



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

## New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



# ENHANCING FUNDRAISING EFFICIENCY THROUGH TIERED SERVICES

**EXPLORE**  
PD25  
*New Depths*

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



# INTRODUCTION



**Alda Bolsteins**

Assistant Director  
Prospect Management  
IU Foundation



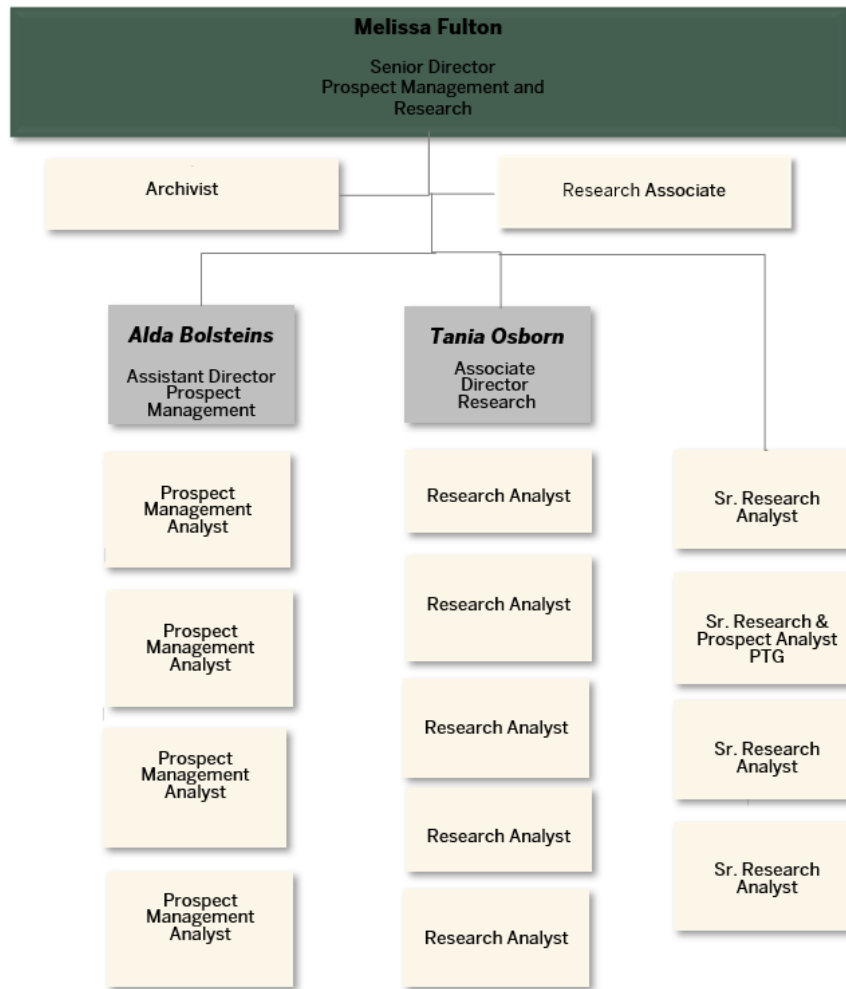
**Tania Osborn**

Associate Director  
Research  
IU Foundation

## Agenda

- Introductions
- Identified Challenges
- Implemented Solutions
- Results Achieved
- Discussion and Q&A





## IUF Prospect Management & Research Team

- 4 Prospect Managers
- 9 Researchers
- 1 Archivist
- 1 Research Associate



# INDIANA UNIVERSITY & IU FOUNDATION

63 IU Campuses,  
Schools, and  
Units

130 IU  
Fundraisers with  
Portfolios

1M+ Living IU  
Alumni & Friends



# INDIANA UNIVERSITY & IU FOUNDATION



The Bicentennial Campaign  
raised \$3.9 billion



Blackbaud CRM, Fundraiser  
Performance Management,  
Tableau, LexisNexis, Kindsight  
(iWave) and Insightful



Matrix Management Structure  
– the lead development officer  
reports to the IU Foundation



Leadership sets CSU and  
individual fundraising goals  
and metrics



# OUR OLD WAYS



# WHY MAKE A CHANGE?

Our approach was holding us back:

- **Frustrated prospect management and research staff**, who aren't set up for success
- **Too much time spent supporting the wrong fundraisers** - and not enough time for those who need it most
- **Endless meetings, limited capacity** - we're stretched too thin to meet every need
- **Support isn't targeted where it matters most** - high-priority fundraisers aren't receiving the focused time and expertise they need





# A TIERED APPROACH!

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Organizing tasks, services, or support into different levels based on priority, complexity, or need.

