

Cultivating Success through Portfolio Management

Indiana University Foundation - Prospect Management Team



INDIANA UNIVERSITY
FOUNDATION





Introductions

Stephanie McClure

Prospect Management Analyst



Molly Packard

Prospect Management Associate



Honorable Shoutout:

Gretchen Hercamp

Prospect Management Associate





Agenda

- **Systems and Team Structure**
- **Types of Meeting**
- **Portfolio Review Agenda**
 - **Talking points**
 - **Reports utilized**
- **Portfolio Maintenance**
- **Plan Lifecycle**
- **Questions**



Systems and Team Structure

Crimson

A customized CRM Blackbaud product

Tableau

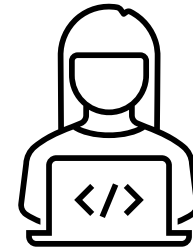
Fundraiser goals
Reporting

Fundraiser Performance Management

A customized CRM Blackbaud product
Targeter



Remote work environment





Fundraiser Meetings

- Portfolio Review & Research
- Strategy
- Onboarding
- Training
- Standing Unit Meeting
- Research Topics





Portfolio Discussion Agenda

- Current portfolio size and balance
- Current goal progress
 - Contacts/Pipeline asks/Dollars
- Opportunities
 - Outstanding “Response Pending” asks/outdated anticipated ask dates
- Plans with no significant activity in last 12 months
- Outdated Narratives
- Secondary Solicitors
- Research topics
- Fundraiser questions/issues

Who attends the meeting?

- Prospect Management
- Researcher
- AVP/VP
- Admin Support



Portfolio Size and Balance

Talking Points

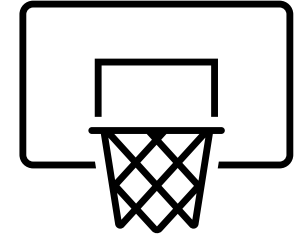
- % of time major gift fundraising
- Current portfolio size (+/- 10)
- Plan stage best practices



■ Qualification ■ Cultivation ■ Solicitation ■ Stewardship



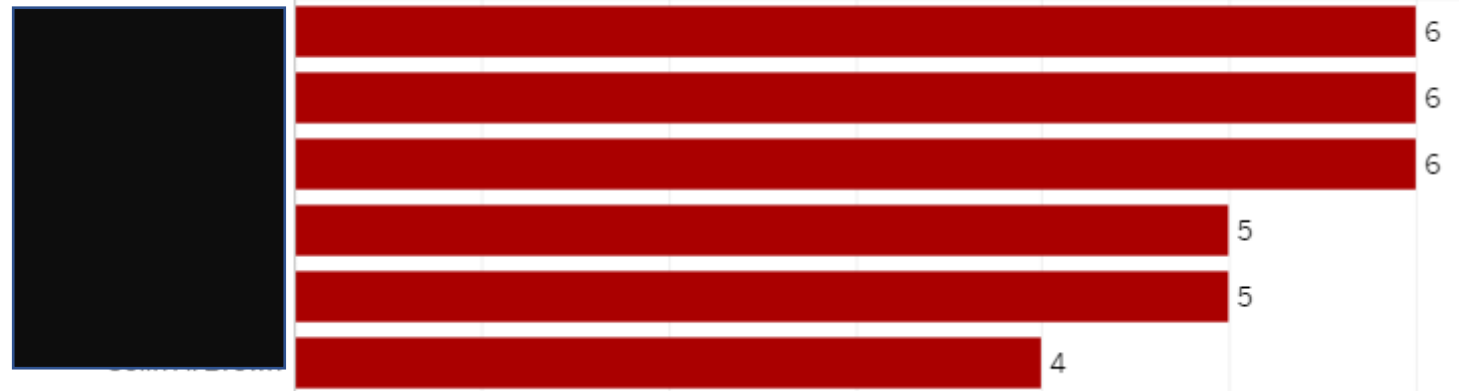
Goal Progress



Talking Points

- On track? Behind?
- Issues with contacts?
- Issues understanding how data is pulled?
- # of proposals submitted

