apra | INSIGHT PHILANTHROPY RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

FROM OVERLOOKED TO ENGAGED

Capturing Hidden, Forgotten, and Untapped Prospects with a Referral Tracking System That Drives Fundraising Success Transforming Prospect Discovery and Qualification Through Data and Accountability

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

USC Prospect Referral Tracking System

INTRODUCTION

EXPLORE

PD25

New Depths

INTRODUCTIONS

Prisca Zaccaria
Executive Director - Prospect Development
University of South Carolina

Jay Trussell
Sr. Director of Information Systems
University of South Carolina

AGENDA

- WHY → Vision for the Tracking System
- Lifecycle of a Proactive Prospect
- Custom CRM Build
- Fundraiser Notifications & Responsibilities
- Where Are They Now? – Pipeline Status of Referrals
- Analytics for Leadership
- Real-World Culture Shift
- Challenges and Lessons Learned
- Practical Takeaways
- Q&A / Thank You

WHAT'S THE PROBLEM?

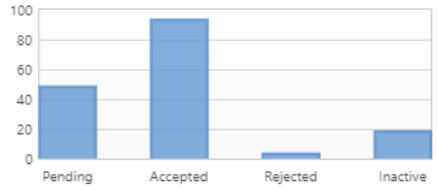
- How do we ensure every referred prospect is tracked from identification to outcome?
- Which fundraisers or units are acting on the referrals they receive?
- Are referrals being advanced, stalled, or declined — and why?
- What percentage of referrals result in qualification or a gift?
- How does referral activity inform strategy and demonstrate research impact?

Prospect Referral Management

Referrals by Status

Site:

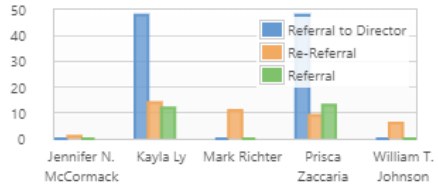
Showing: Prospects sent ever.



Referral Types by Researcher

Researcher:

Showing: Prospects sent ever.



Referrals by Site

Site:

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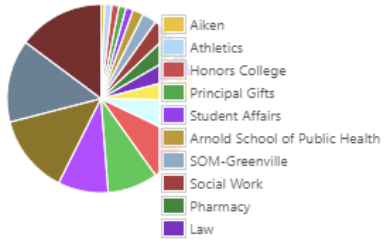

Referrals Over Time

Site:

Showing: Prospects sent ever.

Prospect Referrals (203)

Add Referral | Configuration | Filters | More

Due Date: | Referred To: | Referred By: | Referral Type: | Referral Status: | Site: | Apply | Reset

< 1 2 3 4 5 ... 7 >

Add Date	Due Date	Referred To	Referred By	Prospect	Referral Type	Referral Status	City	Site	Prospect Referral Plan C...	Prospect Referral Plan
9/23/2024	10/13/2024	LaTanza Duncan	Kayla Ly		Referral	Rejected	New York	Principal Gifts		
10/18/2024	11/7/2024	Braden N. Shain	Prisca Zaccaria		Referral to Director	Accepted	Greenwich	Information and Comm...	✓	CIC – Prospect Referral ...
10/11/2024	10/31/2024	William T. Johnson	Kayla Ly		Referral to Director	Accepted	San Jose	Engineering and Compu...	✓	CEC - Prospect Referral ...
7/29/2024	8/18/2024	William T. Johnson	Kayla Ly		Referral to Director	Accepted	North Reading	Engineering and Compu...	✓	MCEC - Prospect Referr...
10/14/2024	11/3/2024	Mark Richter	Prisca Zaccaria		Referral to Director	Pending	Wooster	Moore School of Business		
10/2/2024	10/22/2024	Braden N. Shain	Kayla Ly		Referral to Director	Accepted	Greenville	Information and Comm...	✓	CIC - Prospect Referral ...
10/11/2024	10/31/2024	William T. Johnson	Kayla Ly		Referral to Director	Accepted	Riverside	Engineering and Compu...	✓	CEC - Prospect Referral ...
9/9/2024	9/29/2024	George T. Greaves	Kayla Ly		Re-Referral	Accepted	Mount Pleasant	Moore School of Business	✓	DMSB – Prospect Referr...
8/28/2024	9/17/2024	Mark Richter	Kayla Ly		Referral to Director	Re-Referred	Mount Pleasant	Moore School of Business	✓	DMSB – Prospect Referr...
9/19/2024	10/9/2024	Lauren J. Johnson	Kayla Ly		Referral to Director	Accepted	Brentwood	Arnold School of Public ...	✓	ASPH - Prospect Referra...
10/10/2024	10/30/2024	Savannah M. Lee	Kayla Ly		Referral	Accepted	Brentwood	Arnold School of Public ...	✓	ASPH - Prospect Referra...
8/28/2024	9/17/2024	John N. Gaston	Mark Richter		Re-Referral	Accepted	Fort Lauderdale	Moore School of Business	✓	DMSB – Prospect Referr...
8/27/2024	9/16/2024	Mark Richter	Kayla Ly		Referral to Director	Re-Referred	Fort Lauderdale	Moore School of Business	✓	DMSB – Prospect Referr...
10/17/2024	11/6/2024	Braden N. Shain	Prisca Zaccaria		Referral to Director	Pending	Darlington	Information and Comm...		
7/30/2024	8/19/2024	Wesley J. Daniels	Kayla Ly		Referral to Director	Accepted	Columbia	Hospitality, Retail and S...		
10/21/2024	11/10/2024	Bryan D. Winters	Prisca Zaccaria		Referral to Director	Pending	Columbia	SOM-Columbia		

WHY THIS SYSTEM WAS NEEDED

- **Siloed discovery** = lost opportunities – Research was finding prospects, but the information wasn't always shared or visible across teams.
- **Accountability gaps** – Without clear tracking, it was hard to see who acted on a referral… and who didn't.
- **The "more prospects" paradox** – Fundraisers asked for more, yet some referrals were ignored or dismissed without action.
- **Campaign clock ticking** – Leadership needed faster, scalable ways to surface and move high-potential prospects.
- **Missed re-engagement chances** – Without a system, inactive referrals often fell through the cracks instead of being revisited.

VISION FOR THE TRACKING SYSTEM

- **Cross-team collaboration** between IT, Data Solution, RPS and Fundraisers
- **Embedded accountability** through automated workflows and CRM integration
- **Progression tracking** from referral to qualification, cultivation, and solicitation
- **Time-sensitive insights** to flag underutilization and identify stalled prospects and to enable follow-up, re-referral, and performance analysis
- **End-to-end visibility** of proactive prospects from discovery to gift
- **Fewer missed opportunities** by highlighting gaps in outreach and inactivity

LIFECYCLE OF A PROACTIVE PROSPECT → HOW MANY NEW PROSPECTS REFERRALS ARE NEEDED?

HOW MANY REFERRALS?

Proactive Prospects = 100

Vetted Prospects = 50

Referrals = 25

DO contacts = ~ 12

Visits = 4 - 6

Asks = 2 - 3

GIFT = 1

THE PROCESS →LIFECYCLE OF A REFERRAL

Identify
Prospect Research identifies a prospect based on need

Tracking System
Prospect Research enters a referral into CRM database, explaining why the referral is assigned to the Development Officer

Email Reminder
The Development Officer will receive a 10-day reminder if they have not accepted the referral

Referral Approval
All principal capacity prospects go through Approvals in Teams with Prospect Strategy Director and leadership before being referred to a Development Officer

Automated Email
An automated email is sent to the Development Officer notifying them of the referral

THE PROCESS →LIFECYCLE OF A REFERRAL

Create Suspect Referral Plan
Prospect Strategy creates a referral plan with the unit's naming convention

Add Prospect Team
The prospect strategist and prospect researcher are added to the referral/prospect team

150 Day Outreach
Prospect Strategy contacts the Development Officer

Referral Accepted
The Development Officer accepts the referral

Create Engagement Timeline
From plan inception, an outreach is attempted within 60 days, or an initial meeting takes place within 150 days. If not, the plan will expire and be made historical

60 Day Outreach
Prospect Strategy contacts the Development Officer

Plan Made Historical or Timeline Extension
Prospect Strategy makes the plan historical or extends the deadline if there is no outreach within the given timeline

USC Prospect Referral Tracking System

FROM AN IDEA TO REALITY

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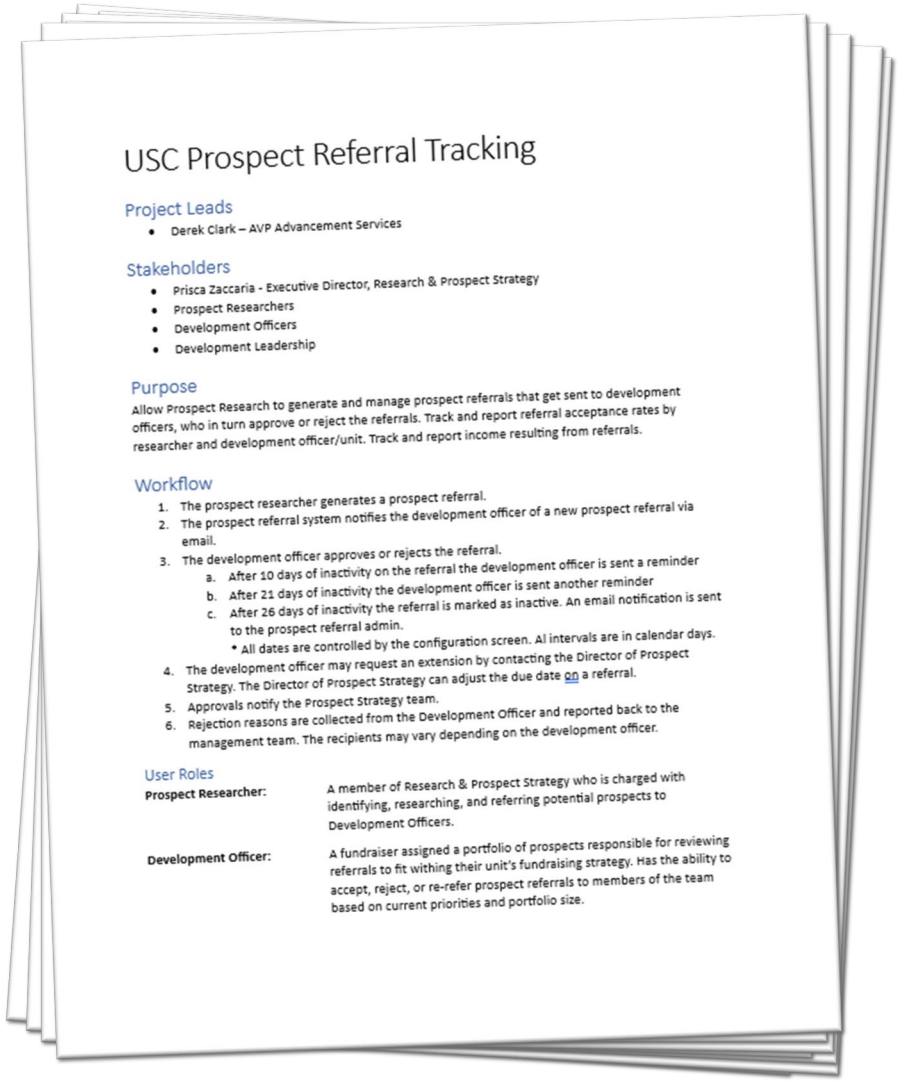
New Depths

DESIGN DOCUMENT

- Before programming starts, clearly define the requirements.
- Collaborate with reporting teams to ensure everything they need is being captured.
- Document is kept up to date throughout the lifecycle of the project.



