



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

FROM SOLO TO DUO: DESIGNING AND SCALING AN EFFECTIVE PROSPECT MANAGEMENT SYSTEM FOR A GROWING TEAM

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

IF YOU ONLY REMEMBER THREE THINGS...



Simplicity



Documentation



Communication

OBJECTIVES

You will be able to:



Describe an effective prospect management system with discreet elements that can be easily deployed and delegated



Write a transition plan for adding a prospect development team member.

ABOUT ME

Don Irwin

Sr. Manager of Development Data and
Research at Lutheran Social Service of
Minnesota

Husband

Father of two girls

Fundraising family

Former academic and proud PhD dropout

Daily: work in my home office, do house
projects, play with the kids, do the dishes



ABOUT LSS



- Vision: All people have the opportunity to live and work in community with full and abundant lives.
- Statewide social service provider with 2,500 employees, 10,000 volunteers, and 12,500 supporters
- Services for individuals and families; employment, financial, and legal services, caregiver and companion services; disability, nutrition, youth and young adult, refugee, foster care and adoption, and more.
- \$200M+ annual budget
- Fundraising team of 35+ and growing



PART ONE

BUILDING A FOUNDATION

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DEFINE YOUR CORE COMPONENTS

1. Data
2. Portfolios
3. Opportunities
4. Portfolio Workshops
5. Reports and Dashboards





Prospect
Manager

Database
Manager

Leadership

Operations
Manager

Gift Officer
Supervisor

Gift Officers

PROSPECT MANAGEMENT SYSTEM OUTLINE

Portfolios

- Discovery, qualified, disqualified
- Tiers: 1, 2, 3, community partner, permanent stewardship, grants partnerships
- Ratings: wealth, capacity, likelihood
- Contact reports

Opportunities

- Ask amount, date, designation
- Open, ready to ask, pending, committed, funded, declined, unresponsive, withdrawn

Monthly Portfolio Workshops

- Adding and removing prospects
- Tiers: 1, 2, 3, community partner, permanent stewardship, grants partnerships
- Information updates and research requests

Dashboards

- Significant actions
- Activity summaries
- Portfolio summaries
- Opportunity summaries
- Fundraising progress



PORTFOLIOS

- 100-150 donors assigned
 - Expectations for gift officers
- Each donor has:
 - Prospect status
 - Prospect tier
 - Wealth rating
 - Active opportunity/proposal

WHAT'S IN AN OPPORTUNITY?

- Ask amount
- Designation
- Timeline
- *That's it!*

(okay, there is more, but those are the basics)