Each tier receives a different level of attention, resources, & service.

This helps allocate time and effort more effectively.



# GOALS

At IU, the goal-setting system is structured so that each Campus, School, and Unit (CSU) has a specific dollar goal, which cascades down to individual fundraiser metrics.

CSU Goal: \$6,000,000

Fundraiser 1: 200 contacts, 16 asks over \$50k, \$2,000,000 goal. (100% MGO)

Fundraiser 2: 170 contacts, 14 asks over \$50k, \$1,000,000 goal, (85% MGO)

Fundraiser 3: 200 contacts, 16 asks over \$50k, \$2,000,000 goal (100% MGO)

Fundraiser 4: 200 contacts, 0 asks over \$50k, \$0 goal (0% MGO)



# CALCULATING SCORES

CSU SCORE + INDIVIDUAL FUNDRAISER SCORE

## CSU Tiering Based on Dollar Goals

Score	CSU Goal Range
1	\$1,000,000 and above
2	\$300,000 – \$999,999
3	\$50,000 – \$299,999
4	\$1 – \$49,999
5	\$0

## Fundraiser Tiering Based on Individual Goals

Score	Individual Goal Range	% Major Gift Officer (MGO)
1	\$400,000 and above	85% – 100% MGO
2	\$250,000 – \$399,999	40% – 84% MGO
3	\$50,000 – \$249,999	20% – 39% MGO
4	\$1 – \$49,999	0% – 19% MGO
5	\$0	0% MGO



# CALCULATING TIERS

Fundraiser Name	CSU	Fundraiser Title	Contact Goal	Face to Face / Virtual Visits	MG (\$50k+) Asks Made Goal	Total Dollars Closed Goal	Major Gift Officer %	CSU Goal	CSU Score	Individual Score	Total Score	Tier (total score-1)
Abby Smith	CSU Name	Development Manager	100	50	8	\$750,000	50	\$750,000	2	2	4	3
Anne Kline	CSU Name	Director of Development, Major Gifts	300	150	16	\$2,750,000	100	\$24,000,000	1	1	2	1
Tim Johnson	CSU Name	Director of Development	140	70	10	\$400,000	70	\$550,000	2	1	3	2
Bret Moore	CSU Name	Director of Development	200	92	13	\$750,000	75	\$4,000,000	1	1	2	1
Alan Groves	CSU Name	Director of Development	200	100	16	\$2,000,000	100	\$6,250,000	1	1	2	1
Kate Winter	CSU Name	Associate Director of Development	150	75	3	\$250,000	25	\$4,250,000	1	4	5	4
Derek Green	CSU Name	Donor Experience Officer	150	0	0	NA	NA		3	3	6	5
Amanda McClean	CSU Name	Executive Director of Development	170	85	14	\$2,000,000	85	\$3,000,000	1	1	2	1
Turner Summer	CSU Name	Strategic Partnerships and Engagement	200	100	NA	NA	0	\$22,000,000	1	5	6	5



# SERVICES PROVIDED: TIER 1 AND 2

FUNDRAISERS WITH A DOLLAR GOAL OF \$400,000 + AND ARE MORE THAN 50% MAJOR GIFT OFFICER

## Research:

- Onboarding for New Fundraisers
- Research Strategy Meeting: 4 per year
- Contact information
- Prospect Research: Bio & Wealth, Trip lists, Keyword search, Recent donor screening, Organizational & Relationship connections
- Training Sessions
- Due Diligence
- Event Profiles
- News of Interest
- CSU Staff Meetings
- On-site/Virtual Collaboration Workday or Office Hours
- Dedicated archivist to digitize historical donor files