USC Prospect Referral Tracking

Project Leads
- Derek Clark – AVP Advancement Services

Stakeholders
- Prisca Zaccaria - Executive Director, Research & Prospect Strategy
- Prospect Researchers
- Development Officers
- Development Leadership

Purpose
Allow Prospect Research to generate and manage prospect referrals that get sent to development officers, who in turn approve or reject the referrals. Track and report referral acceptance rates by researcher and development officer/unit. Track and report income resulting from referrals.

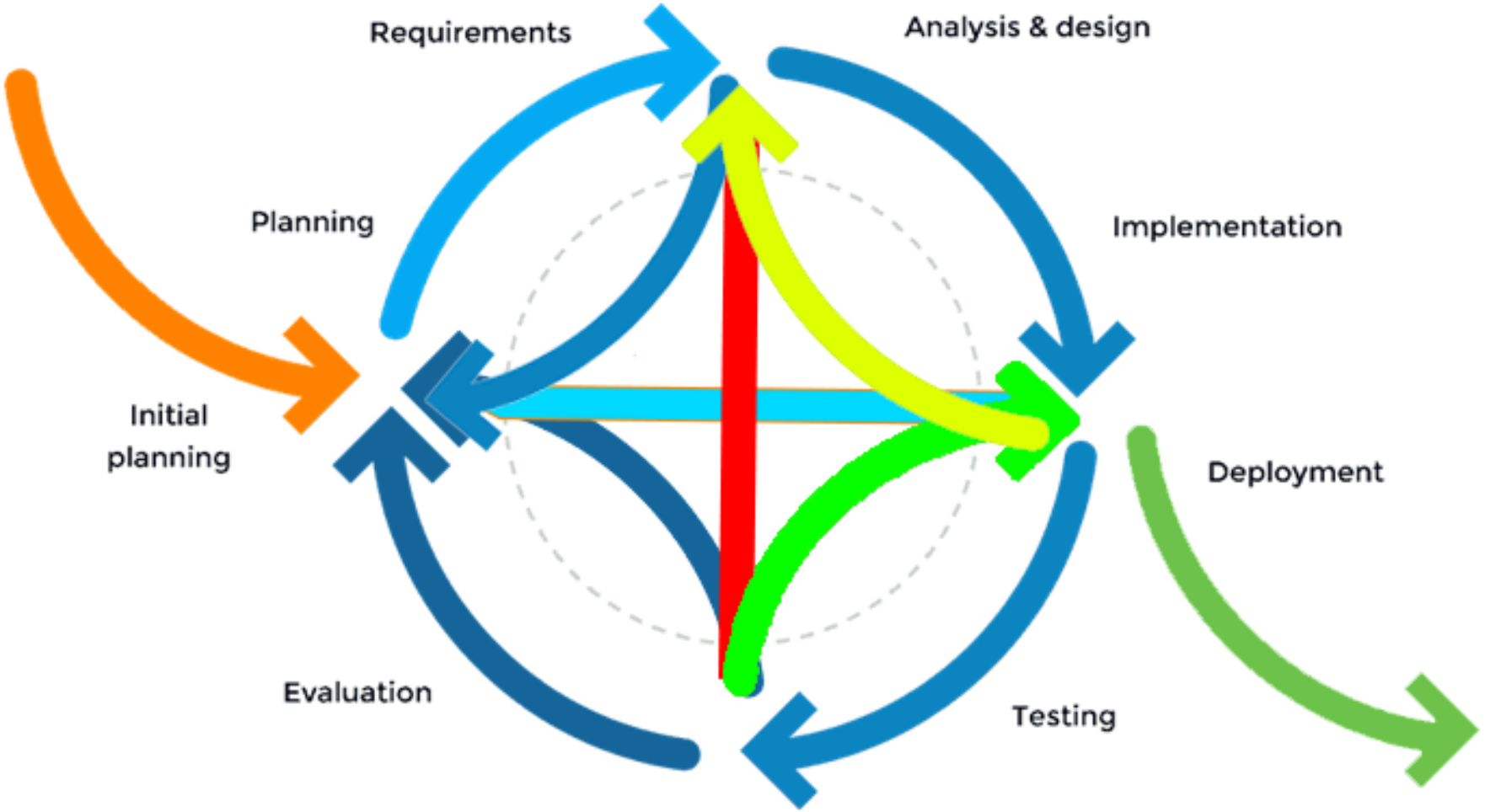
Workflow
1. The prospect researcher generates a prospect referral.
2. The prospect referral system notifies the development officer of a new prospect referral via email.
3. The development officer approves or rejects the referral.
   a. After 10 days of inactivity on the referral the development officer is sent a reminder
   b. After 21 days of inactivity the development officer is sent another reminder
   c. After 26 days of inactivity the referral is marked as inactive. An email notification is sent to the prospect referral admin.
   * All dates are controlled by the configuration screen. Al intervals are in calendar days.
4. The development officer may request an extension by contacting the Director of Prospect Strategy. The Director of Prospect Strategy can adjust the due date on a referral.
5. Approvals notify the Prospect Strategy team.
6. Rejection reasons are collected from the Development Officer and reported back to the management team. The recipients may vary depending on the development officer.

User Roles

Prospect Researcher:	A member of Research & Prospect Strategy who is charged with identifying, researching, and referring potential prospects to Development Officers.
Development Officer:	A fundraiser assigned a portfolio of prospects responsible for reviewing referrals to fit withing their unit's fundraising strategy. Has the ability to accept, reject, or re-refer prospect referrals to members of the team based on current priorities and portfolio size.

EXPECTATIONS

REALITY


Requirements
Analysis & design
Planning
Implementation
Initial
planning
Deployment
Evaluation
Testing

DESIGNING A SOLUTION – KEY REQUIREMENTS

- Referral dashboard and referral entry tools
- Required justification fields for rejected referrals
- Automatic reminders and plan templates
- Integration with Blackbaud CRM

PROJECT TIMELINE

- Initial Development began August 2023
  - Project started with code originally written and provided by UGA
- Version 1.0 deployed mid September 2023
- First review at ~6 months
- Additional functionality added almost monthly

USC Prospect Referral Tracking System

SYSTEM OVERVIEW

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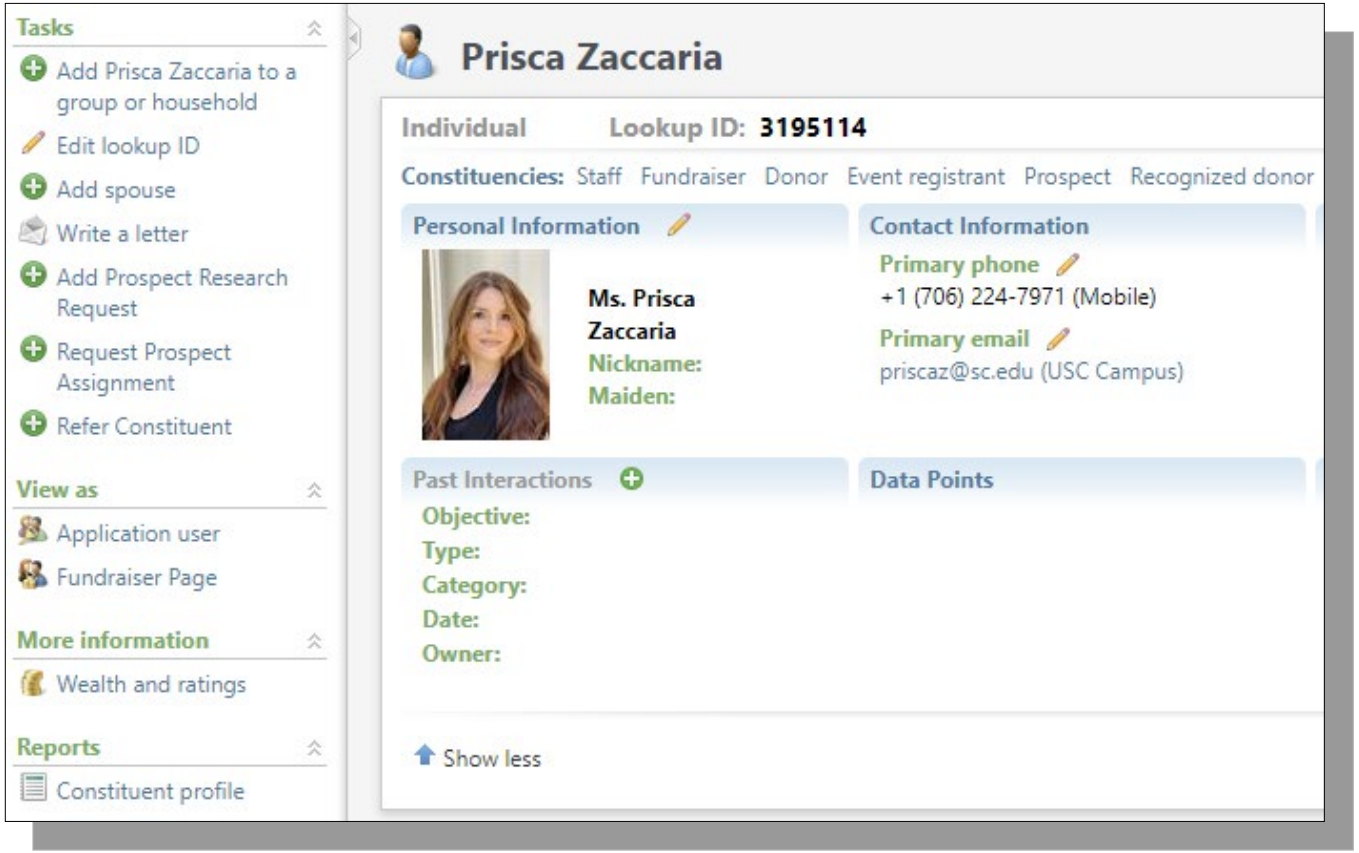
New Depths

THE PROCESS

Referral: Refer from Constituent Record or from USC Prospect Referral Management.

