



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



A Diversity, Equity, and Inclusion Initiative:

A JOURNEY TO BOTH DIVERSIFYING PIPELINES  
AND PORTFOLIOS AND COMMUNICATING  
FINDINGS TO EXTERNAL STAKEHOLDERS

**EXPLORE**  
PD25  
*New Depths*

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# AGENDA

- ☐ Introduction and Background
- ☐ The Prospect Research News (PRN) Tool
- ☐ DEI Data & Methodology
- ☐ Execution Process
- ☐ Challenges & Lessons Learned
- ☐ Impact & Insights
- ☐ Future Directions
- ☐ Group Discussion & Best Practices

# ABOUT THE PRESENTER

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Anaya Carter-Duckett  
(*She/They*)

Research Analyst, Villanova  
University

APRA DEIBJA Committee  
Member

Former APRA PA Executive  
Board Member

DEI Advocate





# BACKGROUND ON VILLANOVA UNIVERSITY

- Established in 1842, Villanova is a private, Augustinian catholic university in the suburbs of Philadelphia
- Our values are Veritas, Unitas, and Caritas which translates to Truth, Unity, and Love
  - These values are tied to the University's mission and everything we do reflects these values
- Currently, we are in the public phase of a campaign to raise \$1.25B

# PROSPECT RESEARCH AT VILLANOVA UNIVERSITY

- We are under the umbrella of Prospect Development, which includes Prospect Research and Prospect Management
  - Prospect Research = 7 team members
  - Prospect Management = 3 Team members
  - Senior Administrative Assistant
  - Executive Director



# BACKGROUND ON PREVIOUS DEI EFFORTS

- Prior to 2019: Reviewed annual lists in the *Philadelphia Business Journal* like "Diversity in Business Awards" and "Women of Influence." Additionally, we did prospecting around minority and women-owned businesses
- 2019-2020: We began experimenting with prospecting using internal demographic data on Ethnicity/Race to incorporate prospects into Prospect Research News (PRN)
- 2020-2021: We did a comprehensive screening via DonorSearch of all underrepresented alumni and current parents. About 1,830 records were reviewed and 1,300 of those records were assigned to either officer portfolios or pipelines

# BACKGROUND ON PREVIOUS DEI EFFORTS (CONT.)

- 2021: We added additional demographic data (race/ethnicity, gender, religion) to appropriate reports, including reports used by Prospect Management to make assignments
- 2021: We added DEI as an interest code to track prospects with interest in this area





# WHY THIS MATTERS

- University Mission and Strategic Plan
  - How are we fitting our work in the big picture?
- Frontline Fundraising Portfolios *should* be reflective of the makeup of alumni population and student population
  - Might not always be the case
- Transparency



# WHAT IS THE PROSPECT RESEARCH NEWS (PRN)

- The Prospect Research News (PRN) is a tool the research team uses to communicate recent appointments/promotions, prospects featured in the news, and prospects found during proactive research
- Different PRN Types
  - Weekly Edition
  - Special Editions
- Audience
  - Frontline Fundraisers
  - Communications Partners
  - Alumni Relations Partners
  - UA Leadership

# PRN AND DEI INTEGRATION

- Black History Month 2024: The First Edition of this initiative
  - The "Ah-Ha" Moment
- After Black History Month: How can we continue to use the PRN to highlight diverse prospects in a celebratory way?
  - Women's History Month
  - AAPI Month
  - Hispanic Heritage Month
  - Saint Patrick's Day
  - Veteran's Day



# STEP BY STEP EXECUTION

- Step 1: Mining the internal data on underrepresented alumni
- Step 2: Identifying prospects to feature
- Step 3: Integrating Prospects into PRN
- Step 4: Post PRN :)



# STEP 1 : MINING INTERNAL DATA

- Methods I have previously used
  - Pulling reports based on ethnicity coding
  - Performing relationship mapping based on diverse alumni groups
  - Leveraging Windfall, Live Alumni, and LinkedIn Sales Navigator
- Things I look for
  - Affinity or engagement with identity based professional development organizations
    - Professional or Personal

