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EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

A Comprehensive Guide to Demonstrating the Need for Additional Staff to Enhance Productivity, Efficiency, and Employee Well-being

MAKING THE CASE FOR MORE STAFF

EXPLORE
PD25
New Depths

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

WHO ARE WE?

Kayla Ly

- Director of Prospect Research at the University of South Carolina
- 13+ years in Higher Education Fundraising
- Leads the Prospect Research team supporting fundraising efforts across 16 schools and colleges, central advancement, and leadership units at USC

WHO ARE WE?

Prisca Zaccaria

- Executive Director of Prospect Development at the University of South Carolina
- 23 years in Higher Education Fundraising
- Leads the Prospect Development team (Research + Prospect Strategy) supporting university-wide campaign efforts in close partnership with development leadership

WHAT YOU CAN EXPECT TO TAKE AWAY FROM THIS PRESENTATION

- A data-driven framework for justifying additional staff
- Real-world metrics and models to quantify research team capacity
- Scalable strategies to align prospect development work with campaign goals
- Tools to evaluate impact: scorecards, referral dashboards, and CRM tracking
- Approaches to improve team well-being, engagement, and retention
- Techniques for advocating with leadership using internal benchmarks and visuals

DEMONSTRATING THE NEED FOR ADDITIONAL STAFF TO:

PLAN OF ACTION

DEFINE	DEFINE THE NEED
QUANTIFY	QUANTIFY THE NEED
HIGHLIGHT	HIGHLIGHT THE IMPACT
DISCUSS	DISCUSS POSSIBLE IMPLICATIONS/REALITIES

DEFINE THE NEED

CASE STUDY: USC'S NEED FOR ADDITIONAL RESEARCH STAFF IN PROSPECT DEVELOPMENT

- USC launched a new campaign on **July 1, 2023**, prompting the rebuild of the Prospect Development team.
- Since then, **13 fundraisers** were added, bringing the total to **86**, increasing demand for new leads.
- An improved **analyst-to-fundraiser ratio** is critical to sustaining qualification and campaign momentum.
- **Campaign goals and timelines** were defined across all units.
- Research shifted to an **80% proactive focus** to identify major and principal gift prospects.
- A stronger prospect research team is essential to ensure timely referrals and maintain fundraiser pipeline activity.

QUANTIFY THE NEED

A REAL CONVERSATION WITH OUR AVP:

- AVP: “Hello Kayla, How many Research Analysts would it take to identify **14,055** referrals in the next **two years**? These are proactive referrals and make sure to factor in the analysts doing their "reactive" profiles and research, too. I am looking for **how many proactive referrals per month or week we should expect.**”

- Me: “Assuming we hire **experienced** analysts whose primary focus every day/week is identifying MG and PG leads, you could expect them to identify **10-15** (20 max, though that’s not a sustainable pace) per week. A *huge* stretch number would be identifying **700 per year per analyst** so you’d need **at least 10** to reach that goal. For context, our typical annual metrics would be around 100-150 prospects identified per analyst. Other expectations would include prequalifications, profiles, contact information verification, professional development, staff meetings, quarterly meetings, prospecting and travel lists, etc. And of course, management of all referrals sent including follow-up emails, re-referring prospects, etc.”

HIGHLIGHT THE BENEFIT

With 5 research analysts, we could proactively identify and refer significantly more major/principal gift prospects.

Referrals would be made within the **first 4 years** of the campaign.

Development Officers would then have **18 months** to qualify the prospects and secure a gift before the campaign ends.

This approach ensures a **steady pipeline** of high-quality leads and maximizes fundraising potential.

	Year 1	Year 2	Year 3	Year 4	Campaign Total
#1 Analyst	150	150	150	150	600
#2 Analyst	150	150	150	150	600
#3 Analyst	150	150	150	150	600
#4 Analyst	150	150	150	150	600
#5 Analyst	150	150	150	150	600
	750	750	750	750	3,000

POSSIBLE IMPLICATIONS/REALITIES

	Year 1	Year 2	Year 3	Year 4	Campaign Total
#1 Analyst	150	150	150	150	600
#2 Analyst	150	150	150	150	600
#3 Analyst	150	150	150	150	600
#4 Analyst	150	150	150	150	600
#5 Analyst	150	150	150	150	600
	750	750	750	750	3,000

Reality:

Year 1: 450
Year 2: 450
Year 3: 450
Year 4: 450
Campaign Total: 1,800

WHAT WAS THE PLAN IN JULY 2023?