Referral Entry: Research Analyst takes information from Proactive Prospect Entry to the Referral Tracking System to send to the fundraiser.



STEP 1

Add a referral:

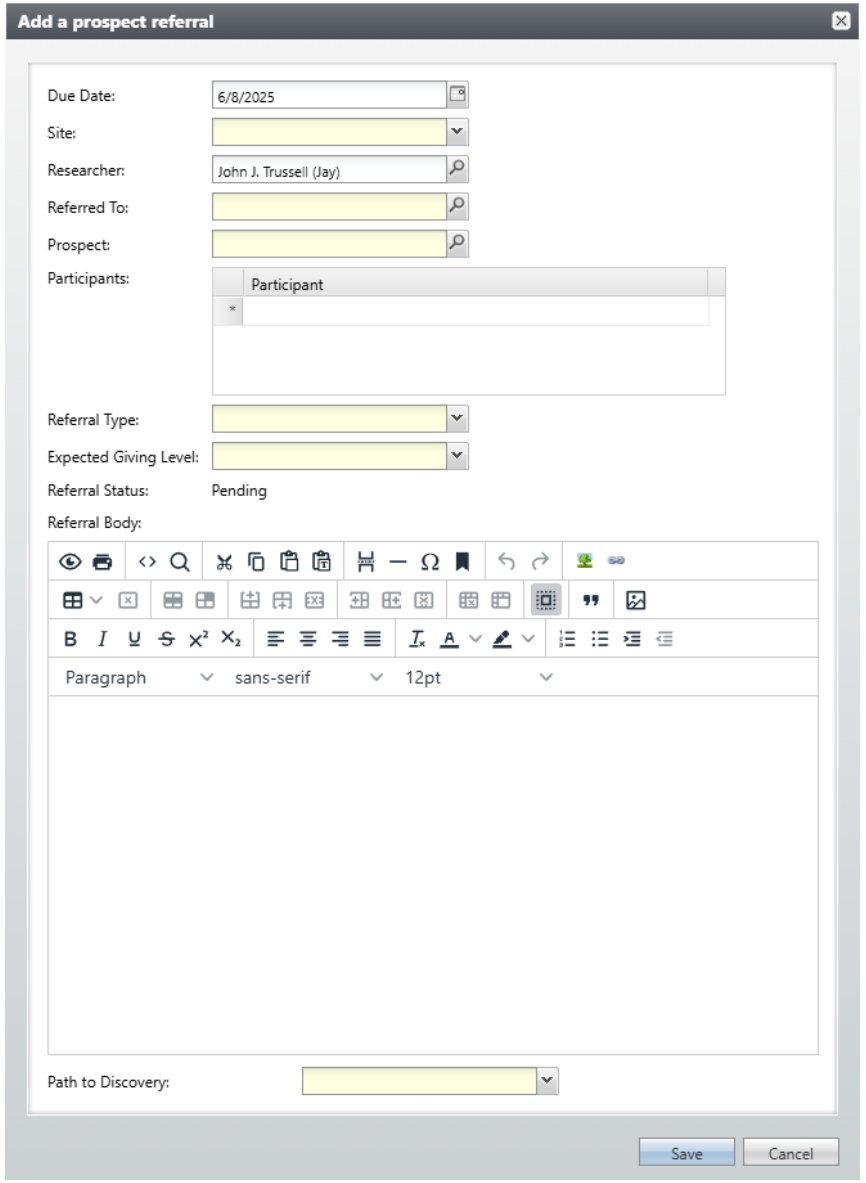
Site: Internal divisions/departments

Participants: Additional development officers who might need to be involved

Referral Type: Direct referral or a referral to a manager to delegate

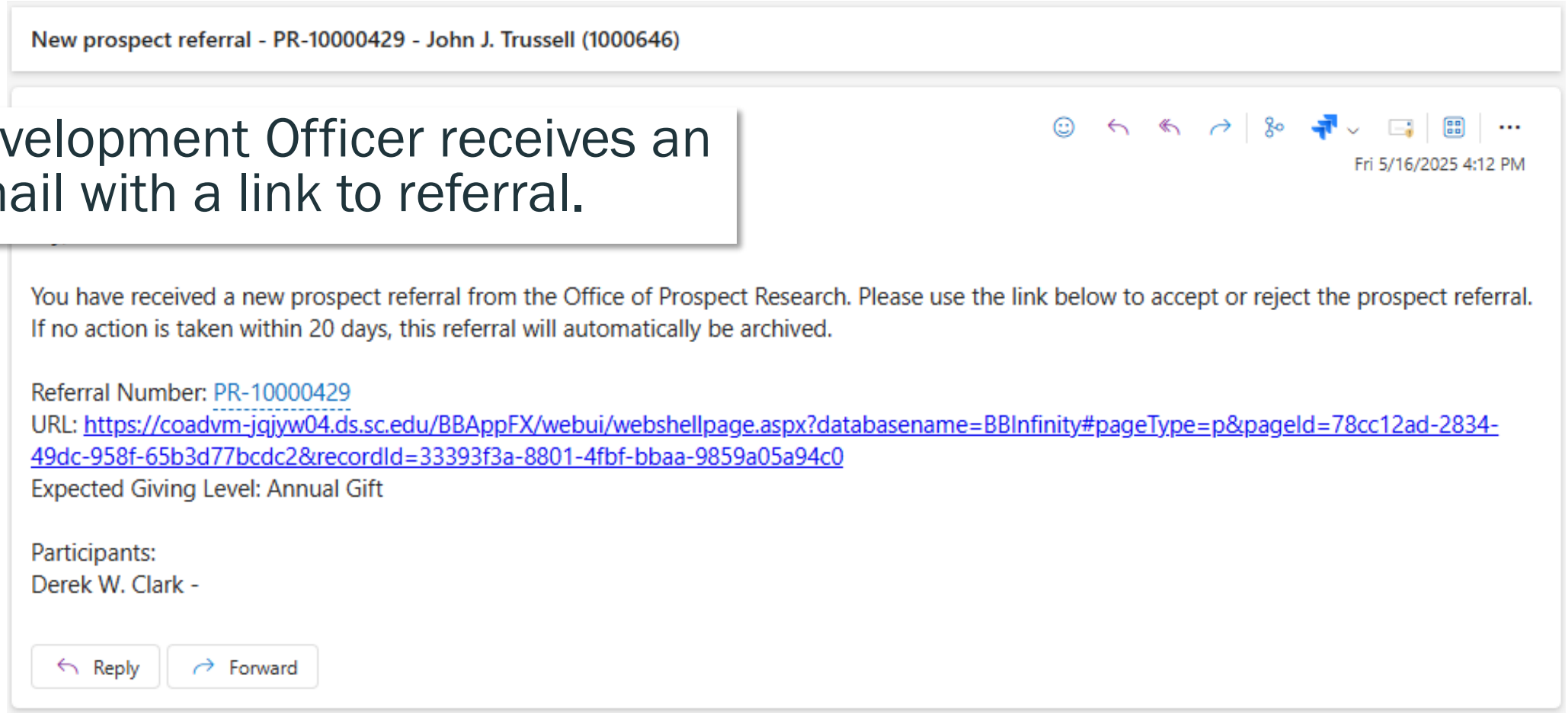
Expected Giving Level: MGP, PGP, etc

Path to Discovery: How did you find this prospect?



STEP 2

Development Officer receives an email with a link to referral.



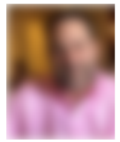
STEP 3

D.O. reviews the referral

Prospect Referral: [redacted]

Referral Information

Referral Number: **PR-10000679**



Address: [redacted]
Fort Mill, SC 29715-5917
United States
Email: [redacted]
Phone: [redacted]

Referred To:	**Mark Richter**	Site:	**Moore School of Business**
Prospect Giving Level:	**Major Gift**		
Researcher:	**Timothy A. Aslinger**	First Reminder Sent:	**No**
Type:	**Referral to Director**	Last Reminder Sent:	**No**
Status Code:	**Pending**	Due Date:	**8/27/2025**
		Status Date:	**8/7/2025**
		Path to Discovery:	**Blue Ridge Data**

This prospect has been referred to Mark Richter based on estimated capacity and fit. Please accept this referral and send any questions to Andrew Aslinger (aslinger@sc.edu).

[redacted] is a highly successful financial professional with a quickly rising trajectory in the food industry. [redacted] holds dual degrees from DMSB. He is mid-career and has two younger sons, one attending Furman. [redacted] should be engaged with DMSB to rekindle his relationship with USC and begin conversations about philanthropic support in the future, as well as providing an in for a potential relationship with [redacted]. [redacted]'s stock ownership is an attractive option for a possible gift.

