



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

Don't Assume!

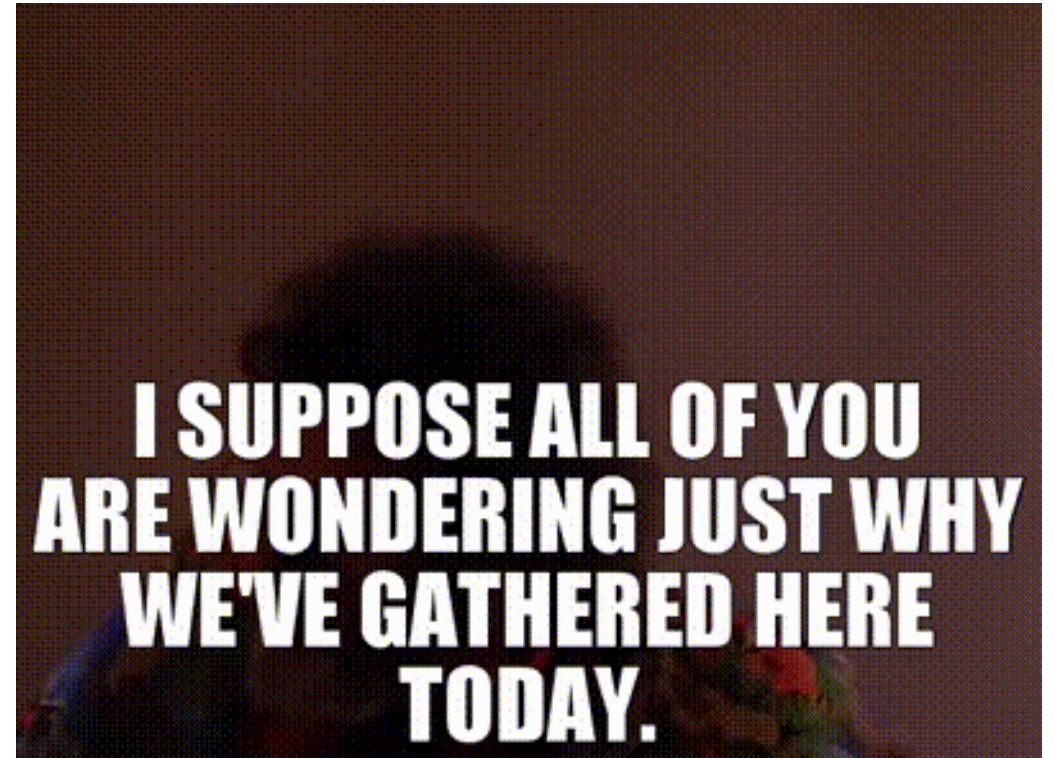
Challenging Assumptions and Improving Communication in the Prospect Management Space

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PD25
New Depths

The logo for 'EXPLORE PD25 New Depths' is located in the bottom left corner. It features the word 'EXPLORE' in a large, bold, yellow, serif font. Below it, 'PD25' is written in a smaller, white, sans-serif font. At the bottom, 'New Depths' is written in a yellow, cursive script font. A decorative, swirling line in a light blue-green color connects the 'PD25' text to the 'New Depths' text.

Agenda

- Introductions
- Objectives
- Communication Styles
- Myths v. Reality
- Assumptions
- Open Communication