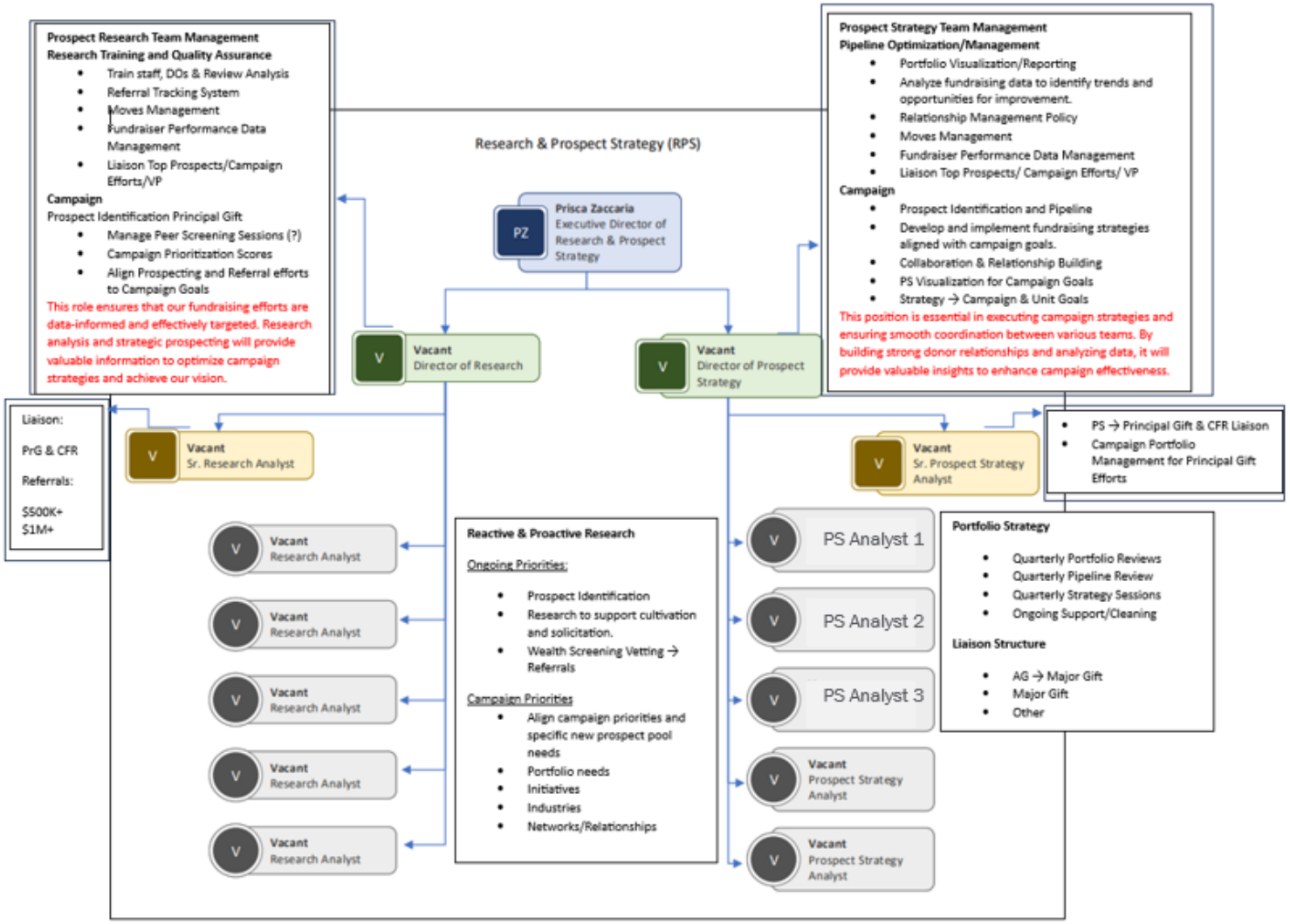
New Positions Planned:

1 Director of Research *(new role)*
1 Director of Prospect Strategy *(new role)*
1 Senior Research Analyst *(new role)*
1 Senior Prospect Strategy Analyst *(new role)*
4 Research Analysts
2 Prospect Strategy Analysts

Total New Positions: 10

Existing Staff at the Time:

1 Executive Director of Research & Prospect Strategy (Prisca)
3 Prospect Strategy Analysts



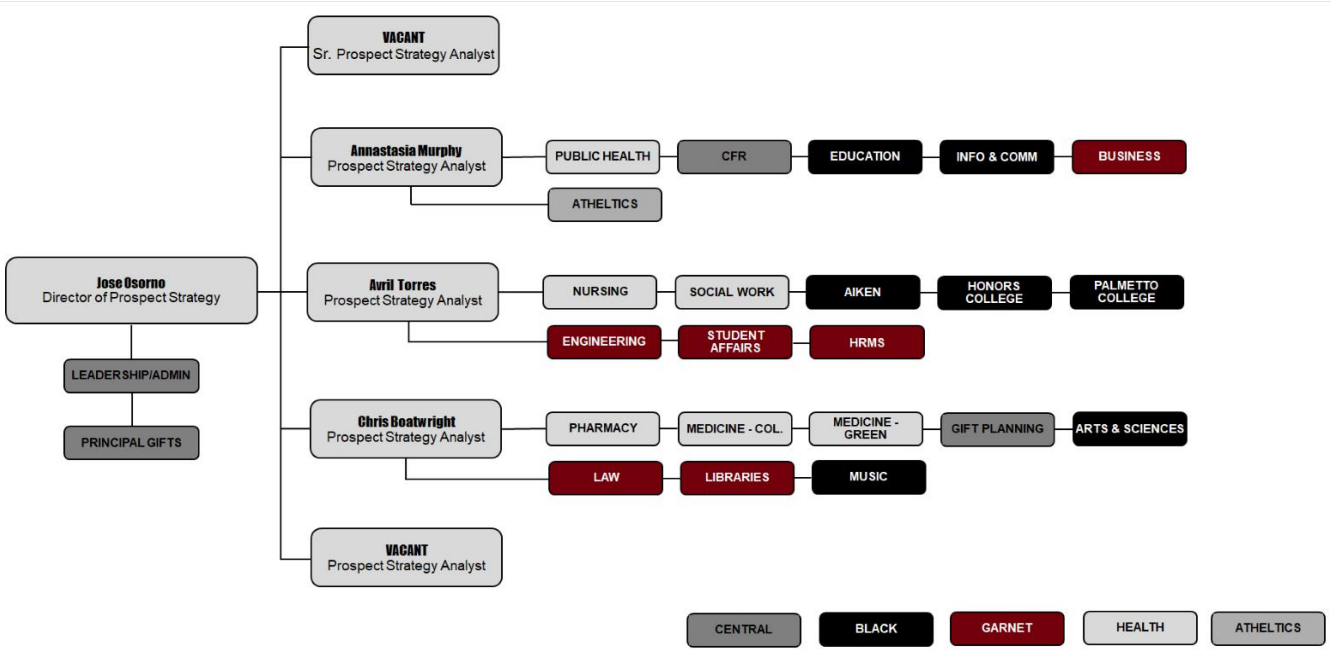
WHAT ACTUALLY HAPPENED

- Director of Prospect Strategy hired
- Director of Research hired
- 3 Research Analysts hired

- ❑ Team transitions impacted onboarding and progress
- ❑ Progress made despite staffing gaps and role shifts

HOW MANY FUNDRAISERS DO YOU SUPPORT?

Row Labels	Individuals	Count of Quarterly Meeting
⊞Administration	6	2
⊞Aiken	2	
⊞Arts and Sciences	3	3
⊞Athletics	9	
⊞Corporate and Foundation Relations	9	7
⊞Education	2	1
⊞Engineering and Computing	3	2
⊞Gift Planning	2	1
⊞Honors College	2	1
⊞Hospitality, Retail and Sport Management	2	1
⊞Information and Communications	2	
⊞Law	1	1
⊞Libraries	1	1
⊞Moore School of Business	4	3
⊞Music	4	1
⊞Nursing	1	1
⊞Palmetto College (PC)	2	1
⊞Pharmacy	2	1
⊞Principal Gifts	3	
⊞Social Work	2	1
⊞SOM-Columbia	2	1
⊞Student Affairs	1	1
Grand Total	65	30



Our research and strategy analysts are assigned to specific units. We call them "liaisons", and they are responsible for leading quarterly meetings and general aid of their assigned fundraisers. You can imagine what it might have looked like for our fundraisers AND our PD team before adding additional staff!