## Prospect Management:

- Onboarding for New Fundraisers
- Portfolio Reviews: 2 per year
- Prospect Strategy Consultations
- Major Gift Opportunity Reviews
- Training Sessions
- Goal Progress Strategy Sessions
- Data Auditing and Updates
- CSU Staff Meetings
- On-site/Virtual Collaboration Workday or Office Hours
- Training Series Presentations





# SERVICES PROVIDED: TIER 3 AND 4

FUNDRAISERS WHO HAVE A DOLLAR GOAL OF \$100,000+ AND ARE LESS THAN 50% MAJOR GIFT OFFICER

## Research:

- Onboarding for New Fundraisers
- Research Strategy Meeting: 1 per year
- Contact information
- Prospect Research: Bio & Wealth, Trip lists, Keyword search, Recent donor screening
- Training Sessions
- News of Interest
- CSU Staff Meetings
- Dedicated archivist to digitize historical donor files

## Prospect Management:

- Onboarding for New Fundraisers
- Portfolio Reviews: 1 per year
- Prospect Strategy Consultations
- Major Gift Opportunity Reviews
- Training Sessions
- Goal Progress Strategy Sessions
- Data Auditing and Updates
- CSU Staff Meetings
- Training Series Presentations



# SERVICES PROVIDED: TIER 5

FUNDRAISERS WHO ONLY HAVE CONTACT GOALS OR FUNDRAISERS THAT ARE LESS THAN 20% MAJOR GIFT OFFICER

## Research:

- Onboarding for New Fundraisers
- Contact information
- Prospect Research: Bio & Wealth
- Training Sessions
- News of Interest
- Dedicated archivist to digitize historical donor files

## Prospect Management:

- Onboarding for New Fundraisers
- Training Sessions
- Goal Progress Check-in
- Data Auditing and Updates
- Training Series Presentations



Fundraiser Name	CSU	Fundraiser Title	Contact Goal	Face to Face / Virtual Visits	MG (\$50k+) Asks Made Goal	Total Dollars Closed Goal	Major Gift Officer %	CSU Goal	CSU Score	Individual Score	Total Score	Tier (total score-1)
Anne Kline	CSU Name	Director of Development, Major Gifts	300	150	16	\$2,750,000	100	\$24,000,000	1	1	2	1

Score	CSU Goal Range
1	\$1,000,000 and above
2	\$300,000 - \$999,999
3	\$50,000 - \$299,999
4	\$1 - \$49,999
5	\$0

Anne Kline is a **Tier 1** Fundraiser

Score	Individual Goal Range	% Major Gift Officer (MGO)
1	\$400,000 and above	85% - 100% MGO
2	\$250,000 - \$399,999	40% - 84% MGO
3	\$50,000 - \$249,999	20% - 39% MGO
4	\$1 - \$49,999	0% - 19% MGO
5	\$0	0% MGO

- Portfolio Reviews: 2 per year
- Research Strategy Meeting: 4 per year
- Prospect Strategy Consultations
- Major Gift Opportunity Reviews
- Goal Progress Strategy Sessions
- Training Sessions
- Contact information
- Prospect Research: Bio & Wealth, Trip lists, Keyword search, Recent donor screening, Organizational & Relationship connections
- Due Diligence
- Data Auditing and Updates
- Event Profiles
- News of Interest
- Training Series Presentations
- Dedicated archivist to digitize historical donor files
- CSU Staff Meetings
- On-site/Virtual Collaboration Workday or Office Hours



**PROSPECT DEVELOPMENT 2025**



Fundraiser Name	CSU	Fundraiser Title	Contact Goal	Face to Face / Virtual Visits	MG (\$50k+) Asks Made Goal	Total Dollars Closed Goal	Major Gift Officer %	CSU Goal	CSU Score	Individual Score	Total Score	Tier (total score-1)
Turner Summer	CSU Name	Strategic Partnerships and Engagement	200	100	NA	NA	0	\$22,000,000	1	5	6	5

Score	CSU Goal Range
1	\$1,000,000 and above
2	\$300,000 - \$999,999
3	\$50,000 - \$299,999
4	\$1 - \$49,999
5	\$0