Proposals Submitted by Fundraiser



Total Proposals Granted

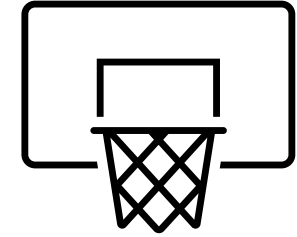
21

Total Amount of Proposals Granted

\$3,060,621



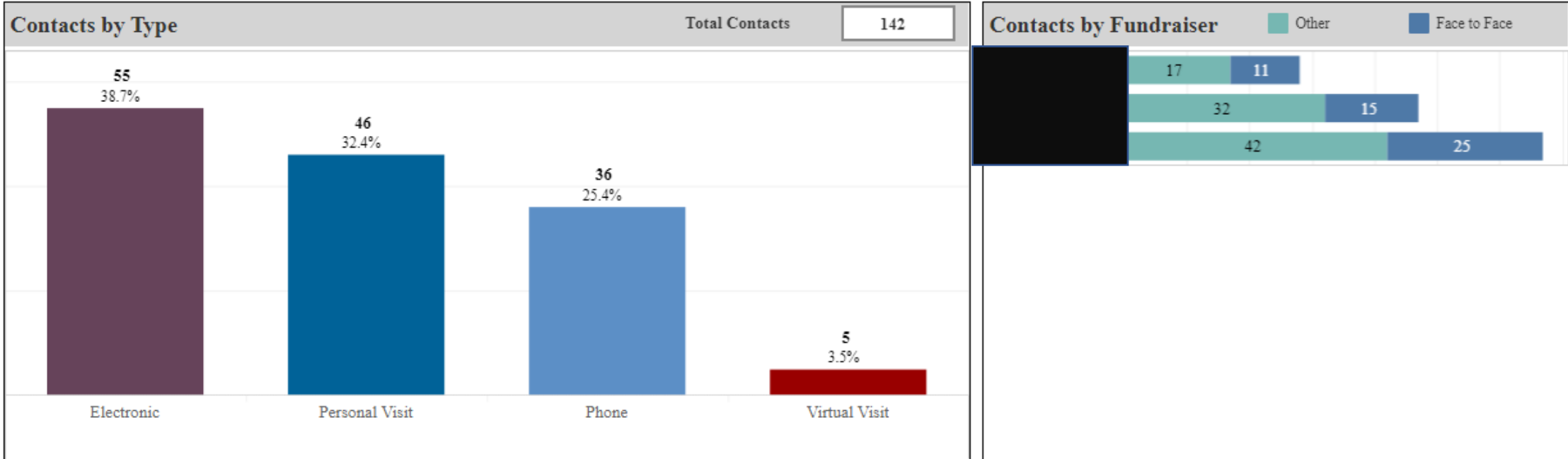
Goal Progress



Contact Details | Proposals Submitted | Proposals Granted



FY2025 Fundraiser Performance Contacts





Opportunities

Talking Points

- What asks are outstanding?
- Any 'response pending' asks over 6 months?
- Are any opportunities missing and need to be added?
- Issues understanding how data is pulled?

FY2024 Opportunity Summary

Staff Name	Fundraiser Site ID	Proposals Submitted Goal	Total Proposals Submitted (\$50k+)	# of \$50k+ Scheduled Opportunities	# of \$50k+ Opportunity Deficit/Surplus
[REDACTED]	IU-IN-MED	0	0	0	0
	IU-KO	10	3	0	-7
	IU-BL-AMUS	0	0	0	0
	IU-BL-AMUS	14	9	6	1
	IU-BL-ATHL	16	4	13	1
	IU-OT-IUF	6	1	0	-5
	IU-BL-KSOB	16	11	6	1
	IU-KO	6	1	1	-4



Fundraiser Prospect Contact Report

Talking Points

- Identify qualification prospects without contact in 3 months
- Discuss other prospects without measured contact in 12 months
- Send info after meeting