POSSIBLE IMPLICATIONS/REALITIES

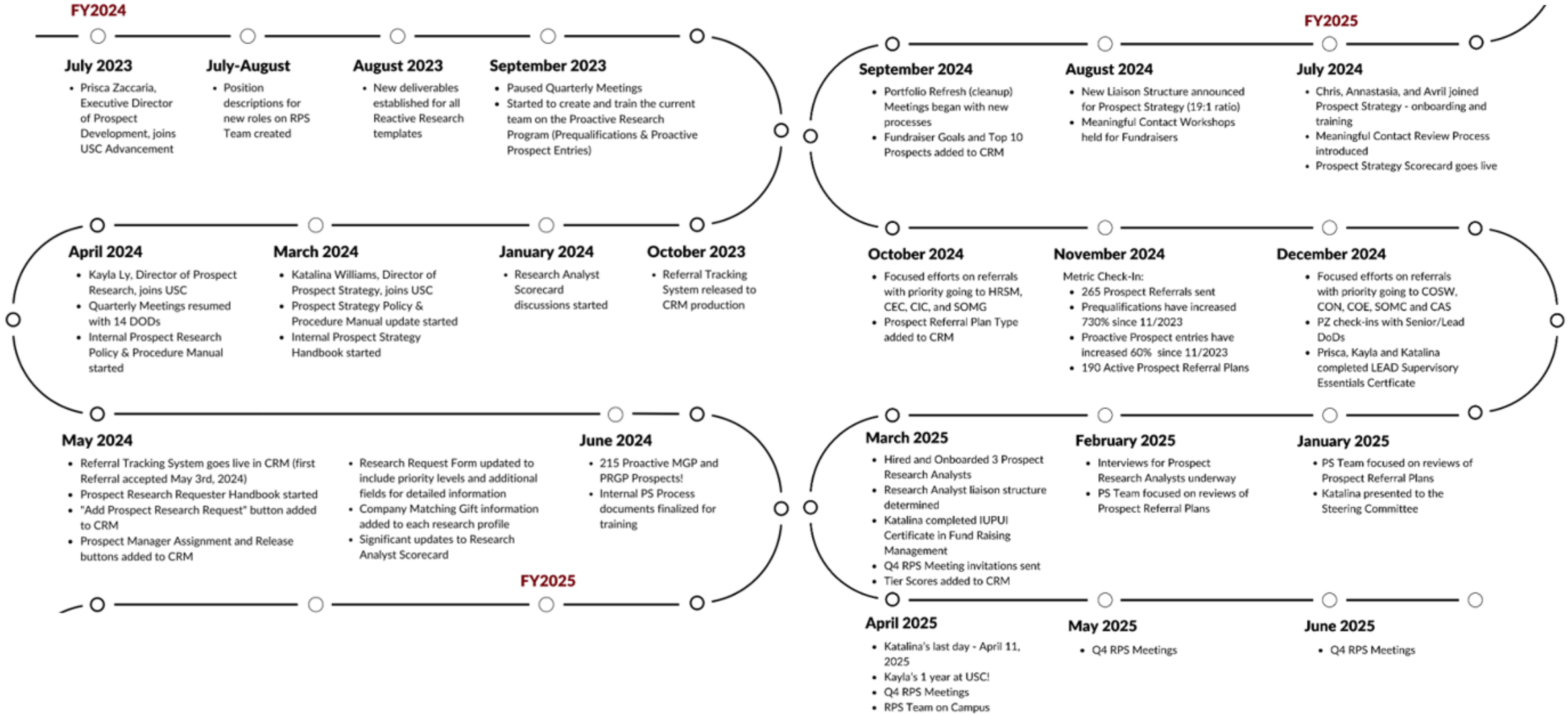
If NO research staff is added, the Research team will continue to:

- Fulfill core research responsibilities while managing all unit liaison assignments
- Handle 100% of both reactive and proactive research needs
- Prepare for and attend all quarterly portfolio and pipeline meetings based on liaison structure
- Support special projects and respond to increasing campaign priorities

- ❑ *Is this sustainable?*
- ❑ *What are the implications here?*
- ❑ *Have you experienced this?*

QUESTIONS?

TELL YOUR STORY → MILESTONES→ NEW NEEDS



HOW DO WE IDENTIFY AND QUALIFY THE NEED?