[redacted] – Q3

CRM ID: 216027

Estimated Total Giving Capacity: $250,000 - $500,000

Total Value of Real Estate: $1,051,880

Compensation: $420,752 (estimate based on real estate)

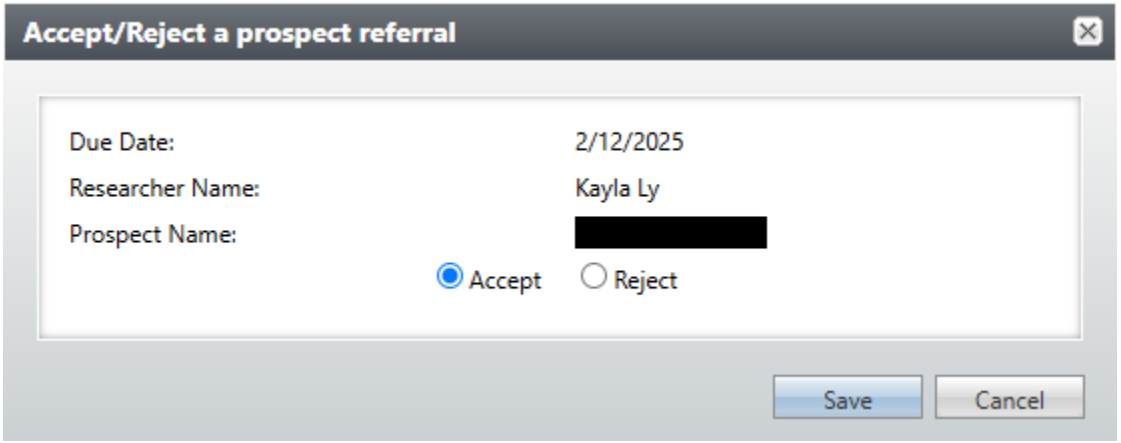
Total Value of Stock: $459,372.76 (as of 7/1/25)

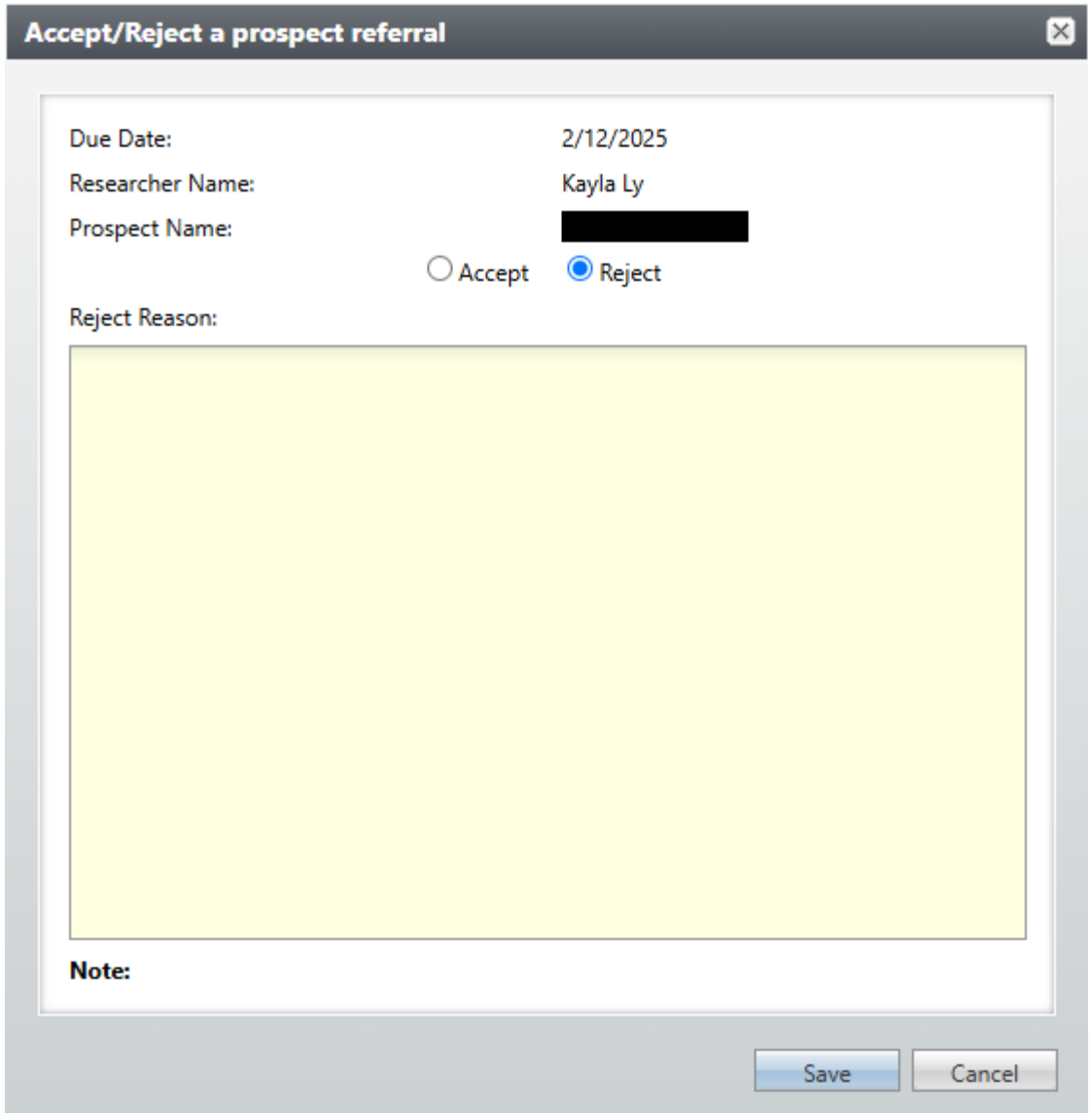
This capacity is based on publicly available financial information and indicates the prospect's ability to give to any charitable organization over a 5-year period.

Primary Residence: Fort Mill, SC

STEP 4

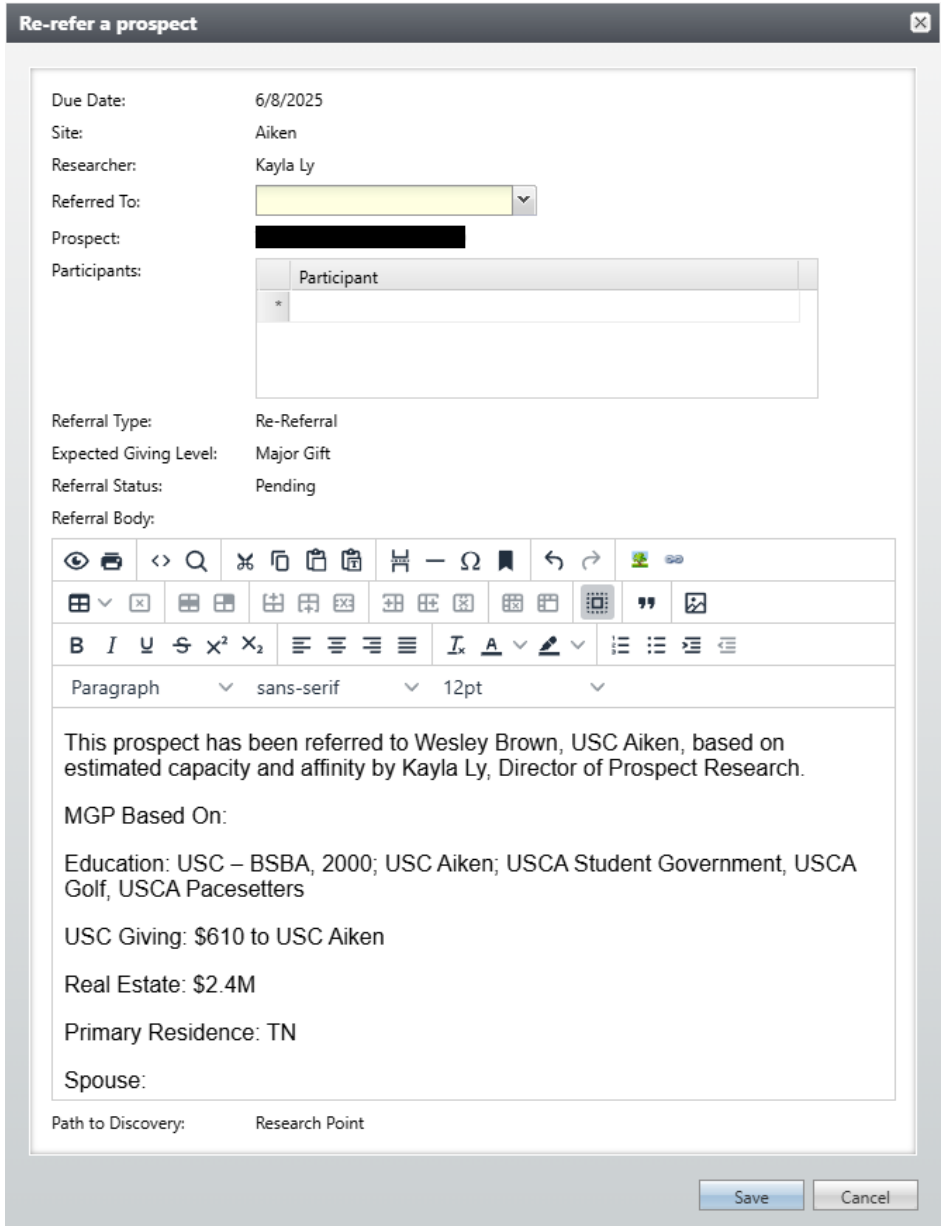
Development Officer Accepts or Rejects the referral





STEP 4A

If the referral is a referral to a director, the director can assign to a subordinate for acceptance/rejections. Subordinate begins at step 2.



STEP 5

If the referral is accepted, notify the prospect strategy team and add the initial outreach plan.

Planned and pending steps (5) Add step | Edit steps | More

Status	Date	Start time	End time	Time zone	Owner	Objective	Stage	Contact method	Has documentation
Pending	3/28/2025				Annastasia Murphy , 2011	RPS Review - 60 Day - Initial Contact	Qualification	Other	
Pending	6/6/2025				Annastasia Murphy , 2011	RPS Review - 130 Day – Progress Check	Qualification	Other	
Pending	6/26/2025				Annastasia Murphy , 2011	Initial Meeting	Qualification	In Person	
Pending	6/26/2025				Teesa J. Brunson (Teesa)	RPS Review - 150 Day - Initial Meeting	Qualification	Other	
Pending	7/6/2025				Teesa J. Brunson (Teesa)	RPS Review - Make Plan Adjustments	Qualification	Other	

Completed steps (1) Add step | More

Status	Date	Start time	End time	Owner	Objective	Stage	Contact method
Completed	1/27/2025			Teesa J. Brunson (Teesa)	Initial Contact-Sent Email for an Introductory Phone Call or Zoom Meeting	Qualification	Email

FUNDRAISER NOTIFICATIONS & RESPONSIBILITIES

- Accept or reject within 20 days
- If accepted, auto-plan begins with deadlines
- Fundraiser + Prospect Strategy checkpoints at 60 and 150 days

USC Prospect Referral Tracking System

MANAGEMENT

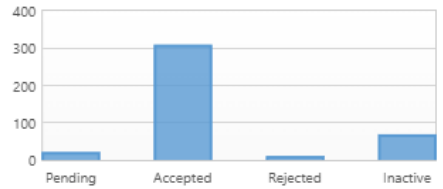
MANAGER OVERVIEW

Prospect Referral Management

Referrals by Status

Site:

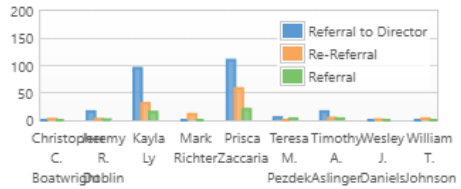
Showing: Prospects sent ever.