Right: a new proposal entry in Raiser's Edge NXT

Add opportunity for Don Irwin

Basic information

Purpose *

Name *

Status

Deadline

mm/dd/yyyy

Funding

Ask date

mm/dd/yyyy

Expected date

mm/dd/yyyy

Funded date

mm/dd/yyyy

Ask amount

\$0.00

Expected amount

\$0.00

Funded amount

\$0.00

Assign to

Fundraiser

Search for a fundraiser

Me

Details

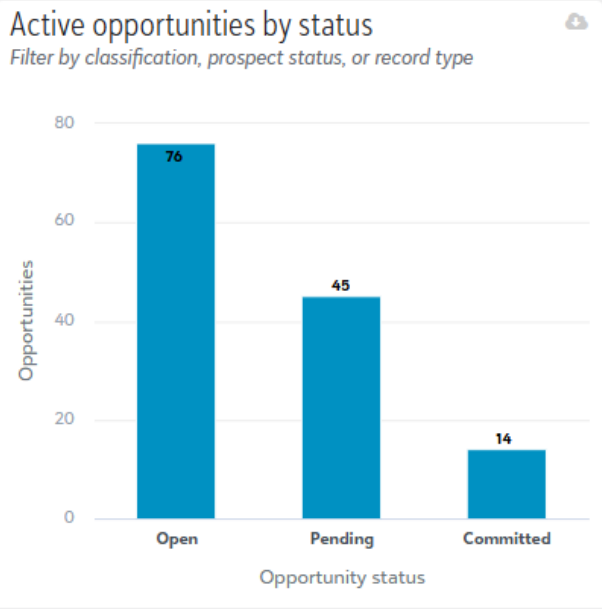
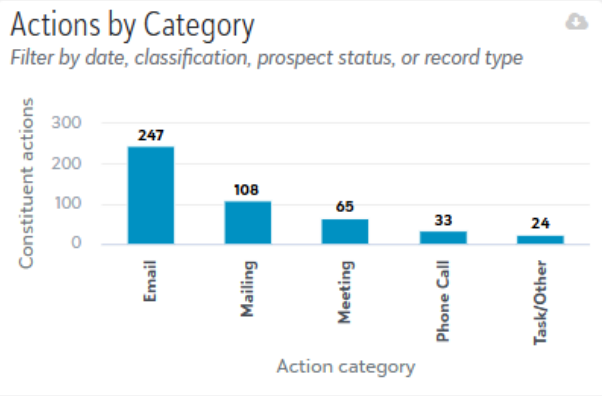
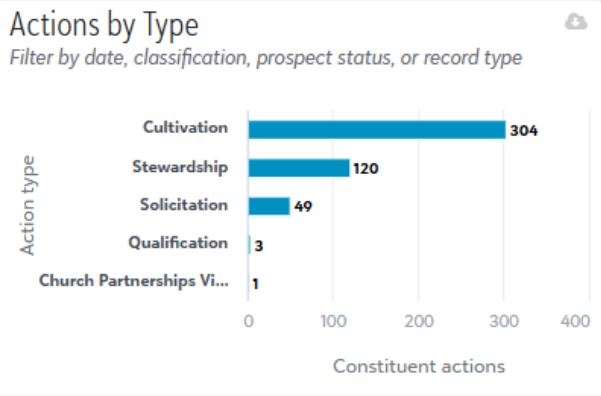
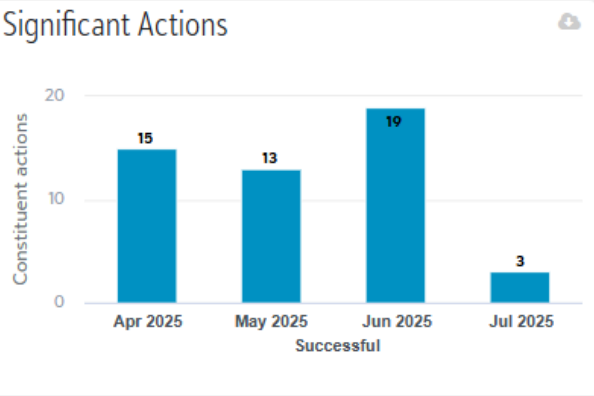
Save Cancel

MONTHLY PORTFOLIO MEETINGS

- qualifying prospects
- opportunities and strategies
- disqualifying prospects and lapsed donors
- significant actions
- dashboards
- data updates
- process management

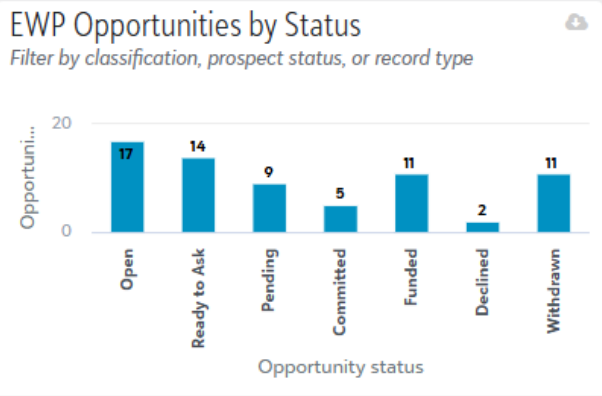
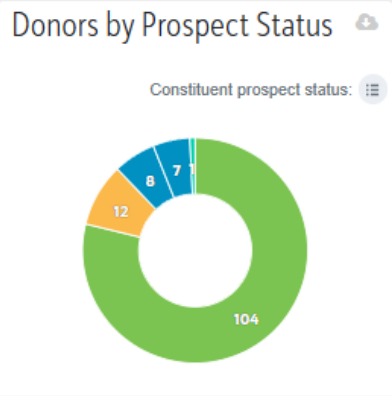


DASHBOARDS



Donors by Tier

Tier ▼	Assigned Donors	Active Opportunities	Actions Last Month	Actions This Month
(empty value)	9	4	17	4
1	29	34	46	11
2	66	81	89	22
3	25	27	27	5
Community Partner	1	1	5	1
Direct Mail	0	2	9	1
Permanent Stewardship	2	1	1	0



PART TWO

MAKING IT TRANSFERABLE

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DOCUMENTATION

- Policies
 - Required, approved by leadership
- Standard Operation Procedures
 - High-level instructions
- Other Documents
 - Guidelines and cheat sheets
 - Keystroke instructions
 - Training videos (2 to 7 minutes long)

Information Update and Research Requests in RE NXT



Information Updates:

- Managed by the Database Team
- Used for **adding** information to constituent records, like contact information or relationships.
- Also used for notifying the Database Team of an anticipated gift from the donor.

