



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



A Different Way to Approach Portfolio Pipelines and Movement

BREAKING IT DOWN



While you're waiting, complete your session evaluations in the mobile app!

IT'S ME! HI.



- Proud Michigander and MSU grad living in Pennsylvania
- Mom of two
- Nearly 20 years working in non-profits
- First 10 years as a frontline fundraiser
- Director of Prospect Development and Research at WCU Foundation

OUR OBJECTIVES

- Adapt key elements from the quadrant approach to refine and boost prospect outreach efforts.
- Assess tracking methods for enhancing major gift officer engagement and accountability.



WHAT'S GOING ON WITH YOU? (SLIDO)



REWIND TO FY23 (CY2022/23)



- Not moving identified prospects for 200+ days
- Winding down 150Forward campaign
- Little to no portfolio movement
- Portfolio review with research recommendations

THE ZOMBIELAND PROJECT

- Identified
 - 3 points of outreach
 - 2 different ways
 - Completed in 90 days
- 90 Days to move “zombies”
- After Q1, any remaining moved to Identified Removed
 - Available for assignment to anyone
 - 90 removed



INITIAL CHANGES



- Started weekly meetings with MGOs
- Standard agenda
- Reports back to management
- Regular identified prospect review and follow up



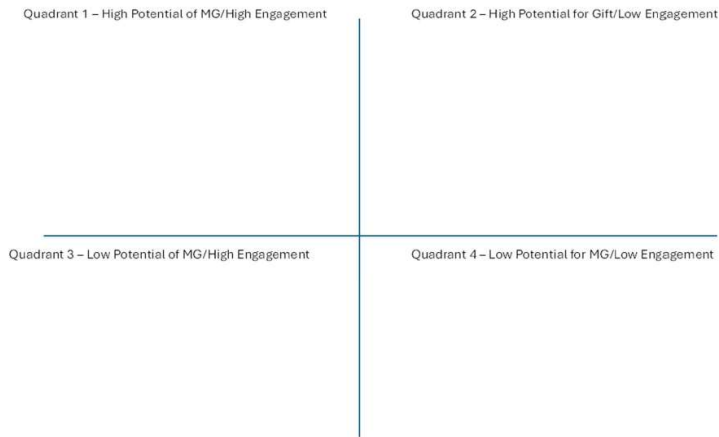
WORK TO DO - END OF FY23

Metrics (of assigned prospects)

- 76% no meetings last 6 months
- 17% lapsed or lost donors



SOMETHING HAS TO CHANGE



Q1 - High Potential of MG/High Engagement
Opportunities for upcoming FY

Q2 - High Potential of MG/Low Engagement
Opportunity in future FY

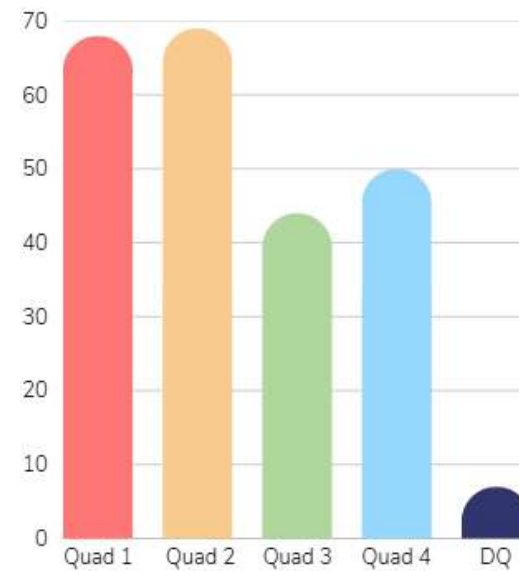
Q3 - Low Potential of MG/High Engagement
Decision by end of Q3

Q4 -Low Potential of MG/Low Engagement
Decision by end of Q1



INITIAL QUADRANT BREAKDOWN

INITIAL RESULTS



STAYING ACCOUNTABLE



WHAT ELSE CHANGED

- Added new Action Types
 - Qualification Outreach
 - Disqualification Outreach
- Quadrant Ratings
 - Part of weekly reports
 - Added to agenda for weekly meetings and 1:1
- Quarterly Team Reports/Meetings
- Use format for multiple years to track quadrants/changes



FY25 IN REVIEW

- 111 Prospects disqualified
- 20 Qualified from Identified
- Nearly \$6.6 MM in funded opportunities
- Identified Removed: 5

FY24 IN REVIEW

- Unable to consistently track
- 8 prospects qualified
- \$3.2MM in funded opportunities
- Identified Removed: 95



