



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



# FROM STAGNANT TO STRATEGIC

Transforming Portfolio Management in Small Shops

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

# TODAY'S AGENDA

The Current Climate

Defining Success

Breaking it Down

Right Sizing Portfolios

Measuring Success

## OBJECTIVES

Understand Moves Management

Define Key Performance Indicators



# ABOUT ME



Liz Hallett Mills

Director of Prospect Research and  
Portfolio Management at Roanoke College

Mom

DIY-er

Musical Theater Nerd

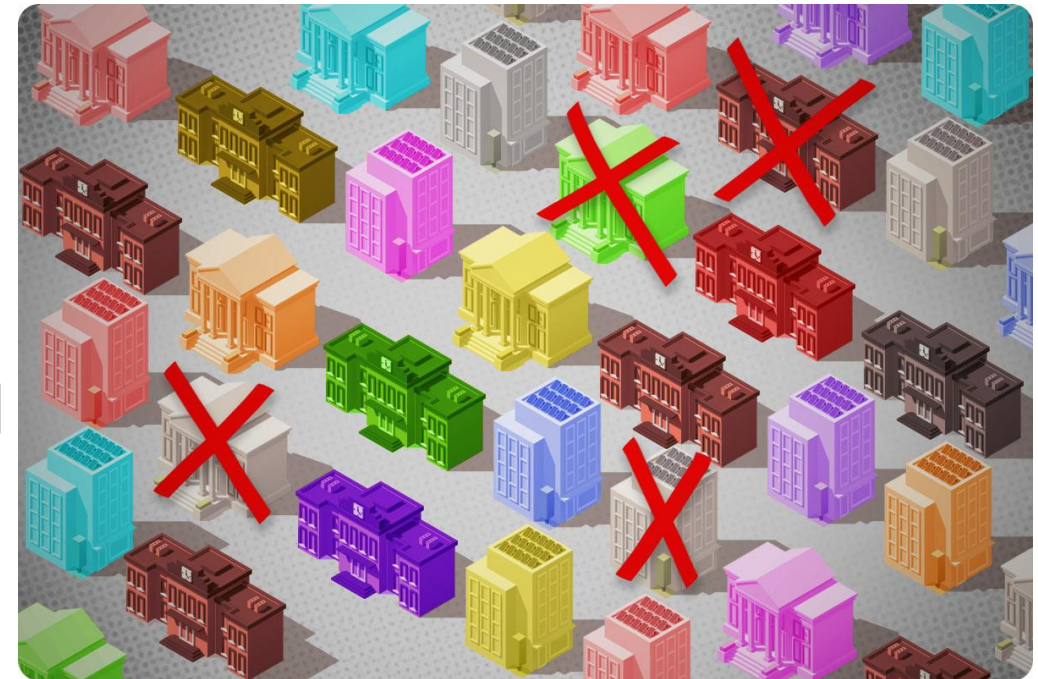
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# WHERE WE ARE NOW...

Since 2020, roughly 80 institutions have closed or merged. The total number of high school graduates is expected to peak in 2025, followed by a steady decline of more than 10% over the next 15 years.

Rising Discussion of the value of a college degree, raising concerns about affordability, student loan debt, workforce relevance, and return on investment.



# WHAT WE CAN DO

95% of colleges and universities are tuition-driven. Higher Education will need to focus on revenue-generating operations to ensure sustainability.