How to submit an Information Update:

- 1) Open the constituent record that needs to be updated.
- 2) Click **Add Action**
- 3) Under **Category**, select **Task**
- 4) Under **Type**, select **Information Update**
- 5) In the **Summary**, briefly state what is being updated.
 - a. For example, "New Address," or "Gift Expected"
- 6) In the **Notes**, include all information that needs to be updated, and any additional context.
- 7) Under **Status**, select **Pending**
- 8) Click **Save**.

Edit action for Don Irwin

Category *
Meeting Phone call Email Mail **Task**

Type *
Information Update

Priority
! ↓

Date *
02/18/2021

Start time
End time

Summary
New address

Notes
123 Fake St.
Nowhere, MN 12345

Download appointment as file

Status *
Pending

Additional details
Assign to
Search for a fundraiser
Me

Save Cancel

Information Update and Research Requests in RE NXT



Research Requests:

- Monitored by the Manager of Prospect Strategy
- Primarily for **requesting** research-related information

How to submit a Research Request:

- 1) Open the constituent record.
- 2) Click **Add Action**
- 3) Under **Category**, select **Task**
- 4) Under **Type**, select **Research Request**
- 5) In the **Summary**, briefly state what is being requested.
 - a. For example, "Wealth Rating," or "Research Profile"
- 6) In the **Notes**, include, and any additional context.
- 7) Under **Status**, select **Pending**
- 8) Click **Save**.

Edit action for Don Irwin

Category *
Meeting Phone call Email Mail **Task**

Type *
Research Request

Priority
! ↓

Date *
02/18/2021

Start time
End time

Summary
Research

Notes
Research request details including date needed by

Download appointment as file

Status *
Pending

Additional details
Assign to
Search for a fundraiser
Me

Save Cancel



Sample
instructions for
submitting
database
information
updates and
research requests

PART THREE

HIRING AND TRAINING

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RESUME

Street Name, 1
78900 City, Name
Tel: +900 5555555
E-Mail: emailname@server

SUMMARY

- Experience in commercial engine development
- Expert knowledge in programming
- Strong experience in software performance optimization
- 10 years of development experience
- Management of a small team of engineers and on projects in various industries

WORK EXPERIENCE

07/2017 - Present Company Name (Lead Position Name)
Working on new projects and on projects in various industries

- Set led in
- Suspended
- Develop and launch
- Integer and launch
- Measure and launch
- Diagnose
- Align and launch

01/2015 - 07/2017 Company Name (Position Name)
Working on new projects and on projects in various industries

- Fully responsible for engine development
- Suspension development and launch
- Suspension development and launch
- Fully responsible for engine development

ACADEMIC QUALIFICATIONS

2007 - present High School University
Post graduate studies High School University
2004 - 2005 High School University
Master's degree in Computer Science

HIRING FOR THE RIGHT FIT

You are looking for:

- Another builder, like you!
- Curiosity and tenacity
- Strong communication skills
- Imagination
- Growth mindset

HIRING FOR THE RIGHT FIT



Prospect Research



Relationship Management



Data Science



Leadership

TRAINING THAT STICKS



Timeframe	Focus	Example Activities
30 Days	Learn	Shadow meetings, review SOPs, intro to CRM
60 Days	Practice	Run a portfolio review, enter opportunities, draft a profile
90 Days	Own	Take over a process (e.g., research queue), lead a meeting

PART FOUR

GROWTH AND OPTIMIZATION

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SCALING WITH INTENTION

As your team grows:

- Define roles clearly (e.g., research vs. data vs. strategy)
- Avoid duplication and silos
- Encourage direct collaboration with other staff
- Relinquish control of the systems you designed
- Revisit system definitions and processes – solicit input and share ownership
- Build a culture of shared learning and continuous improvement

KEY LEARNINGS

1. Connect your work to team/organizational goals.
2. Critical: ask the right questions, work toward a vision, and galvanize support for system.
3. Continue to develop good communication and clarity.

KEY LEARNINGS

4. Definitions more important than labels.
5. Processes are more important than tools.
6. Establish a pro-data culture! The entire team needs to be on board with recording and reporting.

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Documentation



Communication

QUESTIONS

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THANK YOU!

Please complete your session
evaluations in the mobile app.