Assumptions for **Each Role** (Based on Ideal High-End Portfolio Size & Distribution)

Fundraiser Role	Ideal Portfolio Size	Ideal Distribution (Qual/Cult/Sol)	Solicitations to Close This FY (Est.)	Qualification Needed to Replenish
Lead Fundraiser	50 - 100	30/50/20	15	25
Assistant Director	75 - 125	50/50/25	25	35
AVP	25 - 50	15/20/15	15	15
VP	5 - 25	5/5/15	10	5

PROACTIVE LEADS TO QUALIFY BY ROLE

Fundraiser Role	Actual Portfolio Size	New Proactive Leads Fundraisers needs to Qualify
Lead Fundraiser (e.g., Senior Director)	75 → 30 in qualification and 15 in solicitation to close this FY	10–15 new ($250K+)
Assistant Director (e.g., Major Gift Officer)	90 → 30 in qualification and 25 in solicitation to close this FY	20–25 new ($25K+)
AVP	30 → 10 in qualification and 15 in solicitation to close this FY	10–15 new ($1M+)
VP	20 → 5 in qualification and 10 in solicitation to close this FY	10–15 new ($10M+)

HOW MANY NEW PROSPECTS REFERRALS ARE NEEDED FROM THE RESEARCH TEAM?

HOW MANY REFERRALS?

Proactive Prospects = 100

Vetted Prospects = 50

Referrals = 25

DO contacts = ~ 12

Visits = 4 - 6

Asks = 2 - 3

GIFT = 1

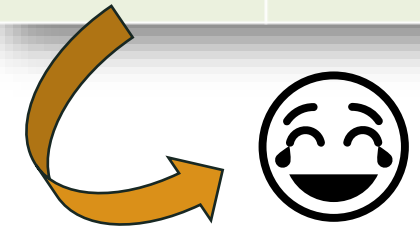
SO…. REFERRAL FUNNEL MATH BY ROLE

Role	Fundraiser Count	Qualified Needed	Referrals Needed	Vetted Needed	Proactive Needed
Lead Fundraiser	16	200	834	1668	3,336
Assistant Director	64	1,440	6,000	12,000	24,000
AVP	6	75	313	626	1,252
VP	1	12	53	106	212
TOTAL		1,727	7,200	14,400	28,800

RESEARCHER PRODUCTION SUMMARY

Metric	Value
Total Referrals Needed	7,200
Total Vetted Prospects Needed	14,400
Expected Referrals per Researcher	200
Expected Vetted per Researcher	400
Researchers Needed (based on referrals)	36
Researchers Needed (based on vetted)	36
Recommended Researcher Headcount	36

Researchers	Total Referrals Produced	Total Vetted Produced	Status
2	400	800	Insufficient
4	800	1600	Insufficient
5	1000	2000	Insufficient
36	7200	14400	Sufficient



