BWF Client Partner Series

Bond Lammey and Amy Lampi

- Welcome! We are glad you have joined us.
- Use the Q&A Feature to ask questions.
- Any unanswered questions will be addressed individually after the webinar.
- Share your thoughts with us by using **#bwfwebinar.**
- For technical challenges, support is available by emailing bwf@bwf.com.

Upcoming Webinars

All webinars are at 2pm EST/1pm CST.

- **Wednesday, April 15**
  Strategic Donor Engagement in the Short-term For Long-term Success
  Hosted by Betsy Rigby and Shawn Vogen

Managing your Prospect Pipeline: Strategies During Times of Disruption

Bond Lammey and Amy Lampi

Agenda

1. Take Inventory
2. Segmentation and External Response
3. Internal Processes

Take Inventory

Relationship Management's Role in Building a Culture of Philanthropy

Relationship Management: An organization-wide strategy for building, advancing, and managing relationships and activities with organizational constituents.

Relationship management efforts should focus on:

- Prospects
- Donors
- Engaged Volunteers

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Creating a Culture of Philanthropy

- Times of disruption
- Break down silos
- Steward your colleagues
- Give back: Volunteer projects
- Employee Giving Campaigns (with sensitivity)
- Your work with donors and how they can help
- Sharing and celebrating of success stories across the organization
- Leadership goal for the organization

How can relationship management help us now?

- Drives Collaboration
- Creates Order/Structure
- Projects and Predicts Outcomes

Definitions

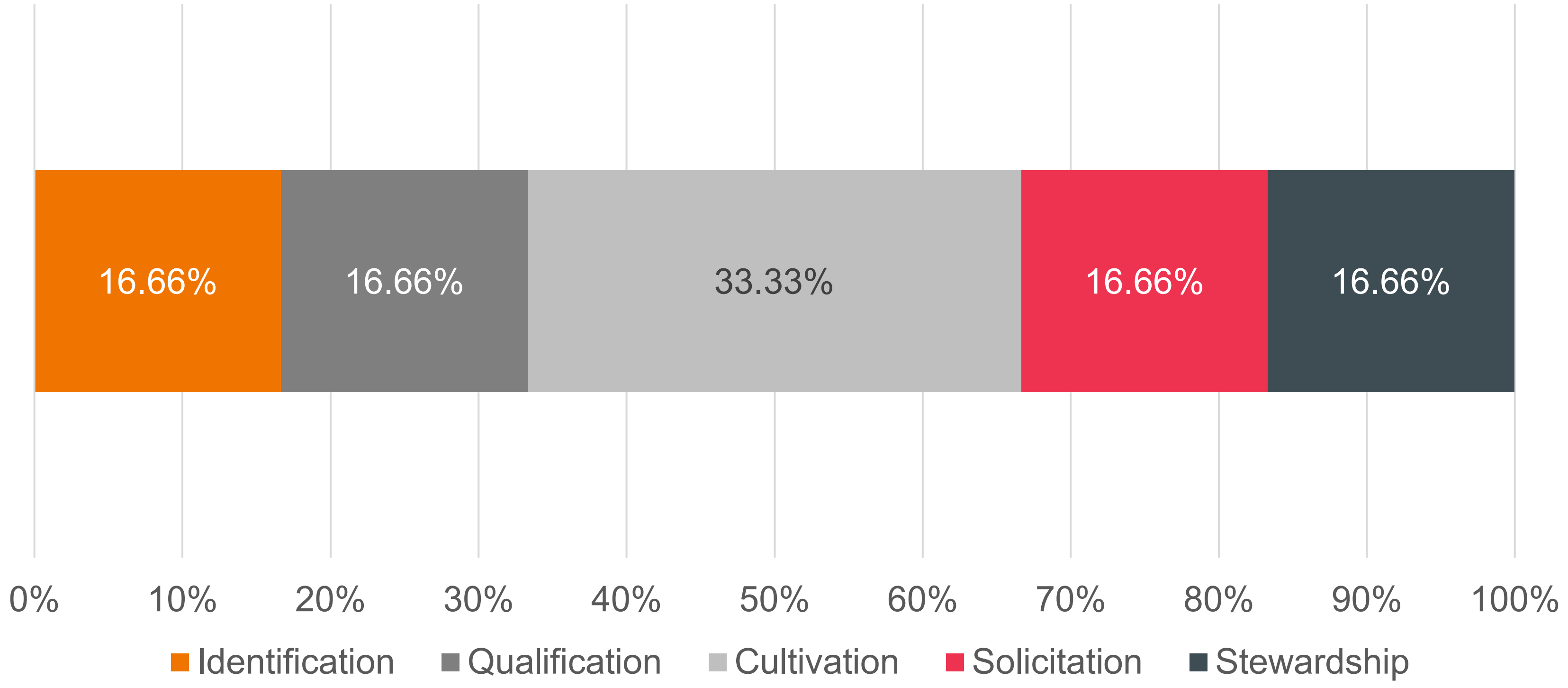
- **Pipeline.** The movement of prospects through all prospect stages (identification, qualification, cultivation, solicitation, stewardship).
- **Portfolio.** A group of prospects who are all assigned to the same fundraiser.
- **Prospect strategy.** A comprehensive strategy that considers multiple interests and all forms of giving to maximize the prospect's engagement with your organization.