Referral Types by Researcher

Researcher:

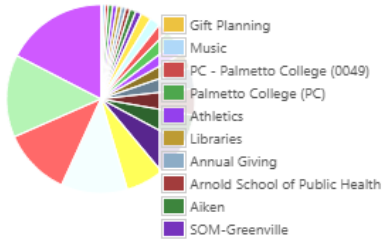
Showing: Prospects sent ever.



Referrals by Site

Site:

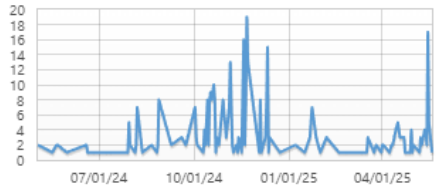
Showing: Prospects sent ever.



Referrals Over Time

Site:

Showing: Prospects sent ever.



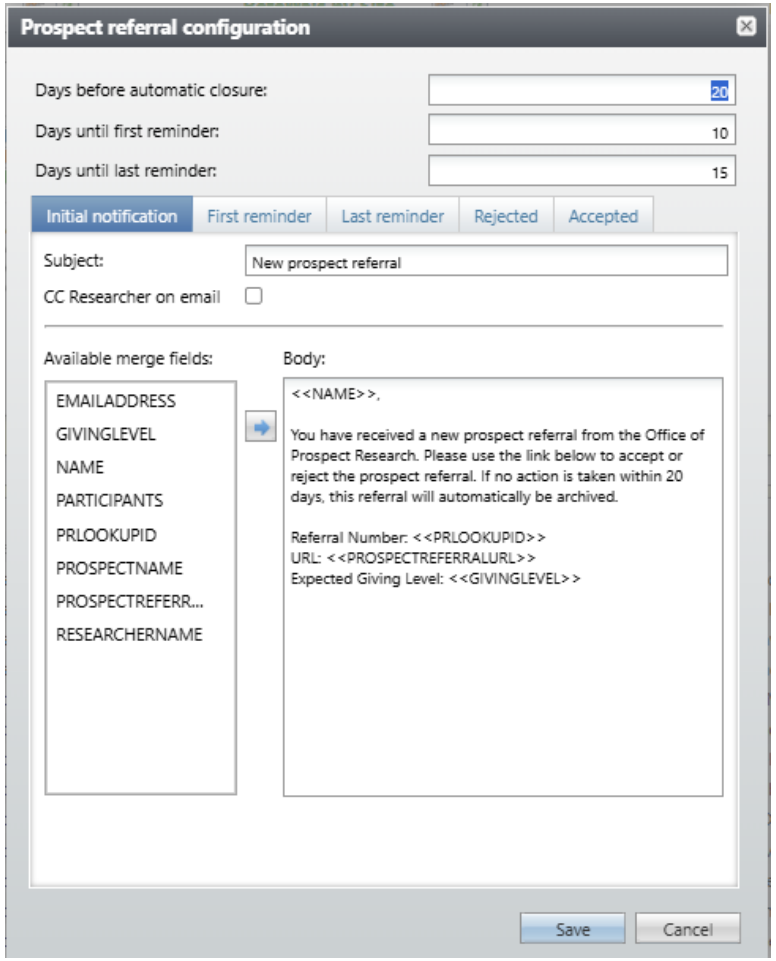
Prospect Referrals (518)

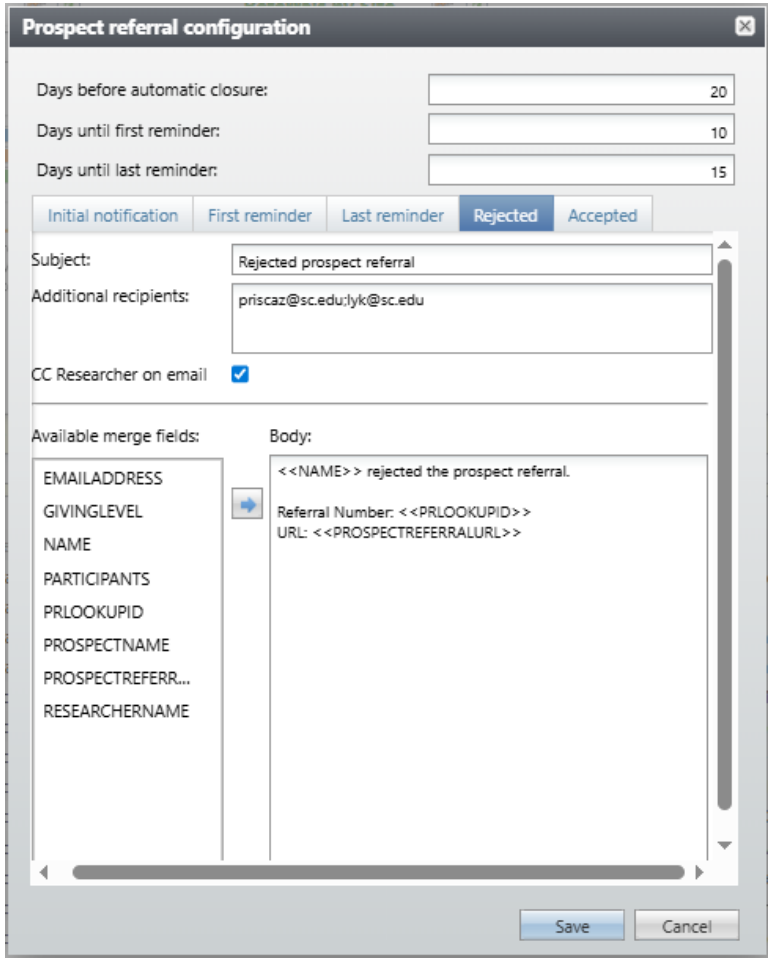
Search | Add Referral | Configuration | Filters | More

< 1 2 3 4 5 ... 18 >

Referral Number	Add Date	Due Date	Referred To	Referred By	Prospect	Referral Type	Referral Status	City	Prospect Level	Site	Prospect Referral ...	Prospect Referral ...	Path to Discovery
PR-10000518	5/19/2025	6/8/2025	Marcus T. Fogle	Jeremy R. Doblin	[redacted]	Referral to Director	Pending	Charlottesville	Principal Gift	Honors College			Visual Analyzer
PR-10000517	5/16/2025	6/5/2025	LaTanza Duncan	Kayla Ly		Referral to Director	Accepted	Rye	Principal Gift	Principal Gifts	✓	ADMN - Prospect ...	Blue Ridge Data
PR-10000516	5/16/2025	6/5/2025	Bryan D. Winters	Kayla Ly		Referral to Director	Accepted	Lexington	Principal Gift	SOM-Columbia	✓	SOMC - Prospect ...	Stock Alerts
PR-10000515	5/16/2025	6/5/2025	Mark Richter	Kayla Ly		Referral to Director	Pending	Greenville	Principal Gift	Moore School of ...			Wealth-X
PR-10000514	5/16/2025	6/5/2025	Geleen M. Reed-T...	Timothy A. Aslinger		Referral to Director	Pending	Marietta	Major Gift	Arts and Sciences			LinkedIn
PR-10000513	5/16/2025	6/5/2025	Katherine E. Seigler	Timothy A. Aslinger		Referral to Director	Pending	Lawrence Township	Major Gift	Information and C...			LinkedIn
PR-10000512	5/15/2025	6/4/2025	Bryan D. Winters	Timothy A. Aslinger		Referral to Director	Accepted	Isle of Palms	Principal Gift	SOM-Columbia	✓	SOMC - Prospect ...	Stock Alerts
PR-10000511	5/15/2025	6/4/2025	Alyssa N. Fencel-...	Prisca Zaccaria		Referral	Accepted	Greenville	Major Gift	SOM-Columbia	✓	SOMC - Prospect ...	News Alerts
PR-10000510	5/15/2025	6/4/2025	Bryan D. Winters	Prisca Zaccaria		Referral to Director	Accepted	Camp Hill	Major Gift	SOM-Columbia	✓	SOMC - Prospect ...	News Alerts
PR-10000509	5/15/2025	6/4/2025	Bryan D. Winters	Prisca Zaccaria		Referral to Director	Accepted	Bloomfield Hills	Major Gift	SOM-Columbia	✓	SOMC - Prospect ...	Blue Ridge Data
PR-10000508	5/15/2025	6/4/2025	Alyssa N. Fencel-...	Prisca Zaccaria		Referral	Accepted	Aventura	Major Gift	SOM-Columbia	✓	SOMC - Prospect ...	Research Point
PR-10000507	5/15/2025	6/4/2025	Alyssa N. Fencel-...	Prisca Zaccaria		Referral	Accepted	Columbia	Major Gift	SOM-Columbia	✓	SOMC - Prospect ...	News Alerts
PR-10000506	5/15/2025	6/4/2025	Bryan D. Winters	Prisca Zaccaria		Referral to Director	Accepted	Snellville	Major Gift	SOM-Columbia	✓	SOMC - Prospect ...	Blue Ridge Data

