Roundtables

Communicating with Gift Officers (a gift officer from WSU Spokane sat in – she is the Director of Development for the College of Nursing)

Most important thing to FLFs? Clean data. Most important thing for PD to remember? Directors of Development are busy, so make it easier for them. Helping them plan out their activity for the fiscal year is super helpful (aka, a Top 25)

The portfolio report at WSU is sorted by ID number ☹☹☹ -- it’s not so easy for her to use.

New leads: a couple of new hot prospects every two weeks is perfect cadence for her. What’s important when communicating new leads?

Most important to her: consecutive years giving; are kids out of college?; job title; are they married to an MD?

Less important to her: capacity rating

At the Hutch, 3 attempted calls with no traction move a prospect back into the overall pool where the FLF cannot contact them ☹☹☹

Standard around table is ~20 discovery calls/emails to get one visit (not necessarily 20 attempts to the same person)

World Vision has a “warming pool” – subset of overall prospect pool. Their middle donor reps have portfolios of 1200 prospects. They hold roundtables to share new leads.

Managing ambiguous expectations

When faced with a big ambiguous project, mockups with fake data can get you a long way toward clarity before you put in a ton of time on something super fancy that wasn’t at all what the person had in mind.

Always try to iterate and get feedback rather than do a ton of work in silence.

Get comfortable with the MVP – minimum viable product. When that’s ready, show it.

Great phrasing for unreasonable requests: “I can’t do that in the time frame you proposed, but here’s what I CAN do”

Having peers watch each other work for an hour or two is a great way to identify opportunities for efficiency.

World Vision has a type of rating called “15 minutes only” to signal to FLFs exactly how quick they mean, and signal to researchers a very clear time limit.

Research Resources

A discussion about free and paid resources, what information can be found in the various resources listed and how ‘good’ the resources really are.

A lot of sharing of tips and tricks for finding what you want within the different resources and a reminder that ApraNW members and Prospect L are good places to ask questions.

Prospect Management Best Practices

Finding balance between research and prospect management when your role does both

What to do when DO’s are hoarding prospects and not disqualifying them

Attached UW disqualification documents

How do you get DO’s to qualify prospects?

What is our role to encourage them to do this?

How do you get a supervisor to care about the pipeline?

How do you get buy-in on separating PM and Research?

Rules for what is appropriate and inappropriate to put in a contact report

Different databases and what they can do

Metrics and setting goals

See UW Metrics grid and Top 25 process notes