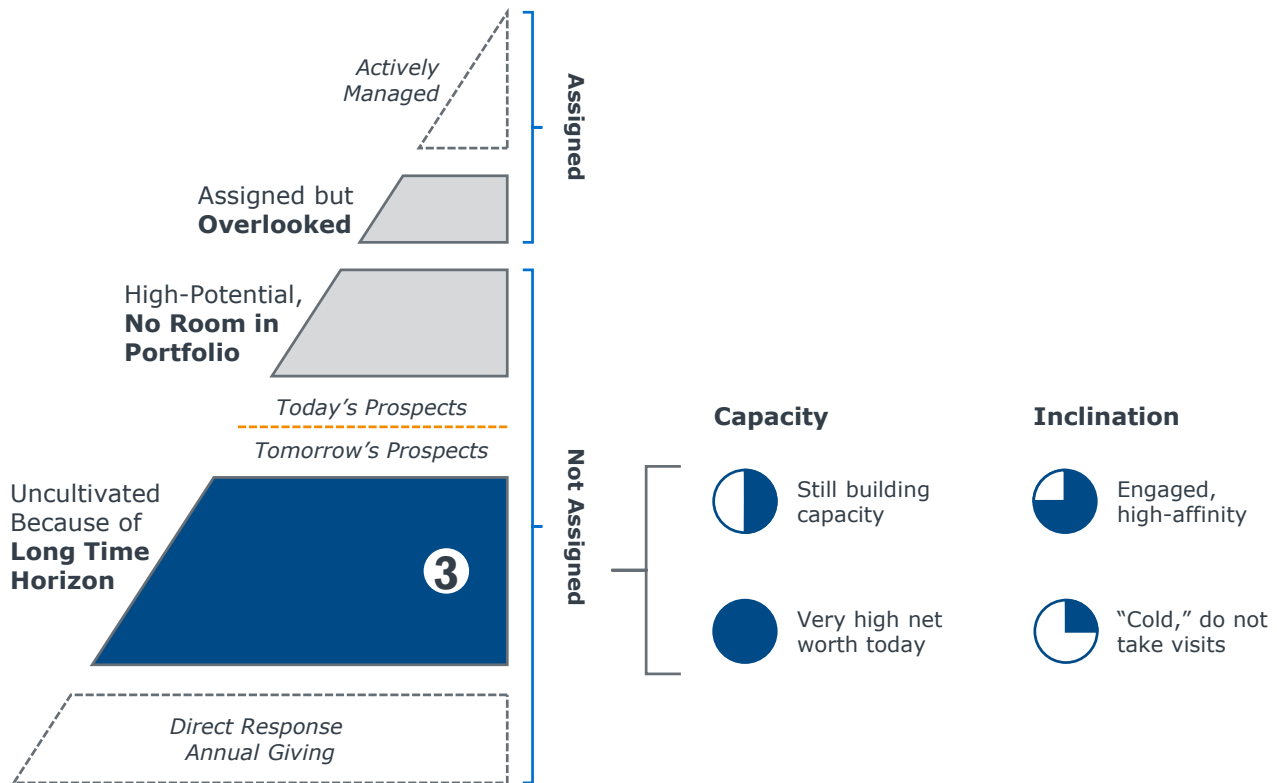
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SECTION

4

# 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.

# Tomorrow's Prospects Beyond Our Reach

## Significant Constraints Hamper Full-Pipeline Cultivation

### "Why Aren't We Cultivating the Pipeline?"



#### Prospects Still Developing Capacity

“We should stay in touch, but we can't focus our MGOs on **low-level prospects.**”



#### Prospects Are Not Warm

“We've tried reaching out, and we get nothing. They're just **not willing to take a visit** with an MGO.”



#### Not Enough Fundraisers

“We operate in an **environment of scarcity.** Our MGOs can only do so much. But that can mean they ignore the pipeline.”

#### 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<sup>1</sup>

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.

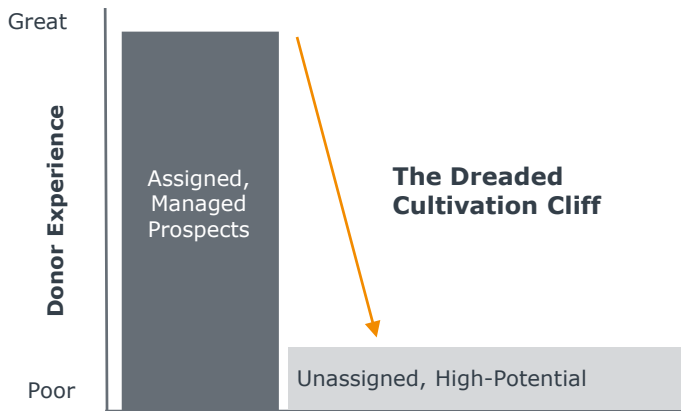
Sources: Reeher, "Managing Officer Activity: An Executive Discipline for Driving Gift Officer Productivity" <http://info.reeher.com/rs/reeherllc/images/ReeherWhitePaperManagingOfficerActivities.pdf>; VSE Corporation, Alexandria, VA; Bentz Whaley Flessner, Dec. 2014, <http://www.bwf.com/wp-content/uploads/2015/01/December2014.pdf>; EAB Advancement Investment and Performance Initiative, 2014-2016; Advancement Forum interviews and analysis.