CONFIGURATION





FUNDRAISER VIEW

Prospect Referrals

Prospect Referrals (99) Filters | More

< 1 2 3 4 >

Referral Number	Add Date	Due Date	Referred To	Referred By	Prospect	Referral Type	Referral Status	City
PR-10000679	8/7/2025	8/27/2025	Mark Richter	Timothy A. Aslinger		Referral to Director	Pending	Fort Mill
PR-10000609	7/14/2025	8/3/2025	Mark Richter	Jeremy R. Doblin		Referral to Director	Accepted	Larkspur
PR-10000590	7/11/2025	7/31/2025	Mark Richter	Jeremy R. Doblin		Referral to Director	Accepted	Fairview
PR-10000586	7/9/2025	7/29/2025	Mark Richter	Timothy A. Aslinger		Referral to Director	Re-Referred - Accepted	Mount Pleasant
PR-10000581	7/8/2025	7/28/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Mount Pleasant
PR-10000582	7/8/2025	7/28/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Charleston
PR-10000583	7/8/2025	7/28/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Rejected	Thomasville
PR-10000584	7/8/2025	7/28/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Columbia
PR-10000575	7/7/2025	7/27/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	West Columbia
PR-10000577	7/7/2025	7/27/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Clinton
PR-10000567	7/1/2025	7/21/2025	Mark Richter	Kayla Ly		Referral to Director	Accepted	Pennington
PR-10000556	6/26/2025	7/16/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Inactive	Charleston
PR-10000560	6/26/2025	7/16/2025	Mark Richter	Timothy A. Aslinger		Referral to Director	Re-Referred - Accepted	Camden
PR-10000541	6/4/2025	6/24/2025	Mark Richter	Jeremy R. Doblin		Referral to Director	Re-Referred - Accepted	Celina
PR-10000534	5/28/2025	6/17/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Novi
PR-10000529	5/24/2025	6/13/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Mount Pleasant
PR-10000515	5/16/2025	6/5/2025	Mark Richter	Kayla Ly		Referral to Director	Re-Referred - Accepted	Greenville
PR-10000496	5/15/2025	6/4/2025	Mark Richter	Teresa M. Pezdek		Referral to Director	Re-Referred - Accepted	Charleston
PR-10000490	5/13/2025	6/2/2025	Mark Richter	Timothy A. Aslinger		Referral to Director	Re-Referred - Accepted	Charlotte
PR-10000476	5/1/2025	5/21/2025	Mark Richter	Timothy A. Aslinger		Referral to Director	Re-Referred - Accepted	Winter Park
PR-10000472	4/29/2025	5/19/2025	Mark Richter	Timothy A. Aslinger		Referral to Director	Re-Referred - Accepted	Orlando
PR-10000437	3/28/2025	4/17/2025	Mark Richter	Jeremy R. Doblin		Referral to Director	Re-Referred - Accepted	Mooresville
PR-10000435	3/26/2025	4/15/2025	Mark Richter	Jeremy R. Doblin		Referral to Director	Re-Referred - Accepted	Spring
PR-10000414	1/24/2025	2/13/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Tampa
PR-10000406	1/22/2025	2/11/2025	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	North Chesterfield
PR-10000316	11/22/2024	12/12/2024	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Edisto Island
PR-10000328	11/22/2024	12/12/2024	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Columbia
PR-10000305	11/21/2024	12/11/2024	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Miami
PR-10000303	11/19/2024	12/9/2024	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Muncie
PR-10000223	11/18/2024	12/8/2024	Mark Richter	Prisca Zaccaria		Referral to Director	Re-Referred - Accepted	Delray Beach

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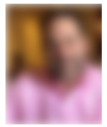
FUNDRAISER VIEW

Prospect Referral: [redacted]

Referral Information

Referral Number: **PR-10000679**



[redacted]

Address:
[redacted]
Fort Mill, SC 29715-5917
United States
Email: [redacted]
Phone: [redacted]

Referred To:	**Mark Richter**	Site:	**Moore School of Business**
Prospect Giving Level:	**Major Gift**		
Researcher:	**Timothy A. Aslinger**	First Reminder Sent:	**No**
Type:	**Referral to Director**	Last Reminder Sent:	**No**
Status Code:	**Pending**	Due Date:	**8/27/2025**
		Status Date:	**8/7/2025**
		Path to Discovery:	**Blue Ridge Data**

This prospect has been referred to Mark Richter based on estimated capacity and fit. Please accept this referral and send any questions to Andrew Aslinger (aslinger@sc.edu).

[redacted] is a highly successful financial professional with a quickly rising trajectory in the food industry. [redacted] holds dual degrees from DMSB. He is mid-career and has two younger sons, one attending Furman. [redacted] should be engaged with DMSB to rekindle his relationship with USC and begin conversations about philanthropic support in the future, as well as providing an in for a potential relationship with [redacted]'s stock ownership is an attractive option for a possible gift.

[redacted] – Q3

CRM ID: 216027

Estimated Total Giving Capacity: $250,000 - $500,000
Total Value of Real Estate: $1,051,880
Compensation: $420,752 (estimate based on real estate)
Total Value of Stock: $459,372.76 (as of 7/1/25)
This capacity is based on publicly available financial information and indicates the prospect's ability to give to any charitable organization over a 5-year period.

Primary Residence: Fort Mill, SC

USC Prospect Referral Tracking System

OUTCOMES

EXPLORE

PD25

New Depths

WHERE ARE THEY NOW? – PIPELINE STATUS OF REFERRALS

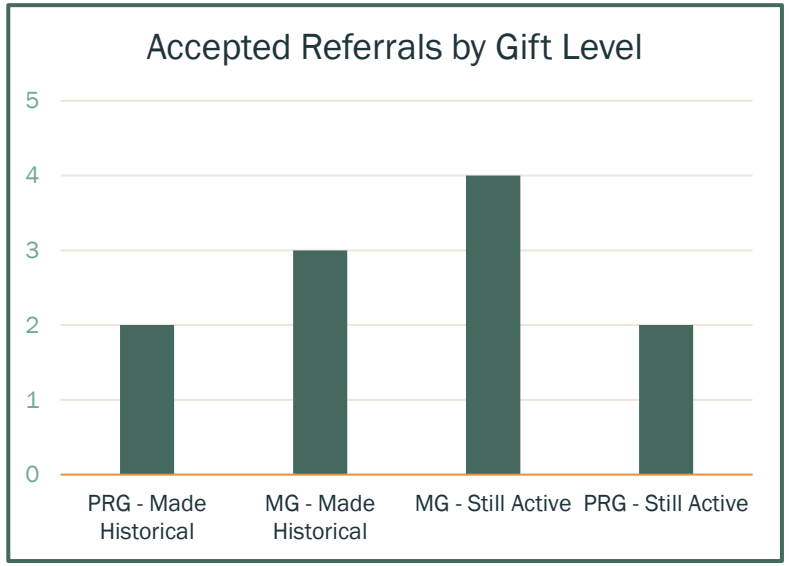
FY 2025

- 533 Referrals Sent (344 Prospects)
- 403 Referrals Accepted or Re-Referred (75%)
  - 314 Prospect (91%)
- 102 Phone Calls, 600+ emails
- 61 First Meetings
- 7 Prospects in Solicitation Stage
- 4 Gifts totaling $141,500 in Pending response

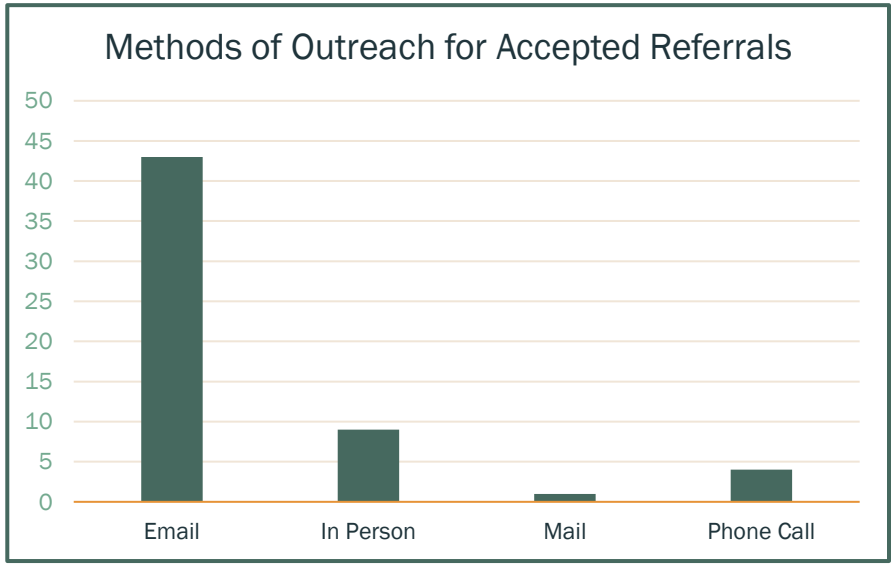
Key takeaway: *Referral ≠ success without accountability & follow-through*

OUTCOME REPORTING BY FUNDRAISER

Metric	Count
Total Referrals Accepted	12
Principal Gift Referrals	4
Major Gift Referrals	7
Referrals with Qualification Plan	7
Referrals Made Historical	6
Total Outreach Attempts	57
Email Outreach	43
In-Person Meetings	9
Phone Calls	4
Mail	1
Made Historical Due to Inactivity	6



