



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



BUILDING THE FOUNDATIONS OF A PROSPECT DEVELOPMENT PROGRAM IN A SOLO SHOP



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



John Whitney

Development and Innovations Manager

TMS Global

Contact Information

Email: jwhitney@tms-global.org

Phone: (678) 542-9035

REALITIES OF BEING A ONE PERSON SHOP

- Burnout happens in months
- Morale is like a rollercoaster
- You want to be everything to everyone
- Few internally understand what you do
- Our role has many dependencies
- A task is not a just a task
- Mental health gets ignored



KEYS TO SUCCESS

- Learn what your Gift Officers Need
- Learn the Expectations Leadership have for the Program
- Determine where you Fit in the Budget
- Use APRA Tools and the Community
- Determine Quick Wins and Long Builds
- IT and Data Analyst/Infrastructure are your best friends



STAGES OF BUILDING A HOUSE

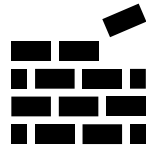
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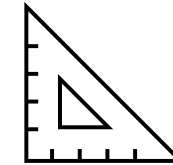
Stage 1: Planning and Design



Stage 2: Pre-Construction Prep



Stage 3: Laying the Foundation



Stage 4: Framing



Stage 5: Interior/Exterior Work



Stage 6: Move-in Ready

Stage 1: Planning and Design

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INFORMATION GATHERING STRATEGY

- Meet with Gift Officers individually at first and then as a group
- Meet with leadership in phases
 - First phase to understand expectations
 - Second phase to go over what you learned from gift officers
 - Third phase to understand budgetary process, opportunities and constraints
- Meet with IT and Data Analyst (if you have one) to understand what data is available to you and any constraints

DETERMINE QUICK BUILDS

- Research profiles
 - How do you get to a tiering framework?
 - Start with need to know and build a quarterly review plan to understand how to move from singular profiles to a tiering framework
- KPI Dashboard
 - Leadership's top priority and easy to develop in Excel or Power BI
 - Use this to prove program needs and opportunities
- SOP's
 - Define your vision of the program
 - Ongoing and evolving but it lays the blueprint for all to see

MOVES MANAGEMENT (THE LONG GAME)

- Create a calendar for when these moves take place
 - I prefer twice a year but I've also seen quarterly
- Meet with Gift Officers monthly
- Build KPI dashboards for each Gift Officer
- Create a rating system for donors using all datapoints at your finger tips
 - Who are Mid-to-Major?
 - Who are Pipeline-to-Mid?
 - What portfolio size makes sense?

Stage 2: Pre-Construction Prep

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VENDOR ASSESSMENT AND INTERNAL RESOURCE GATHERING

- Determine the vendor options for prospect development
- What tools are already in place and can they assist in your plan
- Get your data person alongside you in the process
 - Building the CRM queries
 - Creating LYBUNT and SYBUNT reports
- Develop a workflow management system and if possible, via a workflow tool (Asana, Monday, Visio, etc.)



Stage 3: Laying the Foundation

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OUTLINE PROGRAM CAPACITY

- What is the prospect research request process?
- Length of time it takes to fulfill research request (give yourself at **least 2 weeks**)
- Determine how often you screen donors (screen during the busiest giving quarters of the year)
- Determine how often you provide KPI reporting (What is the MVP?)
- Where does your reporting start and where does it end?
- Determine layers of support (prioritize needs of **fundraisers first**)

Stage 4: Framing

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SKELETON OF THE PROGRAM

- I've always seen it as a 4 room build
 - Master Bedroom – Prospect Research
 - Guest Bedroom – Reporting
 - Office – Program Planning
 - Bathroom – Moves Management
- See the “Office” as your room to plan for the future (ex. Expansion of tools, additional staff support, etc.)
- The “Bathroom” is where you're cleaning portfolios

Stage 5: Interior/Exterior Work

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EXTERIOR WORK

- Landscaping draws confidence!! (The more organized your program looks, the more people want to visit)
- Location matters!!
 - Where you sit in the office can determine program usage and affect information gathering
- Clean the gutters!! (This is your era. You are not your predecessor)
- Make your car visible (Knowing you're available makes you more valuable)



INTERIOR WORK

- Kitchen = The shops offerings (Keep it clean)
 - Incrementally experiment to test supply chain management
- Willy Wonka the “Office” – Make it the place where you dream about the future
- The furniture only needs to be reliable
- An “Open Space” concept is what draws more interest
 - Show gift officers and leadership a stress-free environment
- The “Garage” needs cleaning
 - Use this space to store the old way of doing things for reference

Stage 6: Move-in Ready

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TURNKEY EQUALS SUCCESS

- Make the shop easy for users to access
 - Email shop offerings and follow-up with availability to meet if needed
- Everything is new so flaunt it!!
 - Show users how improved the processes and products are
- Have an open house
 - Invite potential users and those within your community
 - The community will help you increase the value of the program

THANK YOU!

Please complete your session
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