1) Based on 76,410 average alumni of record.

# Softening the Cultivation Cliff

Many Institutions Struggle with 'Next Layer' of Unmanaged Prospects

## Without Active Management, a Steep Quality Decline



✘ Unmanaged prospects get **one-size-fits-all** cultivation

## Looking for Cultivation at Scale

“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*

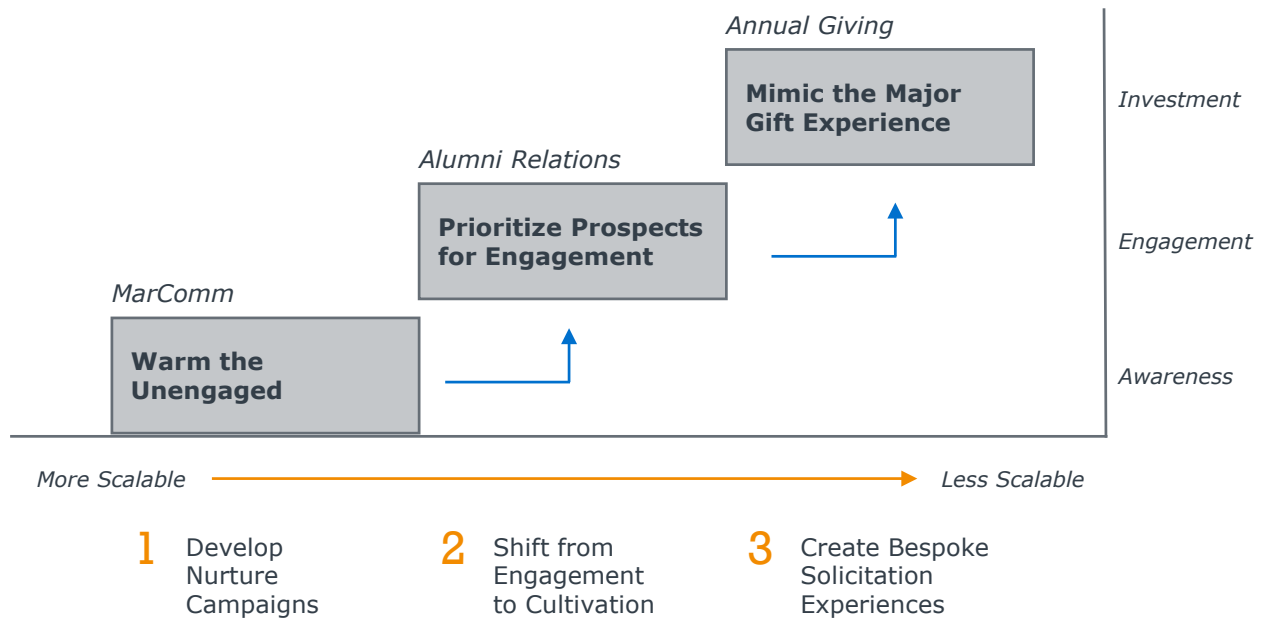
Yet advancement leaders cannot allow tomorrow’s prospects to fall into the same one-size-fits-all mass-marketing segments as all other alumni and prospects. Typical university communications, engagement programming, and annual giving appeals do not do enough to meaningfully cultivate these individuals.

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.