Gifts	Revenue
4	$6,550.00



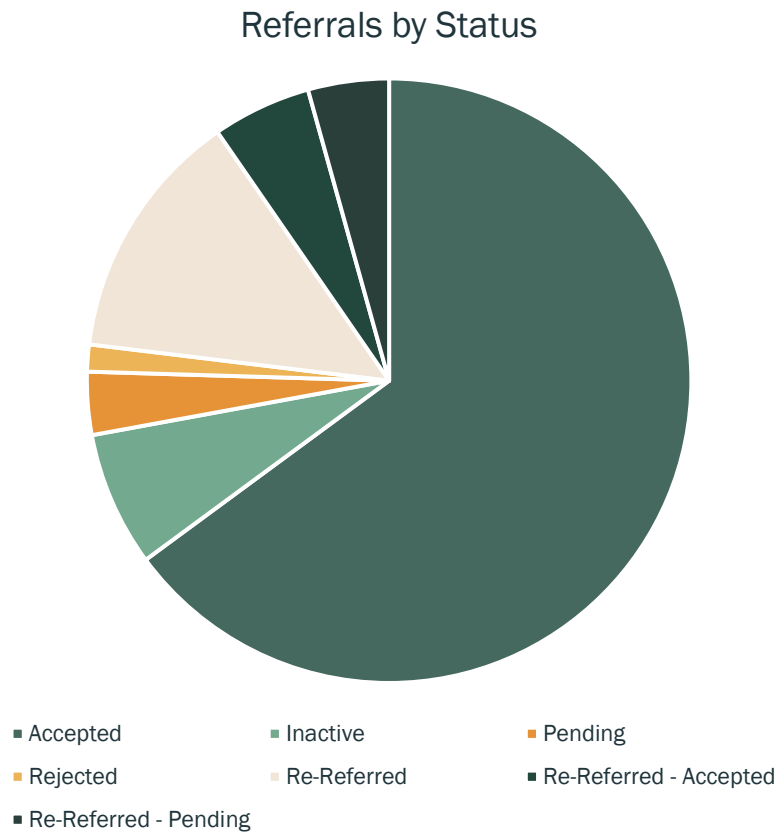
*Mockup of report

OUTCOME REPORTING BY RESEARCHER

Referral Outcomes by Researcher - Kayla Ly

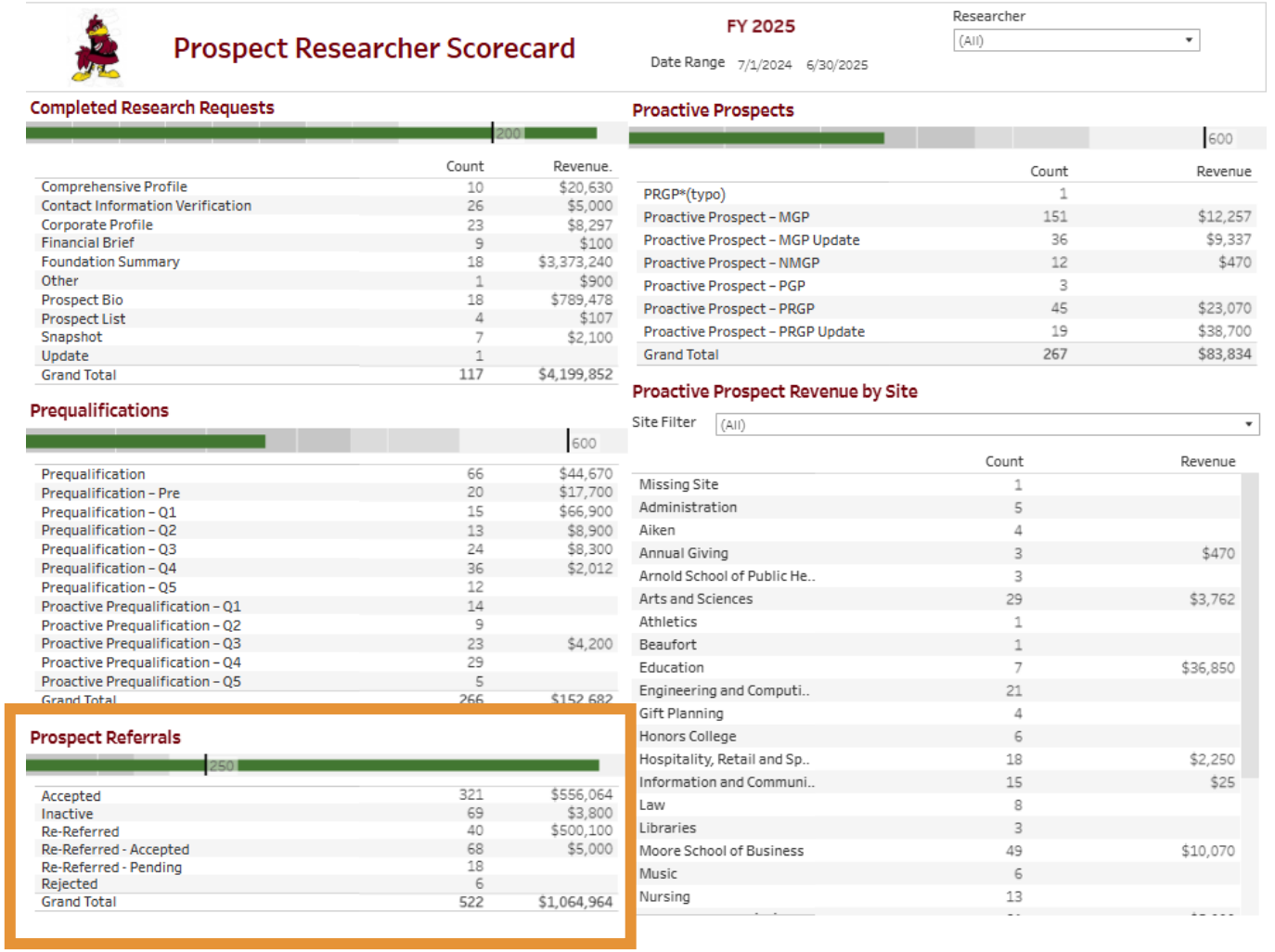
	Expected Giving Capacity			
Status	Corporate/Foundation Gift	Major Gift	Principal Gift	Grand Total
Accepted		75	59	135
Inactive		5	10	15
Pending	6		1	7
Rejected		1	2	3
Re-Referred	1	17	10	28
Re-Referred - Accepted		9	2	11
Re-Referred - Pending		3	6	9

Gifts From Referrals	
Count of Gifts	Total Gifts
13	$510,665.00



*Mockup of report

PROSPECT RESEARCHER SCORECARD



Prospect Researcher Scorecard

FY 2025

Date Range 7/1/2024 6/30/2025

Researcher: (All)

Completed Research Requests

200

	Count	Revenue.
Comprehensive Profile	10	$20,630
Contact Information Verification	26	$5,000
Corporate Profile	23	$8,297
Financial Brief	9	$100
Foundation Summary	18	$3,373,240
Other	1	$900
Prospect Bio	18	$789,478
Prospect List	4	$107
Snapshot	7	$2,100
Update	1	
Grand Total	117	$4,199,852

Prequalifications

600

Prequalification	66	$44,670
Prequalification – Pre	20	$17,700
Prequalification – Q1	15	$66,900
Prequalification – Q2	13	$8,900
Prequalification – Q3	24	$8,300
Prequalification – Q4	36	$2,012
Prequalification – Q5	12	
Proactive Prequalification – Q1	14	
Proactive Prequalification – Q2	9	
Proactive Prequalification – Q3	23	$4,200
Proactive Prequalification – Q4	29	
Proactive Prequalification – Q5	5	
Grand Total	266	$152,682

Prospect Referrals

250

Accepted	321	$556,064
Inactive	69	$3,800
Re-Referred	40	$500,100
Re-Referred - Accepted	68	$5,000
Re-Referred - Pending	18	
Rejected	6	
Grand Total	522	$1,064,964

Proactive Prospects

600

	Count	Revenue
PRGP*(typo)	1	
Proactive Prospect – MGP	151	$12,257
Proactive Prospect – MGP Update	36	$9,337
Proactive Prospect – NMGP	12	$470
Proactive Prospect – PGP	3	
Proactive Prospect – PRGP	45	$23,070
Proactive Prospect – PRGP Update	19	$38,700
Grand Total	267	$83,834

Proactive Prospect Revenue by Site

Site Filter: (All)

	Count	Revenue
Missing Site	1	
Administration	5	
Aiken	4	
Annual Giving	3	$470
Arnold School of Public He..	3	
Arts and Sciences	29	$3,762
Athletics	1	
Beaufort	1	
Education	7	$36,850
Engineering and Computi..	21	
Gift Planning	4	
Honors College	6	
Hospitality, Retail and Sp..	18	$2,250
Information and Communi..	15	$25
Law	8	
Libraries	3	
Moore School of Business	49	$10,070
Music	6	
Nursing	13	

TRACKING REFERRALS TO GIFTS

Qualified

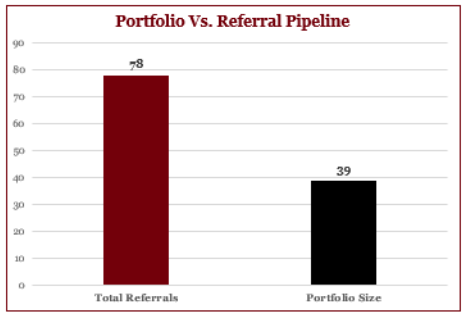
Defined as Plan Status != "Qualification" OR Opportunity Status = Qualified or further.

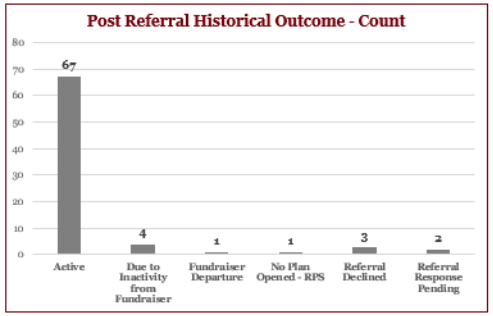
Referral Status	Referrals	Has a Plan	Qualified	ExpectedAmount	Ask Amount	Sum of Accepted Amount	Revenue Amount
Accepted	155	140	3	$90,000	$90,000	$0	
Historical	151	150	0				
Inactive	64	1	0				
Pending	4	0	0				
Re-Referred	4	4	0				
Re-Referred - Accepted	26	23	1	$10,000	$10,000	$0	
Re-Referred - Pending	11	1	0				
Rejected	7	0	0				
Grand Total	422	318	4	$100,000	$100,000	$0	

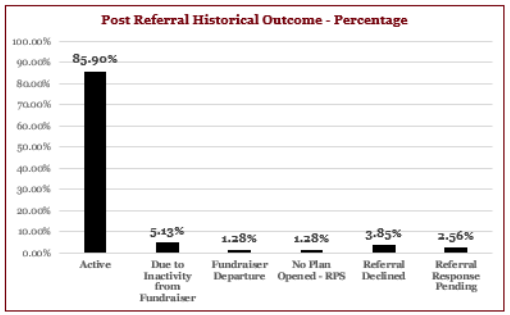
REFERRAL ANALYSIS – TEAM LEADS

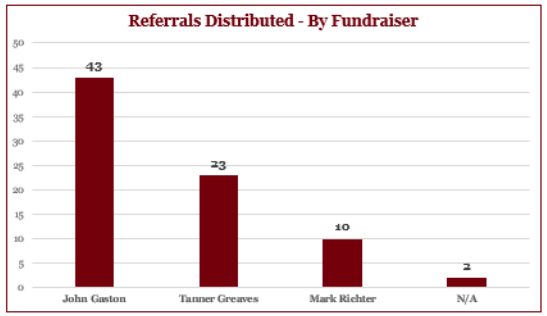
UNIVERSITY OF South Carolina

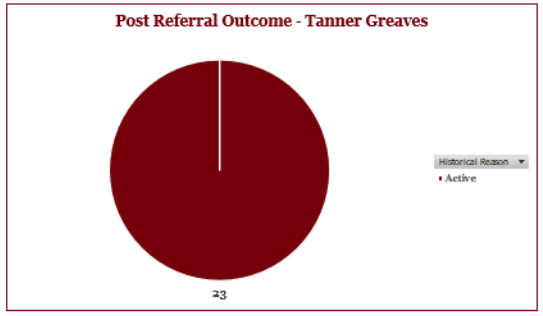
Mark Richter - Portolio and Referral Analysis