That's where Advancement shines

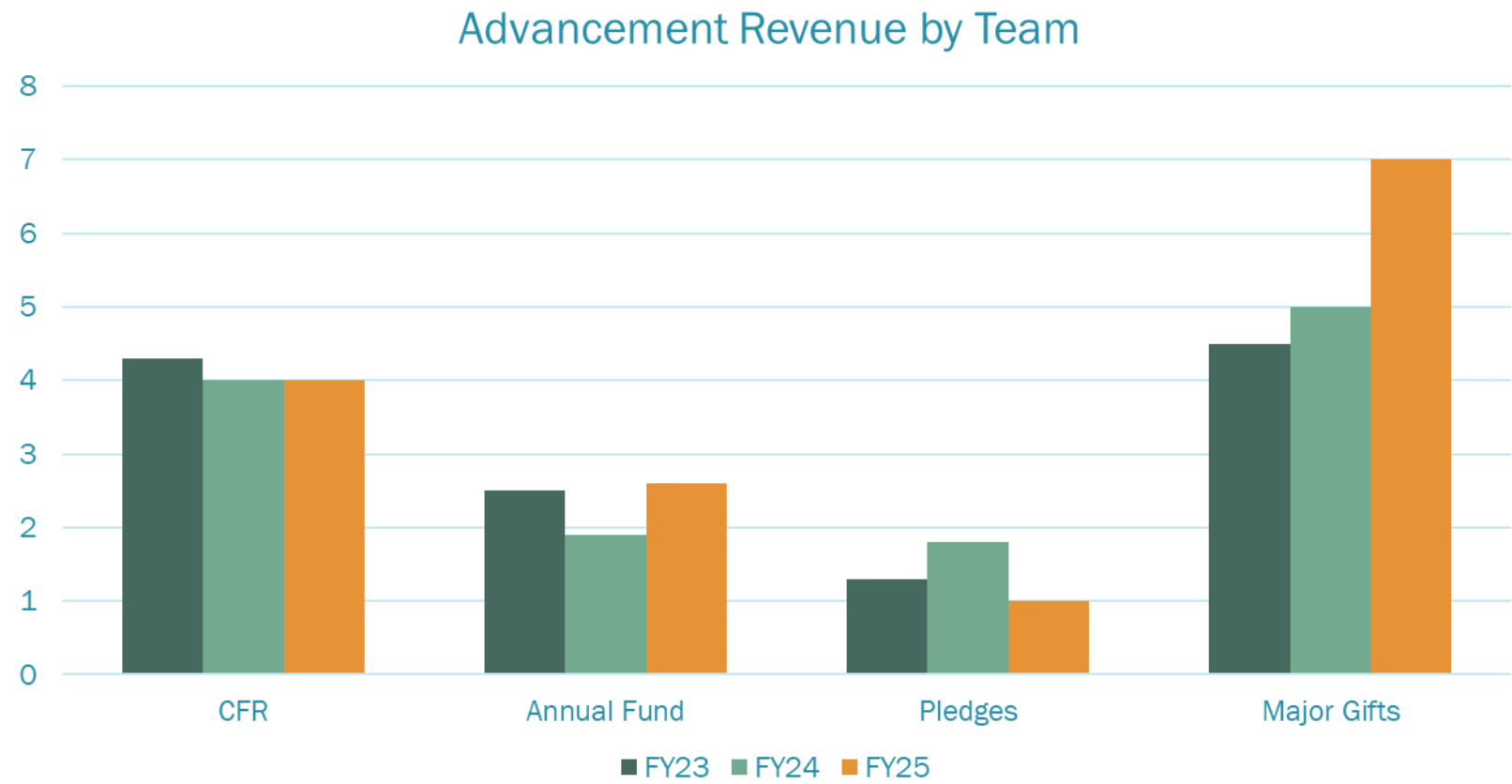




# TAKING STOCK

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# DEFINING SUCCESS



Total Advancement Revenue = CFR + AF + Pledges + Major Gifts





# DEFINING MAJOR GIFT TARGETS

$$\frac{\text{Major Gift FY26 \$ Target}}{\text{\# of Gift Officers}} = \text{Individual Gift Officer \$ Target}$$

# DEFINING MAJOR GIFT TARGETS

**\$10,000,000**

(Major Gift FY26 \$ Target)

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**5**

(# of Gift Officers)

**= \$2,000,000**

(Individual Gift Officer \$ Target)



# BREAKING IT DOWN

Major Gift = \$50,000

\$2,000,000

\$50,000

=

40

accepted proposals

KPIs	Annual Goal	Actual
Phone Calls	400	?
Visits	100	?
Proposals Submitted	45	?
Dollars Raised	\$2M	?



# COMMON PORTFOLIO ISSUES

Bloated Portfolios (150+ prospects per fundraiser)

Inactive Prospects (No contact, low engagement)

No Segmentation (no prioritization)