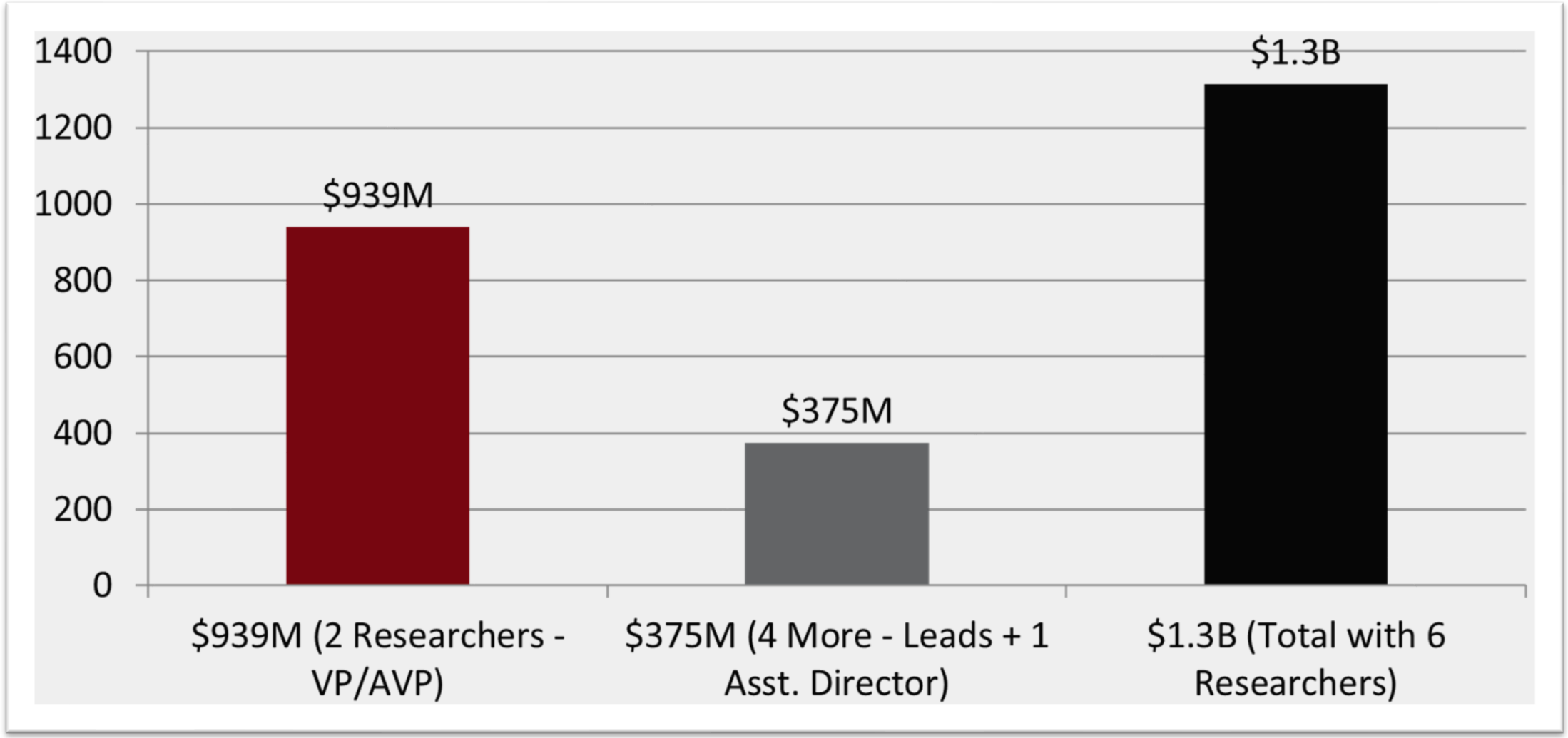
2 RESEARCHERS = VP/AVP ONLY
6 RESEARCHERS = ADD LEAD FUNDRAISERS

Metric	Value
VP + AVP Referrals Needed	366
VP + AVP Vetted Prospects Needed	732
VP + AVP Proactive Prospects Needed	1464
Researchers Needed (based on referrals)	2
Researchers Needed (based on vetted)	2
Recommended Researcher Headcount (VP + AVP only)	2

Metric	Value
Lead Fundraisers + AVP + VP Referrals Needed	1,200
Lead Fundraisers + AVP + VP Vetted Proactive Prospects Needed	4,800
Lead Fundraisers + AVP + VP Referrals Needed	2,400
Researchers Needed (based on vetted)	6
Researchers Needed (based on referrals)	6
Recommended Researcher Headcount (Lead + AVP + VP)	6

I need 4 more researchers please!

GIFT CAPACITY GROWTH WITH RESEARCH TEAM EXPANSION



STRATEGIC FUNDRAISING IMPACT

Unlocks Over $1.3B in Potential Gift Capacity

Through qualified leads for VPs, AVPs, Lead Fundraisers, and Assistant Directors (1).

Increases Volume of Campaign-Ready Prospects

Enables strategic referrals aligned with portfolio needs and campaign priorities.

Accelerates Qualification Cycles

Reduces lag time between discovery and assignment by maintaining research bandwidth.

OPERATIONAL EFFICIENCY

Improves Researcher-to-Fundraiser Ratio

Moves closer to the industry standard (1:8–12) for higher effectiveness and manageable workload.

Reduces Bottlenecks in Portfolio Development

Keeps up with lead generation demands, especially from newly hired or restructured frontline teams.

Supports Better Coverage Across Fundraising Units

Expands research support from just VP/AVPs to include Leads and Assistant Directors.

DATA-DRIVEN PLANNING

Enables Predictive Prospecting

Researchers can proactively identify high-potential prospects while still reacting to requests.

Provides Leadership with Better Visibility

Consistent referral activity and qualification metrics to be monitored and reported.

Supports Campaign Goal Setting

Data-informed portfolio building strengthens confidence in ask pipelines.