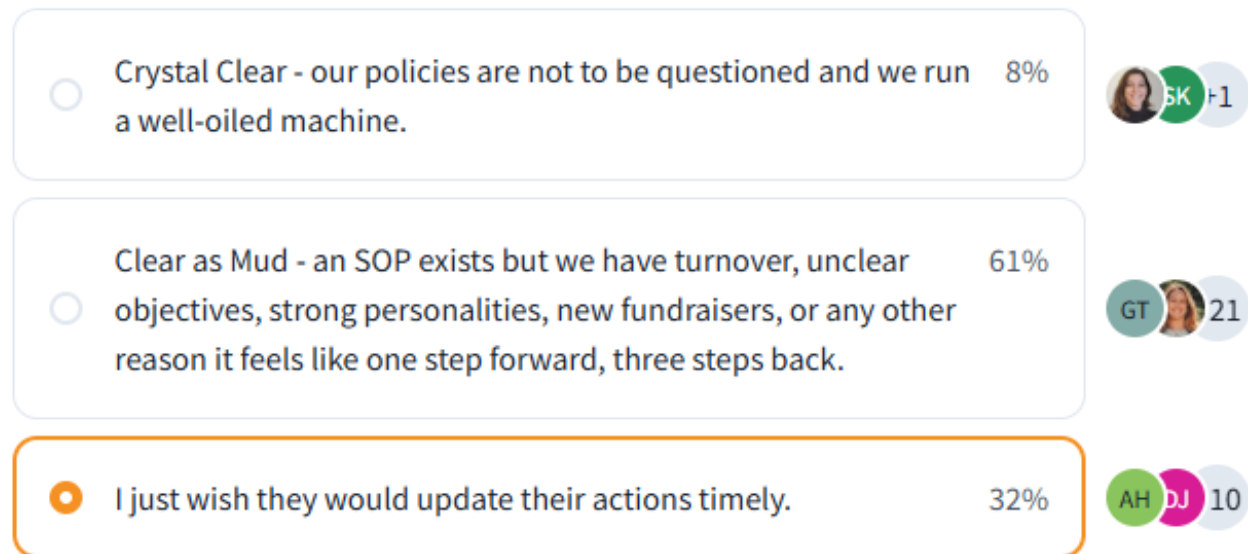


a plug for PRSPCT-L

The fundraisers I work with have a clear and consistent understanding of the expectations with portfolio management, reasonable research requests, why metrics exist, and an understanding of key fundraising concepts.*

You could have multiple fundraisers where most are playing by the rules - but we encourage you to consider the response as it relates to the few that might struggle to meet the standards.

See Less



TOTAL VOTES: 38

📁 Prospect Research 📁 Prospecting 📁 Major Giving 📁 Gift Officers 📁 Prospect Engagement



Amy Modin

- (Newish) Director of Research and Prospect Management with the U.S. Air Force Academy Association & Foundation
- Seven years in our industry (six spent in healthcare philanthropy)
- Cats and Turtle mom, cool grandma, wicked cook, purveyor of apple butter



I'm pretty good at disrupting the rested.

Emily Tedeschi

- System Director, Prospect Development and Research, CommonSpirit Health National Foundation
- 29(ish) years in the field; 22 in healthcare
- Lives 10 miles from the Jersey Shore
- Only child is going to college in three days



No, no, I'm fine. It's just so...dusty in here.

Our A-ha! Moment:

-
-
-
-
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-



g, re-

s?"

Wait a second.

- **Do** fundraisers know what they're doing?
- Are we giving them what they **actually** need....

...Or what we think they **should** need?

Objectives

This session will help fundraisers and prospect professionals:

- Understand how the way we communicate reveals assumptions we may not even know we have
- Identify specific assumptions related to prospect work that can get in the way of getting work done
- Suggest alternative ways of communicating to promote better working relationships

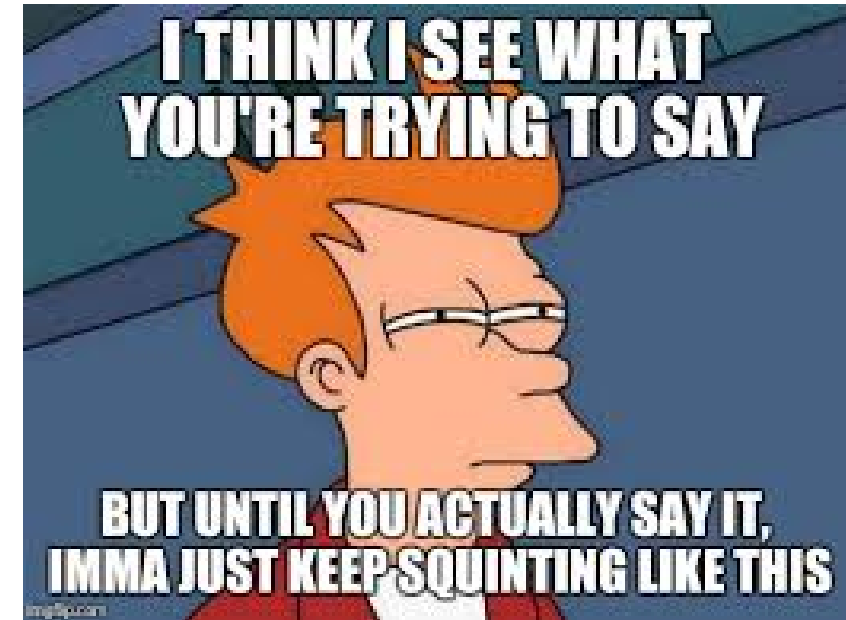


The hardest assumption to
challenge is the one you
don't even know you are
making.
- Douglas Adams