# 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

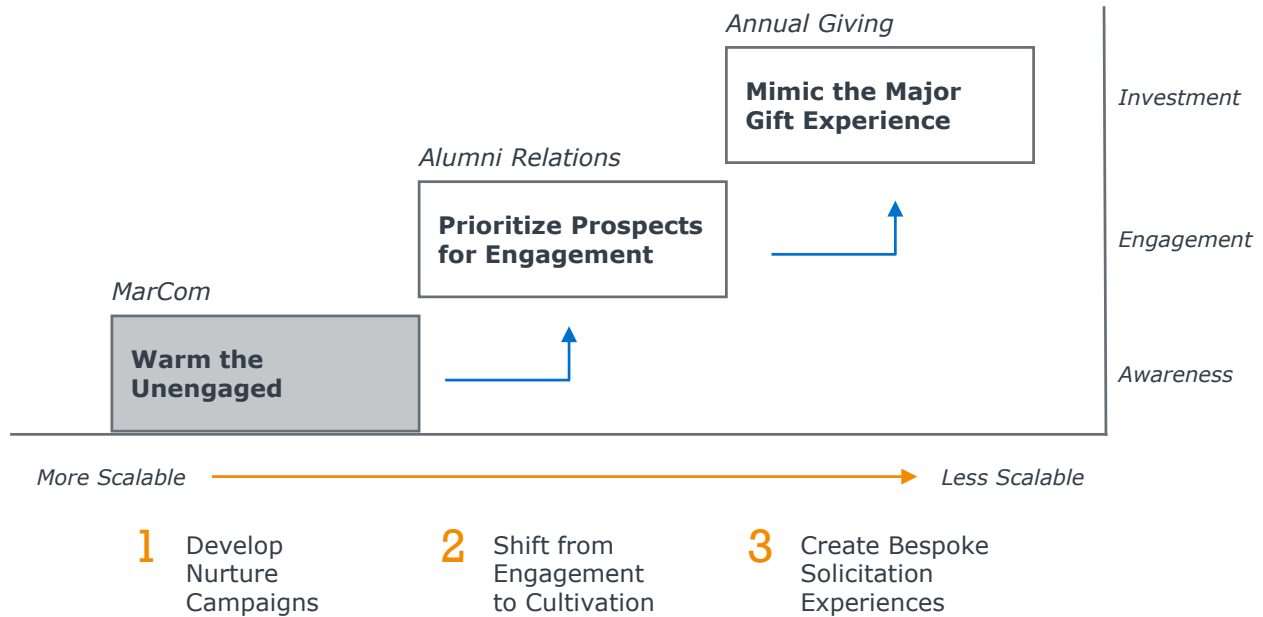


Scaling personalized cultivation requires all areas of the advancement enterprise to collaborate. Communications professionals, alumni relations staff, and annual giving teams all have a role to play in engaging tomorrow's best prospects and warming them to the idea of an investment in the institution.

# 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



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



### 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*

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.

# Practice 17: High-Touch Prospect Communications

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## 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)



# Nurturing Leads Through MarCom




## Specialized Messaging Will Target 10,000 Prospects in Qualification

### McGill University Segments Discovery Prospects

- 1 Identify**  
Maintain list of 10,000 prospects in qualification
- 2 Target**  
Segment out from general communications pool
- 3 Manage**  
Assess behaviors and customize communications



### Segmented Emails Reach Pre-Qualification Prospects

-  **Track Prospect Micro-Behaviors**  
Monitor and analyze click-throughs, open rates, time on page, and more for prospects in qualification
- 
-  **Customize Scripting**  
Tailor mass communications to qualification prospects based on lessons learned from micro-behavior tracking

### Communicating Now to Cultivate Later

“ We knew we needed to communicate differently to our high-potential prospects—the ones who fundraisers weren’t reaching. We had to make that audience feel special **so when our fundraisers do reach out, they decide to engage with us.**”

*Paul Chesser, Assistant Vice-Principal, Development  
McGill University*

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

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## 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.*

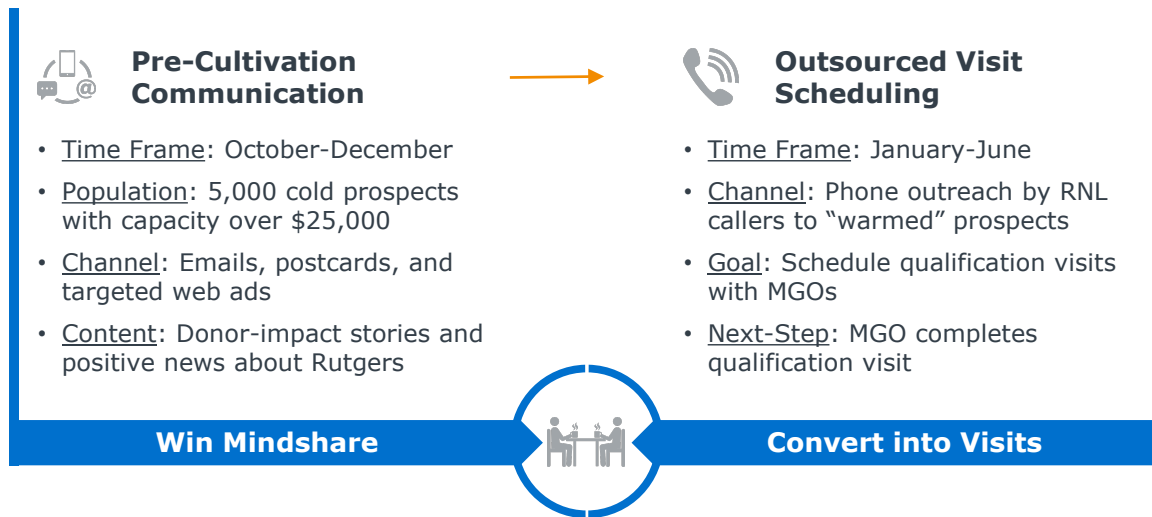
### Institution Profiled

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



### Strategic Goals of Prospect-Warming Initiative



#### Increase Visits

Meet with previously unresponsive high-net-worth prospects



#### Boost Qualifications

Move more prospects into major-gift cultivation



#### Close Gifts

Bring in donations from new pipeline prospects

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.