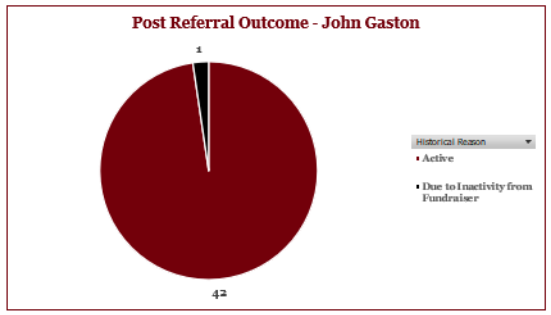


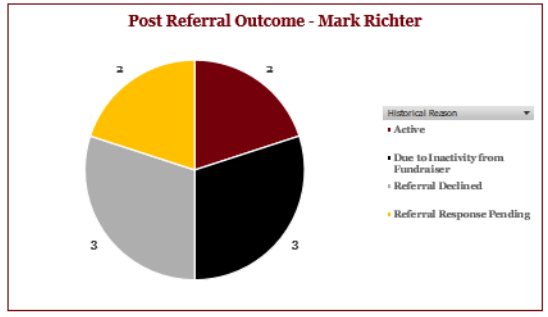












- Outcomes by count and percentages
- Referrals redistributed to team members
- Redistributed referral outcome by team member

REFERRAL ANALYSIS – INDIVIDUAL

Mark Richter - Portolio and Referral Analysis

Total Referrals	Portfolio Size
78	39

Historical Reason	Count	Percentage
Active	72	92.31%
Due to Inactivity from Fundraiser	4	5.13%
Fundraiser Departure	1	1.28%
Declined	1	1.28%
Grand Total	78	100.00%

Fundraiser	Count	Percentage
John Gaston	42	53.85%
Tanner Greaves	23	29.49%
(blank)	3	3.85%
Mark Richter	9	11.54%
Fundraiser Departure	1	1.28%
Grand Total	78	100.00%

Post Re-Referral Outcome	John Gaston		Tanner Greaves		(blank)		Mark Richter		Fundraiser Departure	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Active	41	51.25%	23	28.75%	1	1.25%	4	5.00%		0.00%
Due to Inactivity from Fundraise	1	1.25%		0.00%		0.00%	3	3.75%		0.00%
Fundraiser Departure		0.00%		0.00%		0.00%		0.00%	1	1.25%
No Plan Opened - RPS		0.00%		0.00%	1	1.25%		0.00%		0.00%
Referral Declined		0.00%		0.00%	1	1.25%	2	2.50%		0.00%
Referral Response Pending		0.00%		0.00%		0.00%	2	2.50%		0.00%
Grand Total	42	52.50%	23	28.75%	3	3.75%	11	13.75%	1	1.25%

Number of Contact Attempts	Count	Percentage
0	77	98.72%
1	1	1.28%
Grand Total	78	100.00%

Acceptance Rate	Type	Referrals	% of Referrals	Attempted to Contact	% Attempted to Contact	Linked Plan	% with Plan	Qualified	% Qualified	Made Historical	% Made Historical
Accepted	Referral to Director	6	7.6%	1	16.7%	6	100.00%	0	0.0%	3	50.00%
	Total	6	7.1%	1	16.7%	6	100.00%	0	0.0%	3	50.00%
Inactive	Referral to Director	4	5.1%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Re-Referral	5	100.0%	0	0.0%	1	20.00%	0	0.0%	1	20.00%
	Total	9	10.7%	0	0.0%	1	11.11%	0	0.0%	1	11.11%
Pending	Referral to Director	1	1.3%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Total	1	1.2%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Re-Referred	Referral to Director	12	15.2%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Total	12	14.3%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Re-Referred - Accepted	Referral to Director	53	67.1%	0	0.0%	1	1.89%	0	0.0%	1	1.89%
	Total	53	63.1%	0	0.0%	1	1.89%	0	0.0%	1	1.89%
Rejected	Referral to Director	3	3.8%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Total	3	3.6%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Grand Total		84	100.0%	1	1.2%	8	9.52%	0	0.0%	5	5.95%

Post Re-Referral Outcome	Count	Percentage
Active	69	86.25%
Due to Inactivity from Fundraiser	4	5.00%
Fundraiser Departure	1	1.25%
No Plan Opened - RPS	1	1.25%
Referral Declined	3	3.75%
Referral Response Pending	2	2.50%
Grand Total	80	100.00%

Post Acceptance Analysis | Acceptance Rate - M. Richter | Qualified - M. Richter | Portfolio | Active Referrals-M.Richter | Historical Referrals-M.Richter

PENDING REFERRALS FOR FUNDRAISER

Chance to remind the development officer about pending referrals, and discuss any questions/concerns they might have

Lookup ID	Prospect Name	Fundraiser	Site Code	Type	Added Date	Days Since Referral	Status	Status Date	Days in Status	Due Date
3151	[redacted]	Mark Richter	DMSB	Referral to Director	07/11/2025	28	Pending	07/15/2025	24	07/31/2025
216027		Mark Richter	DMSB	Referral to Director	08/07/2025	1	Pending	08/07/2025	1	08/27/2025
338070		Mark Richter	DMSB	Referral to Director	07/14/2025	25	Pending	07/16/2025	23	08/03/2025
3151		Mark Richter	DMSB	Referral to Director	7/15/2025	16	Pending	7/16/2025	15	9/14/2025

OUTCOMES FOR INDIVIDUAL FUNDRAISERS

Status	Type	Referrals	% of Referrals	Attempted to Contact	% Attempted to Contact	Linked Plan	% with Plan	Qualified	% Qualified	Made Historical	% Made Historical
Accepted	Referral to Director	6	7.6%	1	16.7%	6	100.00%	0	0.0%	3	50.00%
Inactive	Referral to Director	4	5.1%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Re-Referral	5	100.0%	0	0.0%	1	20.00%	0	0.0%	1	20.00%
Pending	Referral to Director	1	1.3%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Re-Referred	Referral to Director	12	15.2%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Re-Referred - Accepted	Referral to Director	53	67.1%	0	0.0%	1	1.89%	0	0.0%	1	1.89%
Rejected	Referral to Director	3	3.8%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Grand Total		**84**	**100.0%**	**1**	**1.2%**	**8**	**9.52%**	**0**	**0.0%**	**5**	**5.95%**

REJECTED REFERRALS

Added Date	Days Since Referral	Status	Status Date	Days in Status	Due Date	Historical Reason	Total Contacts	Email	Notes	Referred Fundraiser	Post Re-Referral Outcome
10/18/2024	294	Inactive	11/07/2024	274	11/07/2024	Active	0		Never received for a plan		No Plan Opened - RPS
07/01/2025	38	Accepted	07/09/2025	30	07/21/2025	Active	1		Referral sent July 2025, no current outreact attempt; within 150 days		Active
07/11/2025	28	Accepted	07/15/2025	24	07/31/2025	Active	0		Referral sent July 2025, no current outreact attempt; within 150 days		Active
10/31/2024	281	Rejected	11/11/2024	270	11/20/2024	Active	0		Referral declined		Referral Declined
08/07/2025	1	Pending	08/07/2025	1	08/27/2025	Active	0		Referral Sent 8/7 - no response		Referral Response Pending
07/08/2025	31	Rejected	07/16/2025	23	07/28/2025	Active	0		Referral declined		Referral Declined
10/21/2024	291	Rejected	11/06/2024	275	11/10/2024	Active	0		Referral declined		Referral Declined
07/14/2025	25	Pending	07/16/2025	23	08/03/2025	Active	0		Referral pending response		Referral Response Pending
7/9/2025	33	Accepted	7/13/2025	29	12/11/2025	Active	1		Mark has made outreach July 2025; within 150 days.		Active
7/15/2025	16	Accepted	7/16/2025	15	9/14/2025	Active	0		Referral sent July 2025, no current outreact attempt; within 150 days		Active

REFERRALS OUTCOMES – QUALIFED?

Referral Status	Referrals	Has a Plan	Qualified
Accepted	5	3	0
Historical	10	5	0
Inactive	4	0	0
Pending	1	0	0
Re-Referred	10	0	0
Re-Referred - Accepted	51	0	0
Rejected	3	0	0
Grand Total	84	8	0

REAL-WORLD CULTURE SHIFT

- Moving from “hand-off and hope” to active, visible follow-through
- Normalizing transparency around who acts on referrals and who doesn’t
- Shifting fundraiser perception of referrals from “extra work” to “qualified opportunities”
- Building trust between Research, Strategy, and frontline teams through shared data

CHALLENGES AND LESSONS LEARNED

- **Early resistance:** “I already know my prospects” mindset
- Getting consistent **buy-in** on referral acceptance and documentation
- Balancing **accountability with relationship-building** — avoiding a “gotcha” culture
- The need for **ongoing training and reminders** to keep processes consistent
- **Tech hiccups:** integrating automation without adding extra clicks

PRACTICAL TAKEAWAYS

- Start with clear definitions for referral stages and outcomes
- Use data to tell the story — wins, trends, and gaps resonate more than opinions
- Keep leadership engaged; their endorsement drives adoption
- Build in flexibility for re-referral and re-engagement opportunities
- Celebrate successes to reinforce the value of the system

USC Prospect Referral Tracking System

QUESTIONS?

CONTACT

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University of South Carolina
jay.trussell@sc.edu

THANK YOU!

Please complete your session evaluations in the mobile app.