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Communication Styles

- Power dynamics: who's flying the plane?
- Indirect communication
 - “I don't want to tell you what to do, so I will suggest”
 - Leading someone to a conclusion rather than stating it directly
- Direct communication
 - “I don't want to waste your time. Let's get down to it.”
 - Problem solving



Communication Matters

- Feeling understood = feeling secure at work
- Leads to
 - Better problem solving
 - Willingness to take risks
 - Builds a culture of trust and respect



Prospect Researchers



What my friends think I do



What my mom thinks I do



What fundraisers think I do



What my kids think I do



What I think I do



What I REALLY do

Prospect Researchers: **Myths** v. Reality

Prospect researchers...

- Want to stay in the background
 - *Want to be part of the conversation*
- Only work on major gift prospects
 - *Provide research on mid-level prospects, transformational prospects, and corporate/foundation prospects*
- Only identify wealthy individuals
 - *Identify “connectors”, philanthropic individuals, and community leaders*
- Produce the same kind of research for every request
 - *Tailor research to the need and the stage of the prospect*

Prospect Development...**Myths** v. Reality

Prospect Development professionals...

- Are all about number crunching and reporting
 - *Identifies patterns and tracks progress towards goals*
- Do not impact day-to-day work for a fundraiser
 - *Provides fundraisers with new prospects*
- Wait, there's a difference between this and prospect research?
 - *Don't mind me, I am just going to lie down here*



FUNDRAISING



What my friends think I do



What my mom thinks I do



What society thinks I do



What my grandma thinks I do



What I think I do



What I really do

Fundraisers...**Myths** v. Reality

- Just want prospects to cultivate
 - *They may want guidance on engaging those prospects*
- Are always goal oriented
 - *Care about details that impact their goals*
- Don't see the value of capturing their activity in a database
 - *May care too much if they don't have anything else to show for their work*
- Will learn about processes and procedures only if they have to
 - *May want processes in place to ensure consistency*

Goals 😊❤️



Assumptions Close Down Communication

- When we make assumptions, we are taking shortcuts to understand someone or something.
- Those shortcuts often end up being anything but, well, *short*.
- They can also lead to dead ends.

HOW TO ASK FOR DIRECTIONS



1: NEVER ASK FOR DIRECTIONS



2: SEE STEP 1

Amy: My Assumptions

- The donor cycle is common sense
- The phone is not heavy
- The CRM is always up and open
- Everyone has the same comprehension of “status”
- A soft solicitation isn’t a solicitation
- Just work the portfolio - the discovery work is in there



Amy: My Assumptions

- Fundraisers come into the job with an understanding of the principles of prospect management.
- Quick action and follow up is the most important and effective use of a fundraiser's time.
- The goal in moving prospects is to get a response.



Emily: My Assumptions

- The phrase “strategic partner” means the same thing to fundraisers and prospect professionals
- Prospect professionals are first and foremost problem solvers
- Consistent, methodical work produces the best results
- Cold calls don’t work



Case Study: Assumptions Gone Wrong

- A chief philanthropy officer (CPO) is unhappy with the central foundation's vendor for donor acquisition using patient data.
- CPO believes the vendor's data was also going to provide major gift leads, but my team hasn't found any.
- He is REAL frustrated, I tell you what.
- I assume he wants me to solve the problem.



Case Study: Well, now I am frustrated.

What if you *can't* solve the problem?

- The program hasn't completed its implementation (they have a dashboard, but it's not built out)
- Relies on patient data that is still experiencing hiccups
- Principal aim is donor acquisition, not major gift prospecting

These are all factors outside of my control.



OUT OF MY CONTROL



Case Study: What Could Work Instead

- **Listen**

- Allow the CPO space to express their frustration.

- **Ask questions**

- What were the CPO's goals for this program?
- What could my team do to help them achieve this goal?

- **Plan next steps**

- Identify other ways to surface new prospects, and establish that process



"Man had always assumed that he was more intelligent than dolphins because he had achieved so much—the wheel, New York, wars and so on—whilst all the dolphins had ever done was muck about in the water having a good time.



But conversely, the dolphins had always believed that they were far more intelligent than man—for precisely the same reasons."

— Douglas Adams,

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Open Communication

- Always have a goal in mind
- **...but also be flexible...**
- ...and consider other ways of communication if what you're doing isn't working.
- **Never forget the other person is just another human.**



How Can I Communicate Better?