# STEP 2: IDENTIFYING PROSPECTS

- Most time-consuming part of the process
- Miniature Wealth Screening
  - Rating Prospects
  - Updated Records
  - Adding to Pipelines
- Selecting Prospects to Feature





# STEP 3: INTEGRATING PROSPECTS IN PRN

- Focuses less on the prospect's career journey and more on highlighting the interesting things the prospects has done
  - "Celebrating" our underrepresented prospects
- Things I have highlighted in past
  - Engagement in student mentorship
  - Participation in Identity based organizations
  - Small business owners
  - Content Prospects have created

# STEP 4: POST PRN

- All your hard work paid off!



# PRN EXAMPLE

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## *Espiritus Nova*



Ava E. Coleman '07 VSB (019122)

Abbott Elementary, Principal

VU Rating: \$100,000 - \$249,999

*New Rating*

Sub-Region: Philadelphia Greater

EN Themes: Women's Leadership, DEI, Entrepreneurship,  
Innovative Teaching/Learning, Student Life and Services,  
Prof. Dev. (Faculty/Staff)

Ava Coleman is the charismatic and often chaotic principal of Abbott Elementary, a fictional underfunded public school in Philadelphia.

Ava is known for her flamboyant style, sharp wit, and lack of traditional leadership skills. She secured her position through nepotism and often prioritizes personal entertainment over school responsibilities. Despite her unconventional methods and frequent clashes with staff—especially Janine Teagues—Ava occasionally reveals surprising depth and genuine concern for the students. Her character brings comic relief and sharp social commentary, serving as both a foil and unexpected ally to the dedicated educators around her.

Coleman holds a BS in Business Administration from Villanova University and an MA in Communications from Grand Canyon University.

If you would like to be considered for assignment, please submit a [Request for Prospect Management Support form \(RPM\)](#).



# CHALLENGES

- Data Limitation
  - The data we have for ethnicity/race is self-reported
  - Reporting on gender, sexual orientation, and other more sensitive identities is limited or doesn't exist
- Time
  - It takes anywhere from two weeks to a month to screen prospects for these issues
- PRN Overload
  - Being mindful of Weekly PRN and other Special Editions

# IMPACT & STRATEGIC VALUE

- Feedback from Frontline Team
  - Useful, timely, and great tool to leverage in donor conversations
  - Great Resource for finding identified prospects
  - Love that this is Driven by Villanova's Mission
- Solid Product and Great Resource
- PRN Tracking
  - Early Spring 2025 began tracking PRN Impact
    - 11 prospects actively engaged in between Stage 1 (Identification) and 5 (Stewardship)
- Established a pipeline of prospects to feature in the Weekly Editions to further diversify PRN overall

# LESSONS LEARNED

- We have some cool alumni!
- Consistent Communication is Key
- There is more than one way to mine for this data
  - Leverage the resources you have available
- Great opportunity to collaborate with DEI leadership





# FUTURE TRAJECTORY

- Potential Projects: Update my Info
- Continuing to integrate prospects proactively identified but not featured in identity months
- Mining Other Sources
  - Pitchbook
  - Business Journals
  - Social Media Engagement Tie In
- Editions focused on Religion



# CONSIDERATIONS

- Existing DEI Data
  - Is this something you are currently capturing in your system?
- Tools/Resources you have available
- The current political climate
  - Things in the DEI Space are very *fluid* right now
- Time and Bandwidth



# GROUP DISCUSSION

- How do you communicate news about prospects to your frontline staff?
- How are you identifying Diverse Prospects?
- Do you think this is something you can implement at your shop?
- What are some challenges you foresee with implementing this at your shop?



# FINAL THOUGHTS & TAKEAWAYS

- Finding ways to connect DEI initiatives to our work is hard but important
  - Find ways to support the work that is appropriate for your shop and make you feel good
- This work is ongoing, so expect it to be something you are revisiting often but also improving upon often
  - Last year's Black History Month PRN looked *completely* different than this year's
- Don't expect it to be easy but do expect it to be rewarding



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# THANK YOU!

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