



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



Activating Ultra High Net Worth Prospects in a New Market

CONNECTION CAPITAL

EXPLORE
PD25
New Depths

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

Activating Ultra High Net Worth Prospects in a New Market

CONNECTION CAPITAL

EXPLORE
PD25
New Depths

NICE TO MEET YOU

Dehnel Petre (she, her)

Sr. Prospect Research Analyst

The Nature Conservancy

Dehnel.Petre@tnc.org



Alexis Clausen (she, her)

Development Operations Associate, Principal Gifts

The Nature Conservancy

Alexis.Clausen@tnc.org



NEW FOCUS IN WEALTH MARKET INVESTMENT

Starting Momentum Without an Internal Network

- Importance of networking and building connections from scratch.
- Initial challenges and strategies.
 - Brief overview of org structure
 - historical collaboration challenges

THE SQUAD CONCEPT

Formation

- How the squad concept was developed.
 - Geography affinity for MA squad
 - Interest area(s)
 - Network/sphere of influence focus

Function

- Success stories and examples of squad effectiveness.
 - Work-style enmeshment
 - Clearly defined roles

EARLY DISCOVERY STRATEGY PLANS

Database Utilization

- Pushing out names from the database.
- Cold outreach strategies.

Efficiency in Grouping Prospects

- Gathering lists of names for screenings.
 - Clustering wealthy individuals and identifying key circles.
- Heat Map

UNDERSTANDING AFFINITY GROUPS

Behavior and Engagement

- How affinity groups think and what resonates with them.
- Strategies for engaging these groups effectively.
- Case Study: Private Equity Firm Principals Reception
 - Organizing events and inviting key individuals.
 - Follow-up strategies and leveraging insider help.

CONNECTION CAPITAL	ACCESS	MARKET PORTFOLIO ACTIVATION	OUTREACH OUTSIDE PORTFOLIO (# PG)	ATTENDING EVENT + 1:1 MEETINGS	OUTCOME METRICS
Internal staff	fundraiser/team collaborators	% (# prospects)	# of principal gift prospects/donors	# attended # invited w/ next steps identified	# engaged
Internal C-suite	executive leadership /teams names supporting with outreach	drill down prospect categories to specific companies/interests/etc.			# engaged and qualitative
SME (hook)	key anchors				
Global volunteer leaders	Board Directors (current & former)	___% unique + referral	stretch goal of # donors by funding priority		
Local/other volunteer leaders or donor peer connectors	Chapter/Trustee/managed donor leaders	top 3 priority prospects for market portfolio	top 3 priority prospects managed by fundraisers across organization		

ORGANIZING AND REVIEWING PORTFOLIOS

List Review Preparation

- One-time and continuous preparation needs.
- Example:
 - Global Board Member case study.

Direct Outreach and Trial and Error

- Peer Connector emailing strategies for better contact information.
- Learning from trial and error.

CREATIVE PROSPECT STRATEGY

Collaboration Across Teams

- Diversity of roles generating ideas
 - Research,
 - Operations,
 - and Fundraisers.
- Formalizing creative thinking through quarterly calls.

Next Steps and Strategy Advancement

- Reacting to research and discussions.
- Developing actionable next steps.

Activating Ultra High Net Worth Prospects in a New Market

CONNECTION CAPITAL

EXPLORE
PD25
New Depths

THANK YOU!

Please complete your session
evaluations in the mobile app.