Segmentation and External Response

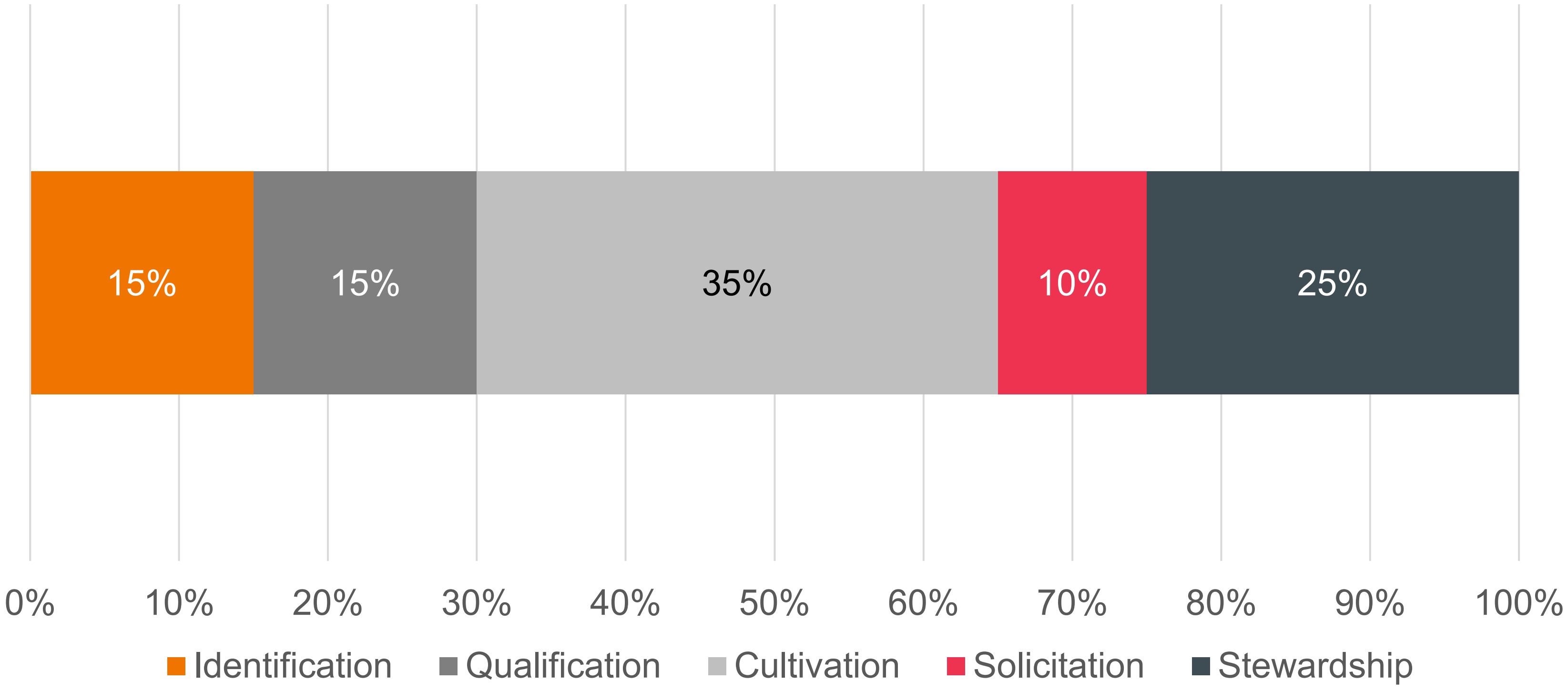
Consider Portfolio Sizes

Fundraising Responsibility Percentage	Portfolio Size (# of Prospects)
20%–30%	10–25
30%–40%	25–35
40%–50%	35–45
50%–60%	45–60
60%–70%	60–75
70%–80%	75–90
80%–90%	90–105
90%–100%	105–120