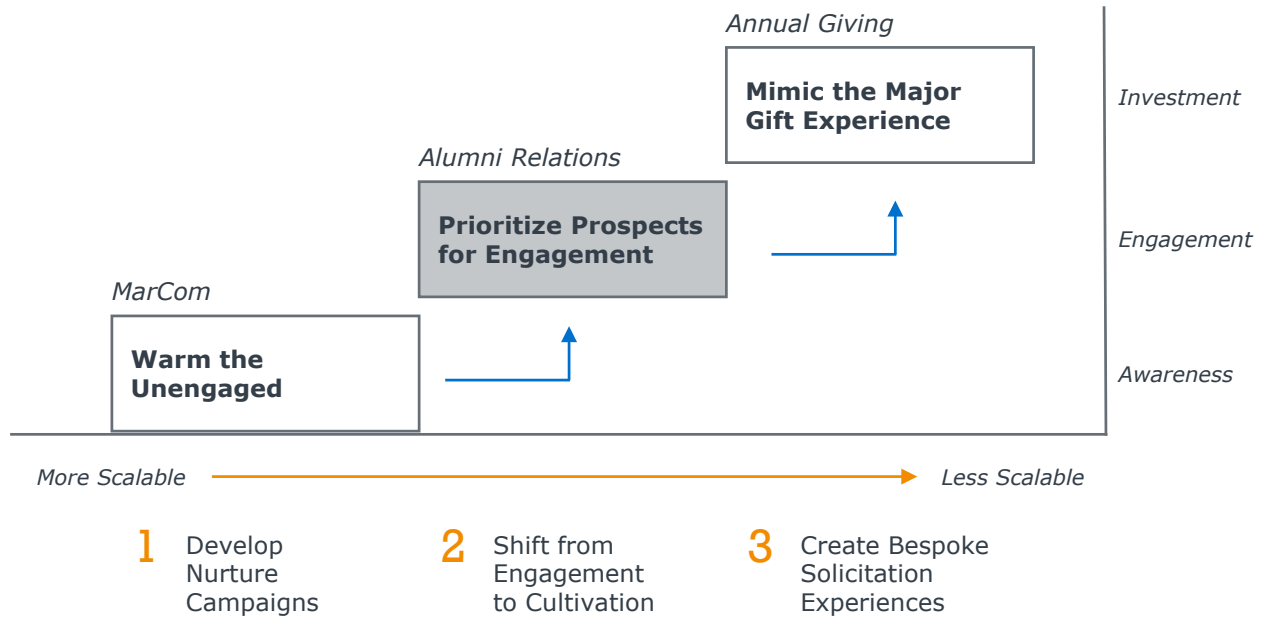
The advancement team at Rutgers targeted 5,000 cold, unresponsive prospects with engagement communications for a three-month period. These multichannel communications won mindshare among the prospects and underscored a feeling of connection to the university.

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.

# 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



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.

# 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)

# Looking to Alumni Relations for Cultivation

## Engagement Professionals Set to Take On Prospect Management

### From Broad-Based Programming...

*Alumni Relations 1.0*



#### Start with the Program

Repeat traditional slate of programming; emphasize events



#### Assess Inputs, Outputs

Track attendance and satisfaction; alumni's next action not tracked



#### Serve All Equally

Design for everyone; attract mostly young or reunion alumni



### ...To Targeted Prospect Engagement

*Alumni Relations 2.0*



#### Start with the Alumnus/a

Determine group's needs and design strategies to meet them



#### Assess Outcomes, ROI

Evaluate staff efforts by how they impact giving and future engagement



#### Target Priority Alumni

Direct staff resources to alumni who can make the biggest impact

### A Strategic Partner to Development



**65%**

Of alumni relations units are **integrated with development** or are working to integrate

**56%**

**Larger budget** for alumni relations at institutions that have an integrated model

**48%**

Of alumni relations units now **use ROI** as a key performance indicator

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

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## 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

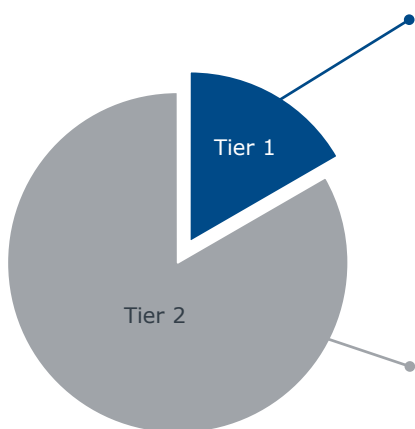
- Institutional control: Private
- Enrollment: 6,739 (6,008 undergraduate)
- Carnegie classification: Master's university
- Campus setting: Midsize Suburb (Elon, NC)



# Bringing Prospect Portfolios to Alumni Relations

## Alumni Engagement Officers Build Relationships with Rising Stars

### Engagement Portfolios at Elon University



150

#### Top Priorities

- Family wealth
- Top volunteers
- Rapid upgrades

### Engagement Strategy

#### Personalized, First-to-Know Marketing

- Prioritized for in-person visits
- Personalized messages via phone, text, email, LinkedIn
- First to know about upcoming events, breaking news

1,000

#### Pipeline Prospects

- Developing capacity
- Gift potential unclear

#### High-Touch, Scalable Techniques

- Personalized outreach tactics (e.g., mail merge)
- Messages delivered primarily via phone and email

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.