TEAM STABILITY & SCALABILITY

Balances Team Workload to Prevent Burnout

Sustainable capacity across research staff increases retention and productivity.

Scales with Growing Fundraising Ambitions

Supports future growth in campaign phases, special initiatives, or unit expansion.

QUESTIONS?

DEMONSTRATING THE NEED FOR ADDITIONAL STAFF TO:

Enhance Efficiency

HOW TO PRIORITIZE EFFICIENCY

How to prioritize the team's focus?

•Align with university-wide priorities

•Support unit-specific fundraising goals

•Focus on fundraisers' individual portfolios and targets

•Factor in current team capacity and expertise

•Prioritize areas with high potential and unmet needs

How we changed from reactive to proactive?

- Reframe research from intake-based to strategic prospecting
- Build deliverables that match solicitation needs and timing
- Automate where possible to anticipate needs
- Create a culture of agility—pivot as goals evolve
- Use data to drive and justify proactive focus

HOW TO PRIORITIZE EFFICIENCY

How will we know we succeeded?

•Balance deliverables and requests based on actual need and usage

•The team isn't overwhelmed—right workload, right priorities

•Fundraisers receive timely, actionable support

•Processes are fluid, collaborative, and continuously improving

•Prospect development is seen as a strategic partner, not a service queue

How do we measure the impact?

- Use scorecards to show tangible results of your work
- Track increases in qualification outreach and conversion rates
- Monitor how prospects move through the pipeline post-research/referral
- Measure everything: volume, velocity, and value
- Visualize your story—dashboards, trendlines, and clear takeaways
- Don't confuse activity with impact: motion ≠ progress unless it's intentional, aligned, and moving prospects forward

WHAT ARE YOUR EXPECTATIONS?

Yearly Expectations – Individual and Team Goals

Average yearly expectations for an experienced Development Analyst II based on 48 working weeks (240 days)

REACTIVE RESEARCH:

- Profiles Completed: **50-200** per year (depending on difficulty level)
- Prequalifications: **250 +**

PROACTIVE RESEARCH:

- New Prospects Identified (**IR**): 125 +
- Proactive Prospects Misc. Entries: (**RE** Misc. Entries): **100 +**
- Referrals: **50 +**

Average yearly expectations for Prospect Research team based on 48 working weeks (240 days) and 10 Research team members

REACTIVE RESEARCH:

- Profiles Completed: **500-2,000** per year (depending on difficulty level)
- Prequalifications: **2,500 +**

PROACTIVE RESEARCH:

- New Prospects Identified (**IR**): 1,250 +
- Proactive Prospects Misc. Entries: (**RE** Misc. Entries): **1,000 +**
- Referrals: **500 +**

EXPECTED PRODUCTIVITY

Research Products Completed	YEAR	MONTH	WEEK	DAY
PROSPECT PROFILES	40+	3	1	
PROACTIVE PROSPECTS	240+	25	5	1
CAPACITY VERIFICATIONS	240+	25	5	1
REFERRALS	200+	16	4	1
MISCELLANEOUS	200+	16	4	1
CONTACT INFO UPDATES	480+	40	10	2
Prospect Management Activity	**YEAR**	**MONTH**	**WEEK**	**DAY**
QUARTERLY PORTFOLIO REVIEWS CONDUCTED	40	3	1	
PM-NEW PROSPECTS IDENTIFIED AND DO QUALIFIED	200	16	3	
PROSPECT REFERRALS MOVED TO QUALIFICATION	100	8	2	
PROSPECT REFERRALS MOVED TO CULTIVATION	50	4	1	
PM SYSTEM EDITS REVIEWED AND PROCESSED	varies			
PM PROJECTS COMPLETED	varies			
ONE ON ONE STRATEGY SESSIONS WITH FUNDRAISERS	40	3	1	
CONTACT REPORTS REVIEWED FOR CONTENT/CODING	1200	120	24	5
CLEANUP FILES PROCESSESED	40	3	1	
CONSULTATION SESSIONS ON REQUEST	varies			