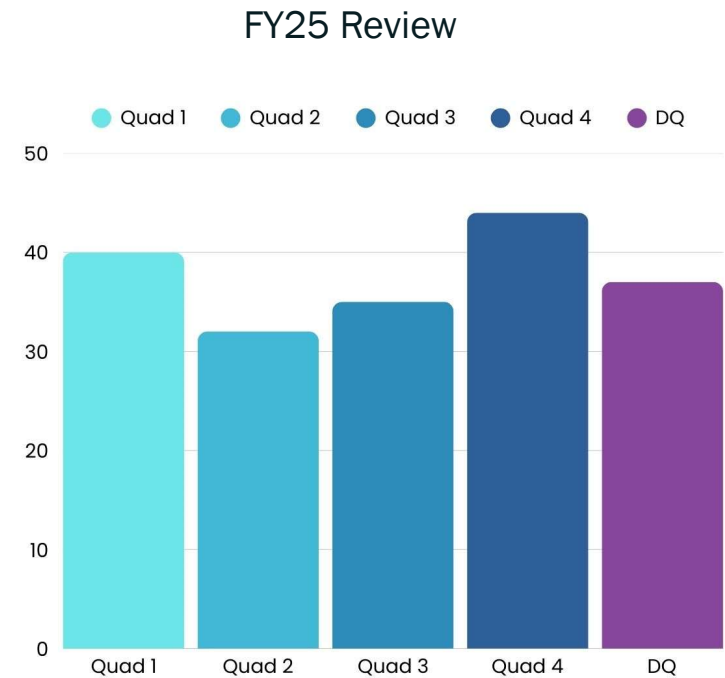
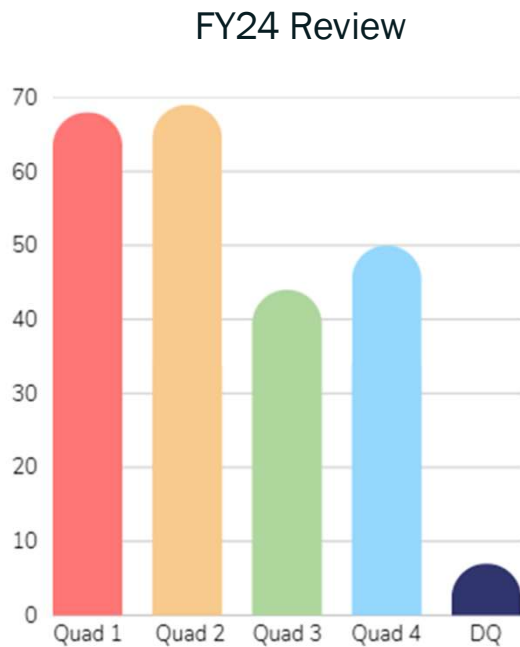
UNEXPECTED BENEFITS



- Portfolio turnover – fewer dropped relationships
- Better actions
- Fewer withdrawn opportunities
- Increase in funded opportunities
- More room for reactive assignments
- Smaller portfolios



QUADRANT BREAKDOWN COMPARISON



WORK TO DO - END OF FY25



Metrics (of assigned prospects)

- 57% no meetings last 6 months (25% decrease over FY23)
- 9% lapsed or lost donors (47% decrease over FY23)

FY26 AREAS FOR GROWTH

- Addressing MGO turnover in 4th Quarter
- Adding/reviewing opportunities for entire portfolio
- Adjusting number of identified
- Increasing phone calls for identified prospects





Contact Me!

EMAIL: BMORLEY@WCUFOUNDATION.ORG

LINKEDIN:

WWW.LINKEDIN.COM/IN/BETHANYAMORLEY

EXPLORE
PD25
New Depths

THANK YOU!

Please complete your session
evaluations in the mobile app.



TIPS FOR AN ACCESSIBLE PRESENTATION

1. Use Slide Layouts

- Use the built-in slide layouts in PowerPoint. These templates are structured to work with assistive technologies like screen readers.

2. Add Descriptive Alt Text to Images

- Right-click on images, charts, and other visuals, select **Edit Alt Text**, and provide a concise description.
- If the image is decorative, mark it as such.

3. Ensure Sufficient Color Contrast

- Use high-contrast color combinations between text and background.
- Tools like the **Accessibility Checker** (under **Review > Check Accessibility**) in PowerPoint or online contrast checkers can help verify contrast ratios.

4. Use Meaningful Link Text

- Avoid vague text like "Click here" for hyperlinks. Instead, use descriptive text.

5. Structure Content Clearly

- Use headings and bullet points to organize content logically.
- Avoid long blocks of text.

6. Avoid Animations and Transitions

- Minimize the use of flashing animations, which can be distracting or trigger seizures.

7. Test with Assistive Technology

- If possible, test your presentation using screen readers or other assistive tools to ensure compatibility.

Recommended Font Sizes

- **Titles/Headings:** At least **24–32 pt.**
- **Body Text:** At least **18 pt.**
- **Footnotes or Supplemental Text:**
No smaller than **14 pt**, but avoid small text unless absolutely necessary.