Tuner Summer is a **Tier 5** Fundraiser

Score	Individual Goal Range	% Major Gift Officer (MGO)
1	\$400,000 and above	85% - 100% MGO
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5	\$0	0% MGO

- Onboarding for New Fundraisers
- Training Sessions
- Prospect Research: Bio & Wealth
- Contact information
- Goal Progress Strategy Sessions
- Data Auditing and Updates
- Training Series Presentations
- News of Interest
- Dedicated archivist to digitize historical donor files

# RESULTS

- More major gift research
- Developed a strategic roadmap for planning time and meetings with fundraisers based on tiers
- Increased capacity to meet with all fundraisers
- Empowered prospect management & research with the ability to provide alternative options
- Ensured consistent service delivery across all funds





## Prospect Management Roadmap

FY25

		Q1			Q2			Q3			Q4		
Area of Focus		JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
Portfolio Reviews	Q1: 15~ portfolio reviews (1-3 a week)	5~Reviews	5~ Reviews	5~Reviews									
	Q2: 15~ portfolio reviews (1-3 a week)				5~Reviews	5~ Reviews	5~Reviews						
	Q3: 15~ portfolio reviews (1-3 a week)							5~Reviews	5~ Reviews	5~Reviews			
	Q4: 15~ portfolio reviews (1-3 a week)										5~Reviews	5~ Reviews	5~Reviews
Audits (2~ hours a week - focus on current FY first)	Weekly (13 audits)												
	Quarterly (22 audits)												
	Biannually (4 Audits)												
	Annually (9 Audits)												
Opportunity Review	Ongoing - during portfolio reviews and pulling data from Tableau quarterly												
Vacant Portfolios & Onboarding New Fundraisers	Ongoing - 10~step process to review a portfolio when a fundraiser leaves & 3~part onboarding meetings												
Training Series	Prep and Present ontopic												
Key Business Reviews (KBR)	KBRPrep												
	KBRMeetings												
	KBRDebrief												
Professional Development	APRA IN Conference					Fall						Spring	
	APRA PD Conference												
	Great Lakes Forum												
DXO Plan Work	Bulk adding new plans (2,000~) and making plans historical (2,000~)												



# Research Roadmap

## Area of Focus

Area of Focus	
Portfolio Health Analysis	Tier 1 & 2 - 1 per calendar year (tier 4, 5 & 6 do not need a portfolio health analysis)
Research Strategy Meetings	Tier 1 & 2 - 2 meetings per year Tier 3 & 4 - 1 meetings per year
Recent Donor Reports	All CSU Units
Proactive Prospects	All CSU Units
Collaboration Day	Tier 1 & 2
Vacant Portfolios & Onboarding New Fundraisers	All Tiers



# INCREASE IN PROACTIVE RESEARCH

Total Prospects	FY22 & Before	FY23	FY24	FY25
	395	942	1,205	2,159



# ONGOING CHALLENGES

- The current numerical tiering system could benefit from a more intuitive naming approach.
- Some team members are still hesitant to suggest alternative solutions or recommend specific actions.
- We provide tier-specific services to fundraising staff while keeping the tier status confidential, as we aim to maintain positive relationships.
- We must stay flexible to address needs that fall outside the tier system.



# DISCUSSION & SHARING

Do you have a formalized tiering system, or is it more ad hoc?





# DISCUSSION & SHARING

What criteria do you use to determine who receives more support or resources?



# DISCUSSION & SHARING

What services would you reserve for your top-tier stakeholders? What would be reduced for lower tiers?



# DISCUSSION & SHARING

What are the tasks or services you or your staff are struggling to get to?



# QUESTIONS?

**EXPLORE**  
*New Depths*



**PROSPECT DEVELOPMENT 2025**

**apra**

# CONTACT US WITH ANY ADDITIONAL QUESTIONS



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Assistant Director  
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Associate Director  
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**Alda Bolsteins**

Assistant Director, Prospect Management at  
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**Tania Osborn**

Associate Director, Research  
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# THANK YOU!

Please complete your session  
evaluations in the mobile app.

An aerial photograph of a city grid, showing streets, buildings, and green spaces, rendered in a monochromatic green color.

apra