Portfolio Composition—Pre-Pandemic



Portfolio Composition—Post-Pandemic



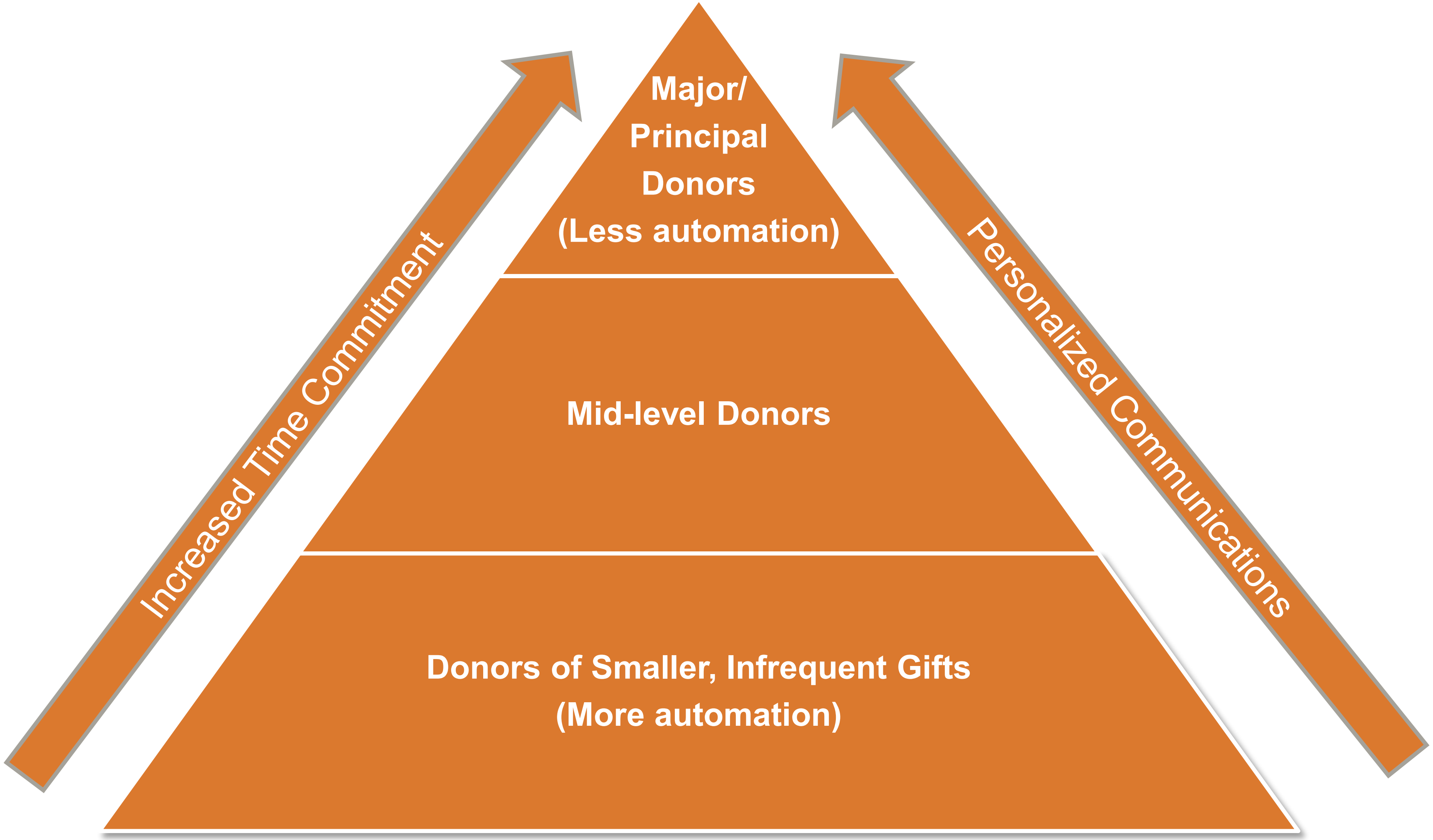
Donor Cycle Stages

Stage	Goal	Time in Stage	% of Portfolio	Next Step	Direct Mail?
Identification	Determine Interest and Capacity	1–3 months	15%	Qualify, Disqualify, or Return to Pool	Yes
Qualification	Secure F2F Visit	3–6 months	15%	Disqualify, Return to Pool, or Cultivate	Yes
Cultivation	Determine Interest Area	9–12 months	35%	Disqualify, Return to Pool, or Solicit	Yes
Solicitation	Ask for Major Gift	3–6 months	10%	Cultivate, Disqualify, Return to Pool, or Stewardship	At Discretion of Manager
Stewardship	Thank for Gift	18–24 months	25%	Cultivate or Permanent Stewardship	Yes

Stewardship and Permanent Stewardship

- Ask questions related to future giving to determine if these donors will return to cultivation.
- Set up a stewardship plan with all the actions you need to take annually, quarterly, and monthly.
- **Permanent Stewardship.** Prospect has made his/her ultimate gift.

Stewardship Personalization



Stewardship Segmentation

Website/Interactive Communities

- E-news list
- Web store purchases
- Online giving
- Online Forum/ community participant
- Social media outlets

Database

- Constituency code
- Giving history
- Giving designations
- Donor activities
- Address information

External Screening

- Real estate
- Business information
- Board memberships
- Gifts to other organizations