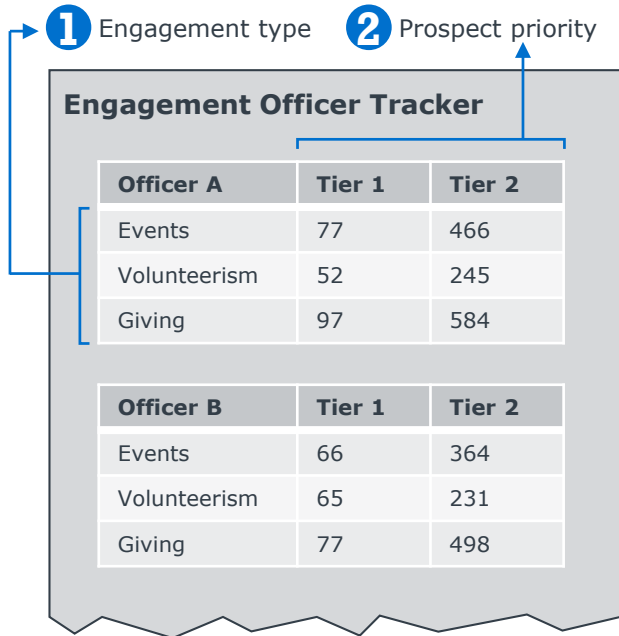
Elon hired three alumni engagement officers to each carry a portfolio of 1,150 engagement prospects, with 150 of those prospects being designated as top priorities.

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

# Measuring Engagement Outcomes

## Officer Goals Focus on Priority Alumni and Track Key Behaviors

### Outcomes Tracker for Assigned Alumni

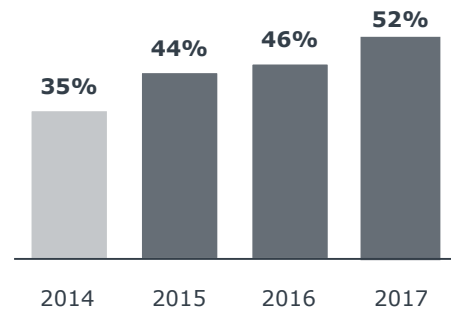


### Managed Prospects Advance Through the Pipeline

**41%** Of managed alumni attend events

**24%** Of managed alumni volunteer (and 36% of Tier 1 alumni do so)

### Assigned Prospect Giving Rate



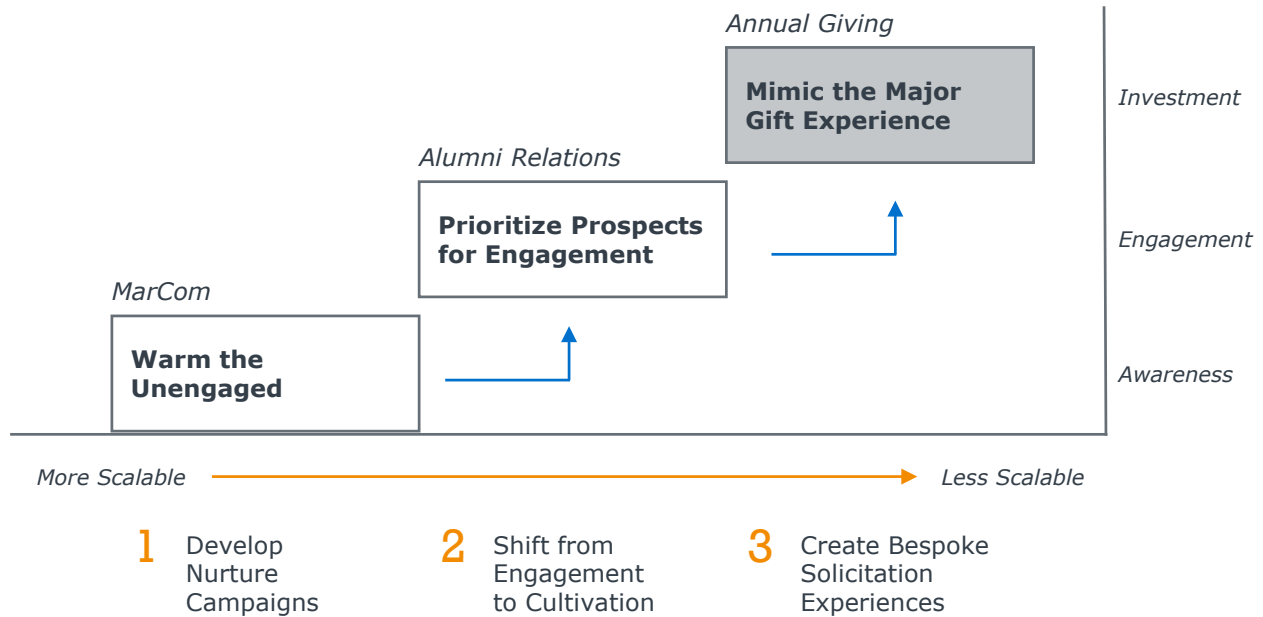
The alumni engagement officers are evaluated based on how effectively they inspire their assigned alumni to come to events, volunteer, and give.