Constituent ID	Plan Stage	Plan Type	Plan Start Date	Last Measured Contact Date	Last Attempted Contact Date	Months Since Last Measured Contact	Months Since Last Measured Contact Grouped	Major Gift in the Last 10 Years?
8-12224213	Qualification	Qualification	7/23/2024	7/11/2024	Never	3	0-3 months	No
8-10999317	Solicitation	Major Gift	4/26/2024	8/1/2024	Never	2	0-3 months	No
8-10763267	Stewardship	Stewardship	10/9/2017	10/25/2023	7/24/2024	12	9-12 months	No
8-10958341	Qualification	Qualification	3/18/2024	9/16/2024	Never	1	0-3 months	No
8-10272095	Stewardship	Stewardship	2/29/2024	2/19/2024	10/30/2023	8	6-9 months	Yes
8-10340937	Stewardship	Stewardship	9/1/2016	5/6/2024	Never	5	3-6 months	Yes
8-10767785	Qualification	Qualification	9/28/2022	Never	10/12/2023	Never	12+ months	No
8-10662642	Cultivation	Major Gift	7/23/2024	1/12/2024	Never	9	6-9 months	No
8-10645366	Solicitation	Major Gift	7/23/2024	9/16/2024	Never	1	0-3 months	Yes
8-10859558	Qualification	Major Gift	5/21/2024	5/7/2024	4/24/2024	5	3-6 months	No
8-10630264	Stewardship	Stewardship	7/23/2024	4/12/2024	4/29/2024	6	3-6 months	Yes
8-10588138	Stewardship	Stewardship	12/11/2019	5/15/2024	Never	5	3-6 months	Yes
8-10813985	Cultivation	Major Gift	11/30/2022	11/16/2023	11/9/2023	11	9-12 months	No
8-10575575	Stewardship	Stewardship	10/17/2023	9/6/2024	7/21/2021	1	0-3 months	Yes
8-10377598	Stewardship	Stewardship	10/26/2018	9/16/2024	9/11/2024	1	0-3 months	Yes
8-10619713	Qualification	Stewardship	1/26/2018	2/5/2024	8/1/2024	8	6-9 months	Yes



Plan Updates

Talking Points

- How old is the plan?
- Does the narrative need to be updated? What is the current strategy?
- Do they need to remain secondary solicitor?

Molly M. Packard
Qualification - Potential Prospect Molly M. Packard - Prospect ▾

Prospect manager: Stephanie A. McClure	Start date: 10/7/2024	Opportunity status:	Amount:	Plan start date: 10/7/2024	Plan participants:
Primary manager: Stephanie A. McClure	Start date: 10/7/2024			Plan stage: Qualification	Secondary solicitors: Gretchen M. Hercamp - Development Officer
				Site: School of Education - Bloomington (EDUC)	

Details | Solicitors and Participants | Opportunities | Documentation | Planned Gifts | Manager History

Narrative [Edit](#) [📄](#)

10/07/2024
MGO will work to qualify for a gift to the School of Education.

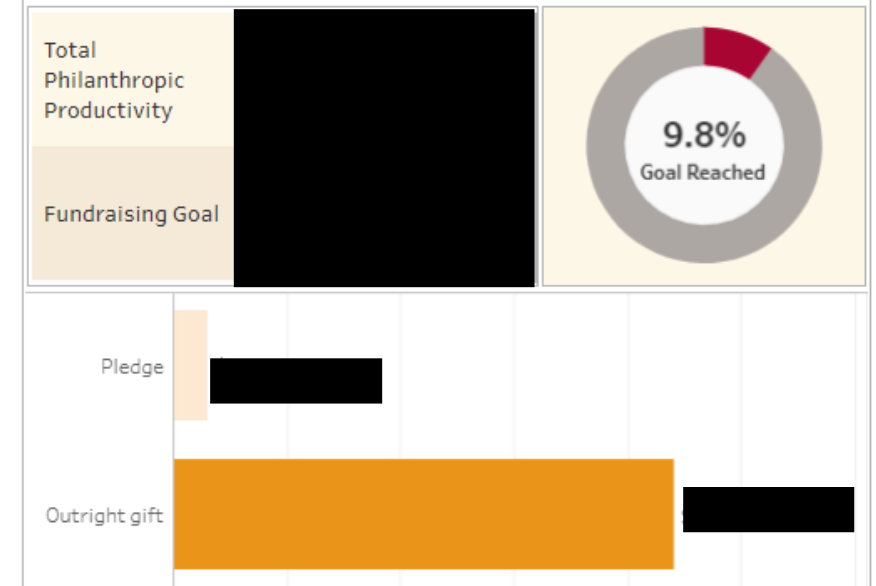


Portfolio Maintenance

Talking Points

- Plans with No Significant Activity
 - Goal is 75%+ Portfolio coverage
 - Identify prospects without measurable contacts in 12 months
- Outdated plan types and plan narratives
- Qualification plans that have been in place for over 90 days