Interest

- Membership
- Alumni activities
- Student activities
- Volunteer activities

Relationship Management

- Prospect Manager
- Call reports/contacts
- Correspondence
- Moves information

Virtual Event Participation

- Invitation
- RSVP/Attended
- Sponsors
- Ticket buyers
- Donors
- Followers

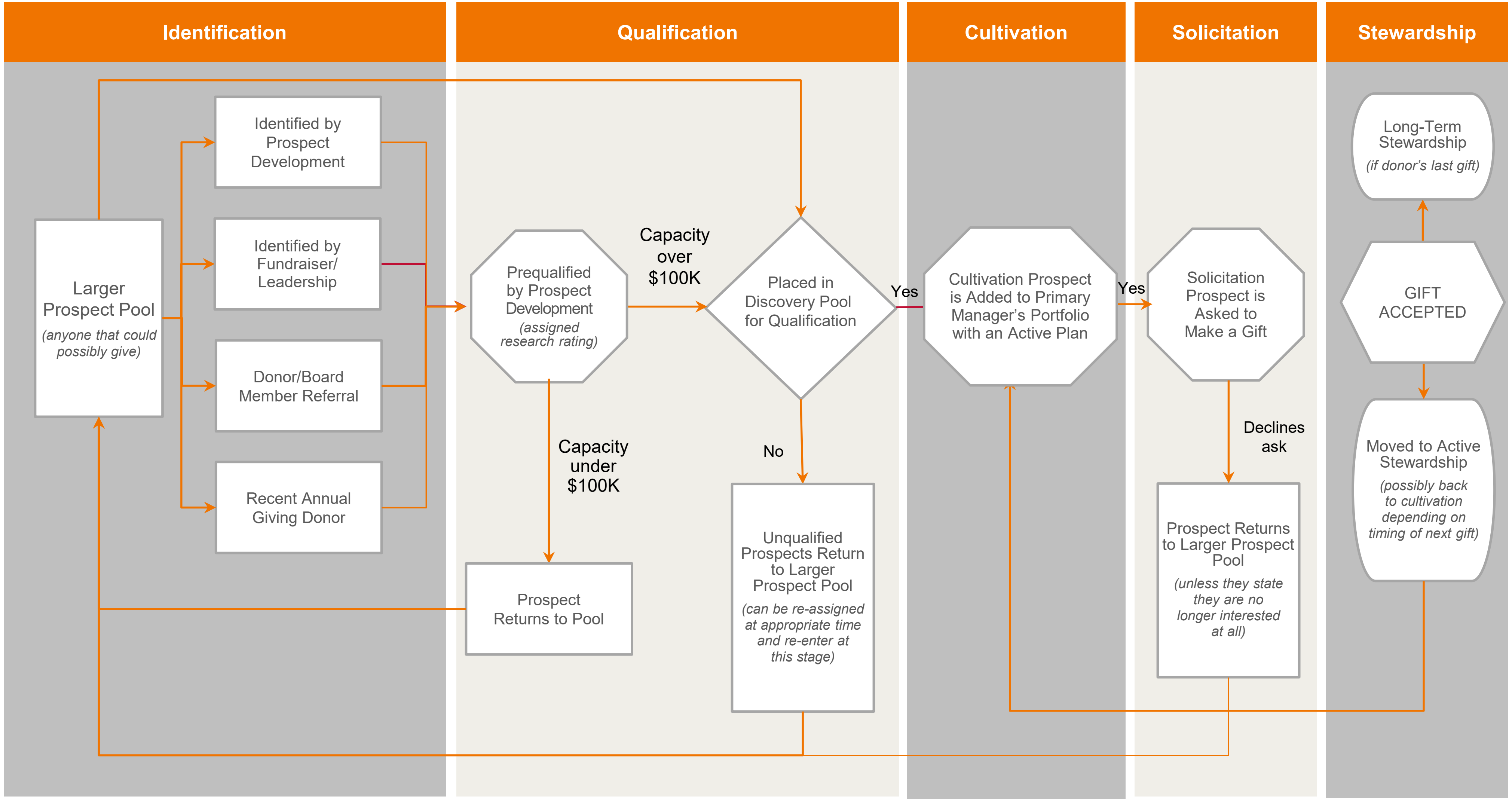
Communications

- Mailings
- Magazines
- Annual reports

Internal Processes

Work Process

Process to show to senior leadership and fundraisers.



Portfolio and Pipeline Management Meetings*

Meeting	Frequency	Owner	Attendees
Solicitation Pipeline	Monthly	Ops	Head of Dev, prospect development/ops rep, and managers of prospects with upcoming and outstanding solicitations.
Prospect Strategy	Weekly	Head of Dev	Head of Dev, prospect development/ops rep, and all managers of prospects being discussed.
Portfolio Review	Quarterly	Manager of FR	Manager/supervisor of fundraiser, prospect development/ops rep, and individual prospect managers.
Solicitation Clearance	Monthly	Ops	Head of Dev, prospect development/ops rep, managers with MG level solicitations that have not been cleared, and fundraisers in divisions impacted by solicitations.
Trustee Strategy	Quarterly	Head of Dev	Head of Dev and all managers of prospects being discussed.
Major Gift Qualified Leads	Monthly	Ops	Head of Dev, prospect development/ops rep, and all fundraisers who can take new prospect assignments.
Aged Disqualification Review	Annual	Ops	Prospect development/ops.

**See appendix for more information.*

Proposals: Policy

- Original plans documented and defined before adjusting them.
- Overwriting ask amounts/dates won’t allow you to track progress throughout the cultivation cycle.
- Set up regular virtual meetings to review outstanding proposals.
- Re-examine solicitation communication clearance process now—due diligence.

Gift Acknowledgment Policies*

- Write/revise your gift acceptance policy.
- What types of gifts will your organization accept now and after COVID-19?
- Gift handling and solicitation language.
- Partner with organizational colleagues.
- Disseminate widely.
- Consideration of benefits—fair market value.
- Include donor recognition policies.