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.

# 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



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.

# Annual Giving Shifts Sights to the Pipeline

## Advancement Leaders Seek Dual Participation/Pipeline Strategy

### Annual Giving c. 2013



“My board keeps asking about our participation rate. It falls every year—a lot of that has to do with young alumni and how hard it is acquiring them.

**“What can I do to boost the participation rate?”**

### Annual Giving c. 2018

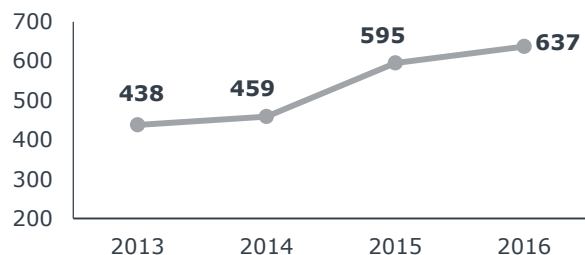


“We’ve started to ‘right the ship’ with participation, but now I’m worried about retention and upgrades. Are these one-time donors, or lifelong supporters?”

**“What can I do to advance these donors through the pipeline?”**

### The Usual Playbook: Leadership Annual Giving Officers

*Growth in Leadership Annual Giving Officer Job Postings, 2013-2016*



**45%**

Growth since 2013 in leadership annual giving officer **job postings**

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.

# Practice 21: Major Gifts Lite Proposals

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## 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

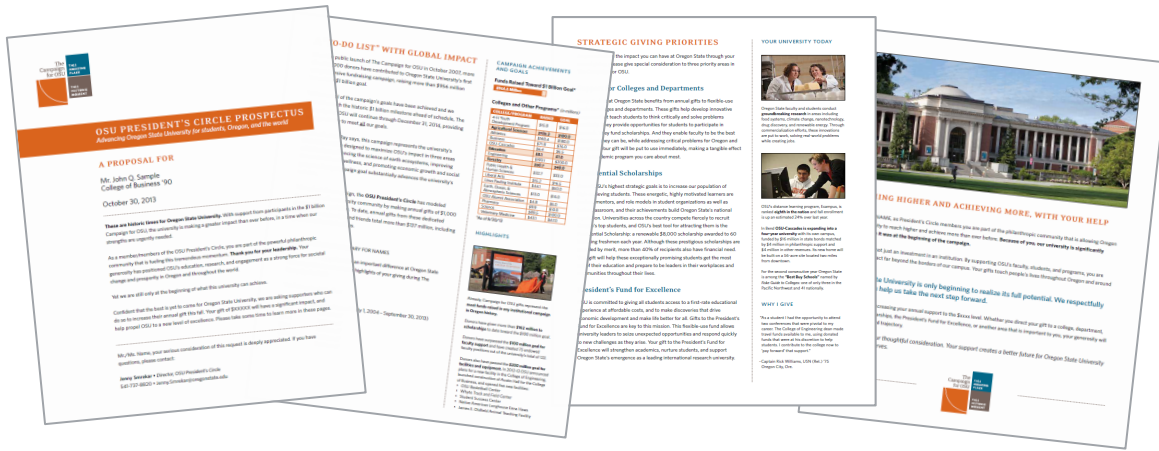
Oregon State University

- Institutional control: Public
- Enrollment: 30,354 (25,327 undergraduate)
- Carnegie classification: Research University
- Campus setting: Small City (Corvallis, OR)

# Using Direct Mail to Advance the Pipeline

The Major Gift Proposal Experience—at Scale

## Oregon State University's Major-Gifts-Lite Appeal



**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

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.

Source: Advancement Forum interviews and analysis.

# A Solicitation Force-Multiplier

## Improving Solicitation Quality for High-Potential Prospect Segments

### Targeted Prospect Populations



#### Highly Rated Non-Donors

Uncultivated major gift prospects

*Purpose: Generate first gifts to begin major gift cultivation*



#### Established President's Circle Donors

Mid-level supporters who consistently give \$2,500+

*Purpose: Continue movement toward major gifts*



#### Entry-Level President's Circle Donors

Individuals whose giving hovers around \$1,000

*Purpose: Solidify donors' commitment to the university*

### The Initiative's Reach



906

Mailings sent in 2013

847

Mailings sent in 2014

\$4.44

Cost per mailing

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)

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

Strong response rate from **priority donor segments**

Upgrades and new gifts from previous non-donors **yield big returns**

**High ROI** from major-gifts-lite direct-mail appeals

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.

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

Source: Advancement Forum interviews and analysis.