FY25 Philanthropic Productivity



Total Prospect Influence (Last 12 Months) ^①

Non-Qualification Prospects	% of Prospects Contacted	Total Prospects Contacted by Fundraiser	Total Interactions with Prospects
244	75.4%	184	543

Pending Opportunities ^①

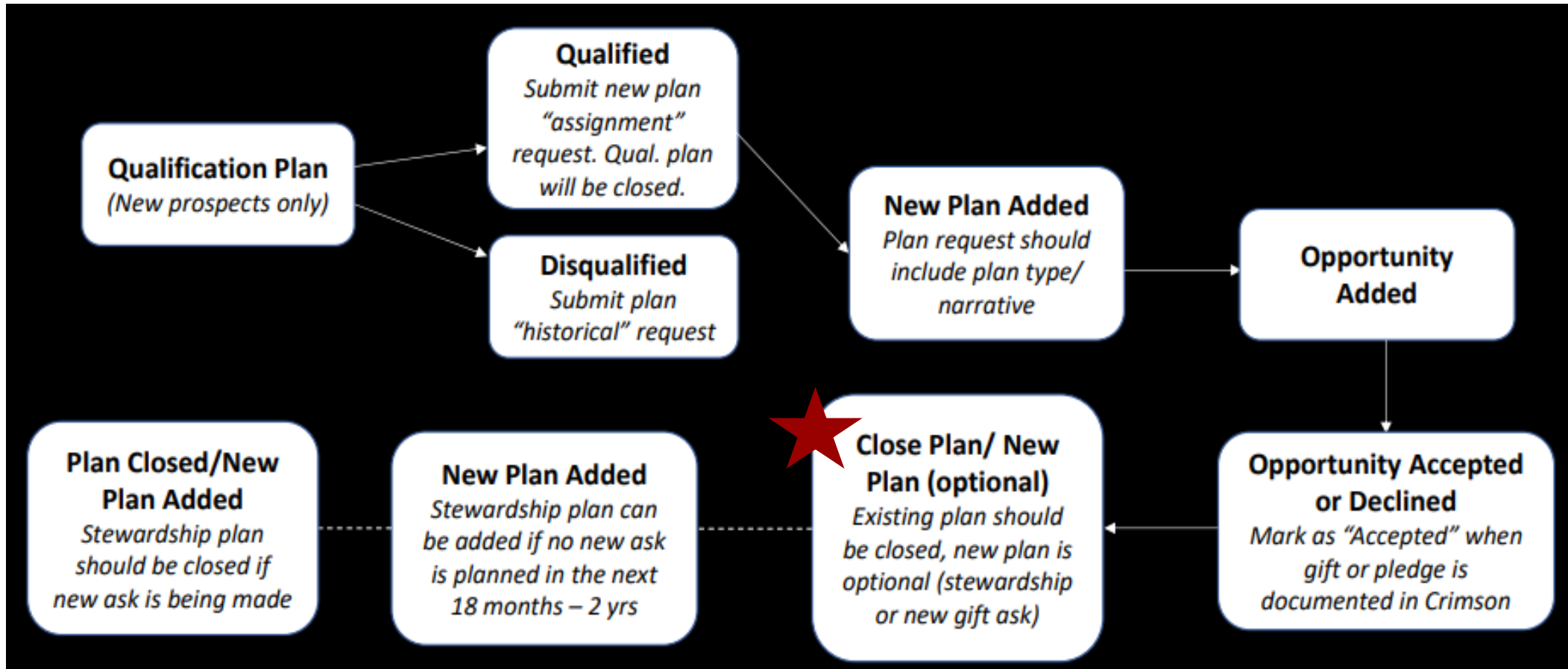
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Plan Lifecycle

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New Process:
Monthly Historical
Plan Closure





Questions?



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