My Boss reminds me...

- Create the framework
 - *A Guide of How to Work Together*
 - *What do “they” care about?*

My Peers remind me...

- Need Leadership backing
 - New AVP just on-boarded
 - Learn what’s important

My Experience reminds me...

- Listen, retain, stay consistent
 - Make sure there is no question that I champion their success

How Can I Communicate Better?

What's been happening...

- SOP in progress
 - Clarify the confusions
 - Keeping it simple

Weekly Email Updates

- Overall MGO progress: metrics
 - Celebrate wins
 - Highlight gaps

Monthly Newsletter

- Each section talks about a Move
 - Review, Remind
- What can RPM do for you?
- Gift Lists, Opportunity Lists

Examples of Updates & Newsletter

Weekly RPM Update

Why Metrics are Important

March 24, 2025

Isn't the \$\$ bottom line good enough?

Metrics help to provide a framework to work toward reaching a goal.

of MG Solicitations (2025 Goal = 175)

Looking at this number informs us about how proactive our fundraising efforts are. If we had a donor give a \$25M gift for the first quarter of 2025, and 28 MG solicitations occurred, are we done with our fundraising for the year? By the way... exceeding the goal does NOT always indicate a bigger goal the following year.

Substantive Contacts (2025 Goal = 800)

This is a measure that is controllable and can improve skills and portfolio strength. Perhaps the gift might not show up this year, but success is being built for the following year. These "meetings" move the prospect through the donor cycle, and can help a fundraiser achieve the desired amount of "asks" to help the team work toward meeting the MG Solicitation goal.

Major Donor Acquisition Rate

Is your cultivation paying off? How many assigned prospects in your portfolio are "new" to major giving? Here is where the substantive contact action thrives. This is another way to appreciate the success and impact of the fundraiser's work.

		# of Asks Goal (2025)	Total Amount Asked	Total Amount Accepted for 2025 Ask (Verbal)	Substantive Contact Goal	# of Qualification Attempts	# of Qualification turned Cultivation
2025 Revenue Goal (Gifts Credited)	\$25,000,000	175			800		
YTD	\$1,440,696	24	\$5,626,002	\$3,412,501	120	29	15
% to Goal	5.76%	13.71%			15.00%		
		(31 total MG Asks)					
MGOs only (+ Kelly, Mark)		* a defined Ask amount of support	Accepted, Verbal & Pending, Declined	Verbal & Accepted	"Interactions"		
all gifts credited	\$25K and greater includes \$1 PG	All asks any amount					

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PROSPECT DEVELOPMENT 2025

RPM CORNER

| MAR 2025

March Newsletter

Happy Spring



IT'S THE END OF THE FIRST QUARTER...

A review of MG & PG Goals

- Raise **\$5M** for the **Founding Director Fund**
- Secure **FIVE** new Founding Directors under 55
- Raise **\$25M** in new cash, pledges, estate gifts
- Achieve **800** substantive donor prospect contact
- Present **175** gift proposals in 2025
- Secure **35** new Polaris Society members

[Scroll down to see current standings...](#)

Research and Prospect Management (RPM)
2025 Strategic Objectives

- AUDIT, REVISE, CREATE PROCESSES, PRACTICES, METRICS AND SOPs THAT ALIGN WITH INDUSTRY STANDARD TO ENSURE A STRONG, STABLE FUNDRAISING OPERATION AND DONOR PIPELINE
- FOCUS ON PIPELINE DEVELOPMENT. **EMPHASIS ON DONOR QUALIFICATION, INCREASED PORTFOLIO MOVEMENT...**
(FOLKS, THIS WAS DECIDED BEFORE I ARRIVED!!)

Qualification

GOAL: DETERMINE IF THEY STILL BELONG IN THE PORTFOLIO

This is ALSO Discovery work!
Are assigned prospects being connected with?
Or attempted to be connected?

Portfolio Review Meetings being scheduled!



apra

Food for Thought

- **The Power of Talk: Who Gets Heard and Why**
(Deborah Tannen)
- **Embracing Detachment: The 'Let Them' Theory**
- **Research Matters** (Helen Brown Group)
- **Blinker Alert: Research is Changing Lanes**
(Jennifer Fila's blog)

You can contact us ... and find us on LinkedIn

Emily: emily.tedeschi@commonspirit.org

Amy: amy.modin@usafa.org

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THANK YOU!

**Please complete your session
evaluations in the mobile app.**