# Practice 22: Social Media Solicitation Testing

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## 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

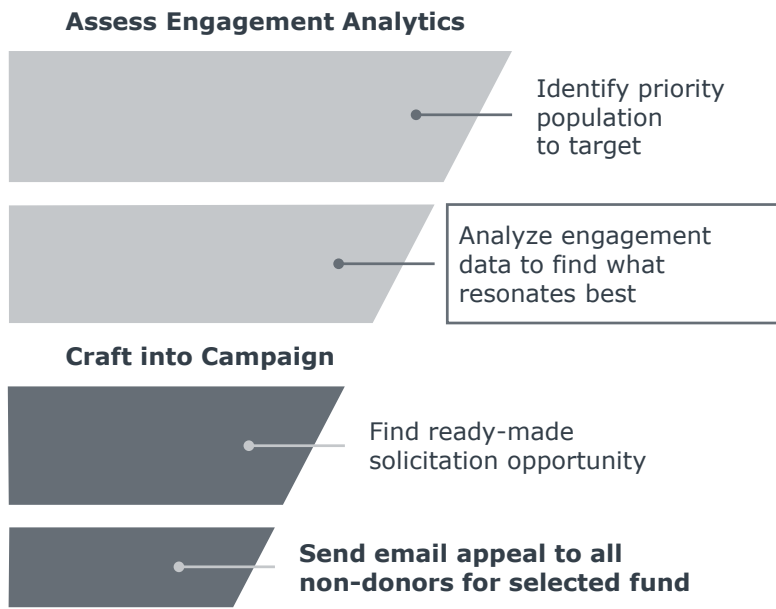
Massachusetts Institute of Technology

- Institutional control: Private
- Enrollment: 11,376 (4,524 undergraduate)
- Carnegie classification: Research University
- Campus setting: Midsize City (Cambridge, MA)

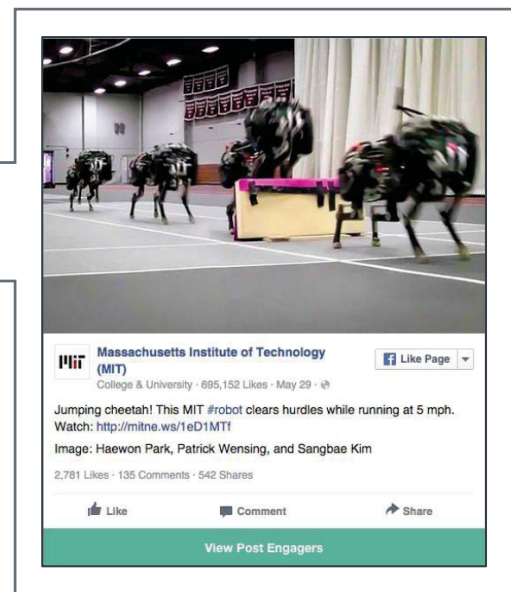
# Tailoring Appeals to Top Prospects' Interests

## Facebook Data Helps Identify Highest-Potential Solicitation Theme

### MIT's Strategic Solicitation Development Process



### Robotics Facebook Post Overperforms



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.

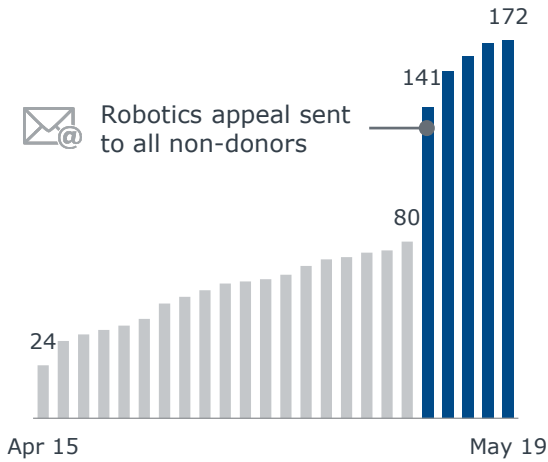
They found that a story about a student robotics group generated intense enthusiasm among alumni non-donors. They followed up on this piece by soliciting all non-donors for a gift to the robotics group's crowdfunding campaign.

# Robotics Solicitation Strikes a Chord

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

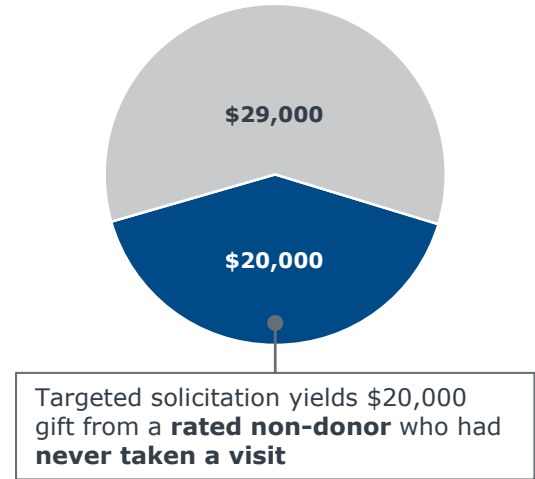
### MIT Email Appeal Nearly Doubles Donors...

Total Robotics Campaign Donors,  
April-May 2015



### ...And Surfaces Leadership Gift from Non-Donor

Total Robotics Campaign Dollars



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.