**See appendix for more information.*

Reporting

Purpose

- Demonstrates fiscal accountability.
- Conveys continued appreciation.
- Communicates impact of the philanthropic support.

Elements

- Qualitative (storytelling, impact).
- Quantitative (metrics, financial reporting).
- Stakeholders (recipients and partners).
- Timing of Distribution.

Discussion

Thank you!

Bond Lammey and Amy Lampi

Additional Resources Found At:

Bwf.com/CurrentResources

Appendix

Prospect Strategy Meetings

Frequency. Monthly, names to be discussed varies by meeting.

Attendees. All managers on the prospects being discussed, development operations representative, and head of development.

Objective. Primary managers are expected to come prepared to discuss current strategy for prospects:

- Possible programmatic interests of the prospect.
- Communications strategy for the prospect.
- Anticipated date, purpose, and planned outcome of the next contact with the prospect.

Materials. A report of prospects to be discussed will be sent to all attendees prior to each meeting.

Follow-up. Development operations representative will send a report of assignment outcomes following the meeting.

Solicitation Pipeline Meetings

Frequency. Quarterly for all upcoming and outstanding solicitations.

Attendees. Primary managers on solicitations being discussed.

Objective. Review all outstanding solicitations, then prospects with solicitations planned in the current quarter.

Materials. A report of solicitations to be reviewed will be sent to all primary managers prior to each meeting in order to review and be prepared to discuss.

Follow-up. Primary managers will make requisite solicitation updates following the meeting.

Portfolio Review Meetings

Frequency. Annually in year one; quarterly in subsequent years.

Attendees. Primary managers, their supervisor, and their development operations liaison.

Objective. Recommend names to remove from the portfolio due to inactivity or low capacity/interest and names to add to the portfolio based on increased capacity/interest.

Materials. A report of prospects within a portfolio will be sent to the primary manager prior to the meeting. Any data irregularities with the portfolio (outdated stage, missing contact reports, past due proposals) will be flagged in these materials for update but will not be discussed in the meeting itself.

Follow-up. Development operations liaison will make requisite assignments/reassignments following the meeting.

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Qualified Leads Meetings

Frequency. Immediately following prospect strategy meetings.

Attendees. All attendees of prospect strategy meeting.

Objective. Development operations representative advances 2–3 names (or more as warranted by volume) of newly-identified prospects with major gift capacity in order to assign into portfolios. Names will be discussed for no more than five minutes each.

Materials. A report of prospects to be discussed will be distributed at the meeting. This report will include basic biographical information on each prospect, philanthropic interests, estimated capacity rating, known connections to your organization, and rationale for presenting the prospect for assignment.

Follow-up. Development operations representative will respond to any specific questions that arose during the meeting and will assign the prospects based on outcomes from the meeting. Assigned fundraisers are expected to attempt contact before the next prospect strategy meeting takes place.

Aged Disqualification Review Meetings

Frequency. Annually.

Attendees. Development operations.

Objective. Review anyone who was previously disqualified as a prospect whose disqualification review date occurs in the current calendar year and determine which of these prospects should re-enter the assignable prospect pool and/or go directly into a primary manager's portfolio.

Materials. A report of disqualified prospects meeting the above criteria. Should include capacity information, most recent gift and contact date, previously assigned primary manager, and reason for disqualification.

Follow-up. Development operations will advance any names re-entering the cultivation cycle at the next qualified leads meeting.

Gift Acceptance Policy Samples

For samples and resources, see the following links.

https://www.councilofnonprofits.org/tools-resources/gift-acceptance-policies

https://cacnc.org/wp-content/uploads/2016/06/Sample-Gift-Acceptance-Policies.pdf

https://bloomerang.co/resources/templates/gift-acceptance-policy-template/

https://www.guidestar.org/Articles.aspx?path=/rxa/news/articles/2010/gift-acceptance-policy.aspx

Resources

RICE UNIVERSITY
Center for Philanthropy & Nonprofit Leadership
Susanne M. Glasscock School of Continuing Studies

https://glasscock-info.rice.edu/openrice

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