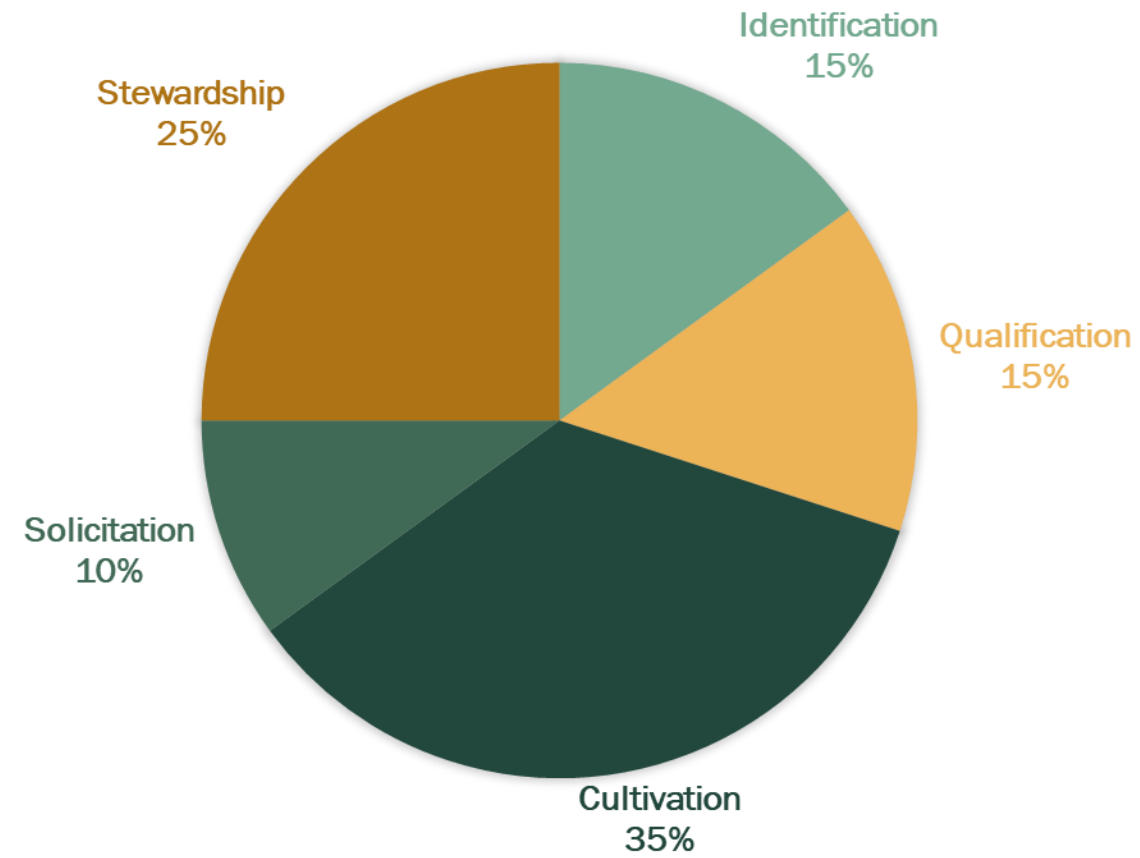
# DEFINING DONOR STAGES

Stage	Time in Stage	Definition	Actions
Identification	1-3 Months	Identify through engagement with organization	Qualify, Disqualify
Qualification	3-6 Months	Determine capacity, affinity, and inclination	Move to Cultivation, Disqualify, Return to Prospect Pool
Cultivation	9-18 Months	Engage in meaningful conversation and build trust	Move to Solicitation, Disqualify, Return to Prospect Pool
Solicitation	3-6 Months	Submit a Major Gift Proposal	Move into Stewardship, Move back to Cultivation, Disqualify, Return to Prospect Pool
Stewardship	18-24 Months	Express Gratitude, Share Impact	Cultivate for future major gifts or move to permanent stewardship



# RIGHT-SIZING PORTFOLIOS

## GOLDILOCKS PORTFOLIO



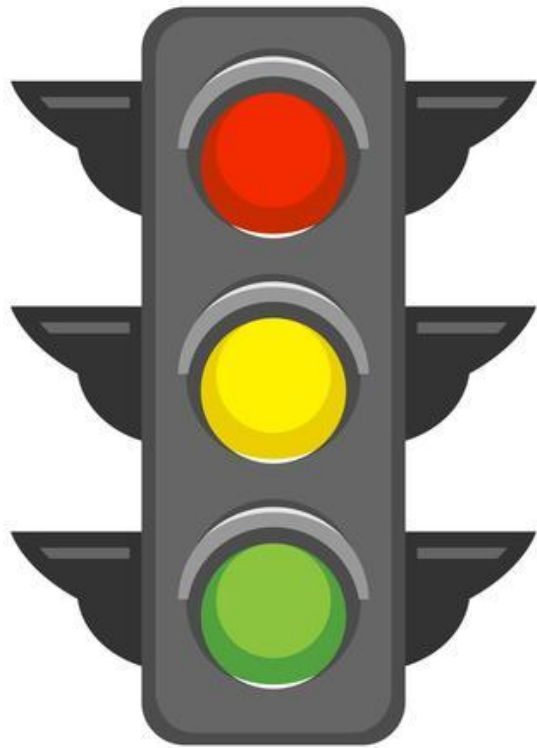


# NEXT STEPS

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# PORTFOLIO AUDIT

Healthy Portfolio = 90-120 prospects



Remove from Portfolio

Move into Next Stage within 90 days or Disqualify

High Priority Prospects



# MEASURING SUCCESS

- Set Monthly, Quarterly, and Annual Goals for each fundraiser
- Conduct Portfolio Review Meetings to track progress and discuss strategy
- Track progress in CRM to measure Deliverables
  - Contact Reports
  - Proposals
  - Research Requests
  - Moves

# REPORT ON ACTIVITY

	MGO 1	MGO 2	MGO 3	MGO 4	MGO 5
# Phone Calls	297	280	412	322	397
# of Visits	72	96`	120	120	144
# Submitted Proposals	8	11	26	17	32
# Dollars Raised	\$600,000	\$1,800,000	\$3,500,000	\$2,800,000	\$4,725,000





# QUESTIONS OR COMMENTS?

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Keep in touch

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# THANK YOU!

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evaluations in the mobile app.