# 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.

# Driving Pipeline Growth from a Desk Chair

## Digital Gift Officers Bring Many Benefits, Not Least of Which Is Big Revenue

### Benefits of Cornell University's Digital Gift Officer Program



#### Cost Savings

Lack of travel costs limit fundraising overhead



#### Greater Geographic Reach

Individuals in prospect-sparse regions receive cultivation



#### Professional Growth Opportunity

Position acts as springboard to other fundraising roles



#### Alignment with Prospect Preferences

Younger prospects do not always want a sit-down meeting with a fundraiser



#### Quick Qualification

A \$5,000 phone gift is a great indication of further philanthropic potential

### Outsized Revenue Returns

**\$700K**

Raised on average by each digital gift officer annually

**\$400K**

Gift surfaced by digital gift officer



Growth in number of \$5K-\$25K gifts

“Our digital gift officers consistently bring in amounts **comparable to our traveling officers.**”

*Joe Lyons  
Executive Director, Leadership Gifts,  
Communications and Donor Engagement  
Cornell University*

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.

# Prioritization Guide

## Speeding Implementation and Ensuring Follow-Through

### 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.

Tactic	My Institution Should Prioritize This Tactic	Notes and Next-Steps
<p><b>High-Touch Prospect Communications</b> <i>McGill University</i></p> <p>Marketing/communications segments high-potential unassigned prospects for customized messaging and engagement-outcome tracking.</p>	<p>1 2 3 4 5</p> <p><i>Disagree</i> <i>Agree</i></p>	
<p><b>Prospect "Warming" Campaigns</b> <i>Rutgers University</i></p> <p>Targeted engagement communications nurture leads and warm prospects prior to visit-scheduling attempts.</p>	<p>1 2 3 4 5</p>	
<p><b>Pipeline-Focused Alumni Programming</b> <i>DePaul University, University of Michigan, Marquette University</i></p> <p>Special-interest engagement events target high-potential alumni segments and ensure that alumni relations programming yields high ROI.</p>	<p>1 2 3 4 5</p>	
<p><b>Alumni Engagement Portfolios</b> <i>Elon University</i></p> <p>Alumni relations staff members are assigned portfolios of alumni to engage. Portfolios are segmented by long-term major-gift potential to prioritize outreach efforts.</p>	<p>1 2 3 4 5</p>	

# Prioritization Guide (cont.)

## Speeding Implementation and Ensuring Follow-Through

Tactic	My Institution Should Prioritize This Tactic	Notes and Next-Steps
<p><b>Major-Gifts-Lite Proposals</b>  <i>Oregon State University</i>                      Four-page color-printed personalized prospectuses outline the case for giving and solicit mid-level gifts from unmanaged prospects.</p>	<p>1 2 3 4 5  <i>Disagree Agree</i></p>	
<p><b>Social Media Solicitation Testing</b>  <i>Massachusetts Institute of Technology</i>                      Advancement staff analyzed engagement data to determine what resonates with population and sent solicitations for a similarly themed fund.</p>	<p>1 2 3 4 5</p>	
<p><b>Digital Gift Officers</b>  <i>Davidson College, Cornell University</i>                      Gift officers cultivate and solicit prospects for leadership annual gifts through a multichannel remote strategy (phone, email, social media, videoconferencing, etc.).</p>	<p>1 2 3 4 5</p>	





# Implementation Resource Center

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SECTION

5

# Alumni Relations Prospect Referral Form

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

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

## Engagement Referrals to Research

### Wealth Indicators

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

### Ratings 101

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

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

#### Capacity Ratings

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

#### Supplemental Ratings

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

### Referral Process

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

# Dedicated Discovery Scheduler Job Description

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

## Constituent Engagement Specialist

### Position Summary

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

### Major Responsibilities

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

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

# Dedicated Discovery Scheduler Job Description (cont.)

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

## **Education Requirements**

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

## **Required Skills and/or Experience**

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

# Pipeline Metrics Picklist

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

## Fundraiser Pipeline Metrics

### Metrics (Choose no more than three)

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

### Goals

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

*Metric 1*

\_\_\_\_\_

*Baseline Goal for Metric 1*

*Metric 2*

\_\_\_\_\_

*Baseline Goal for Metric 2*

*Metric 3*

\_\_\_\_\_

*Baseline Goal for Metric 3*



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

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*How Often Does This Opportunity Occur?*

---

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

---

*Description*

---

---

*Cultivation Opportunity Name*

---

*Point Person Name*

---

*Point Person Phone Number*

---

*Point Person Email Address*

---

*How Often Does This Opportunity Occur?*

---

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

---

*Description*

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

---

*Cultivation Opportunity Name*

---

*Point Person Name*

---

*Point Person Phone Number*

---

*Point Person Email Address*

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*How Often Does This Opportunity Occur?*

---

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

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*Description*

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*Point Person Name*

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

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---

*Description*

---

*Cultivation Opportunity Name*

---

*Point Person Name*

---

*Point Person Phone Number*                      *Point Person Email Address*

---

*How Often Does This Opportunity Occur?*

---

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

---

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---

*Description*

# Digital Gift Officer Job Description

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

## Digital Gift Officer

### Position Summary

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

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

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

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

### Major Responsibilities

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

# Digital Gift Officer Job Description (cont.)

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## **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.











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