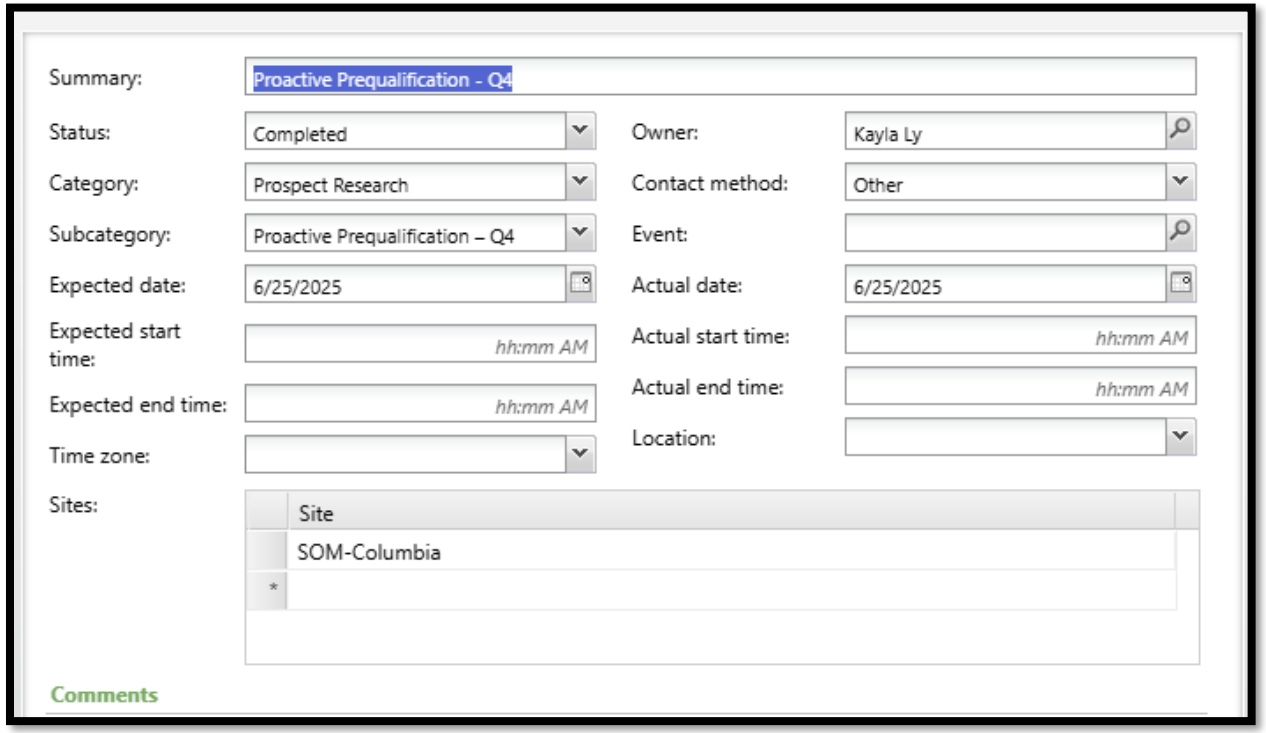
DO YOU HAVE SYSTEMS IN PLACE?

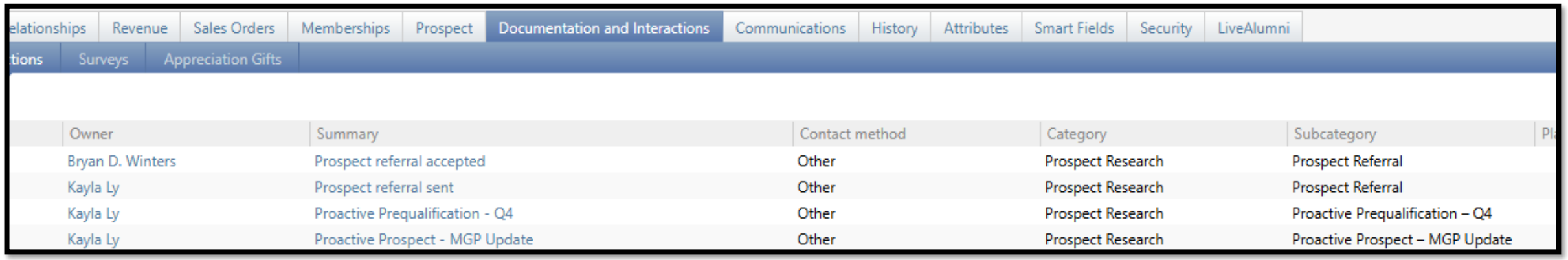
HOW ARE YOU CURRENTLY MEASURING YOUR OUTPUT/IMPACT?

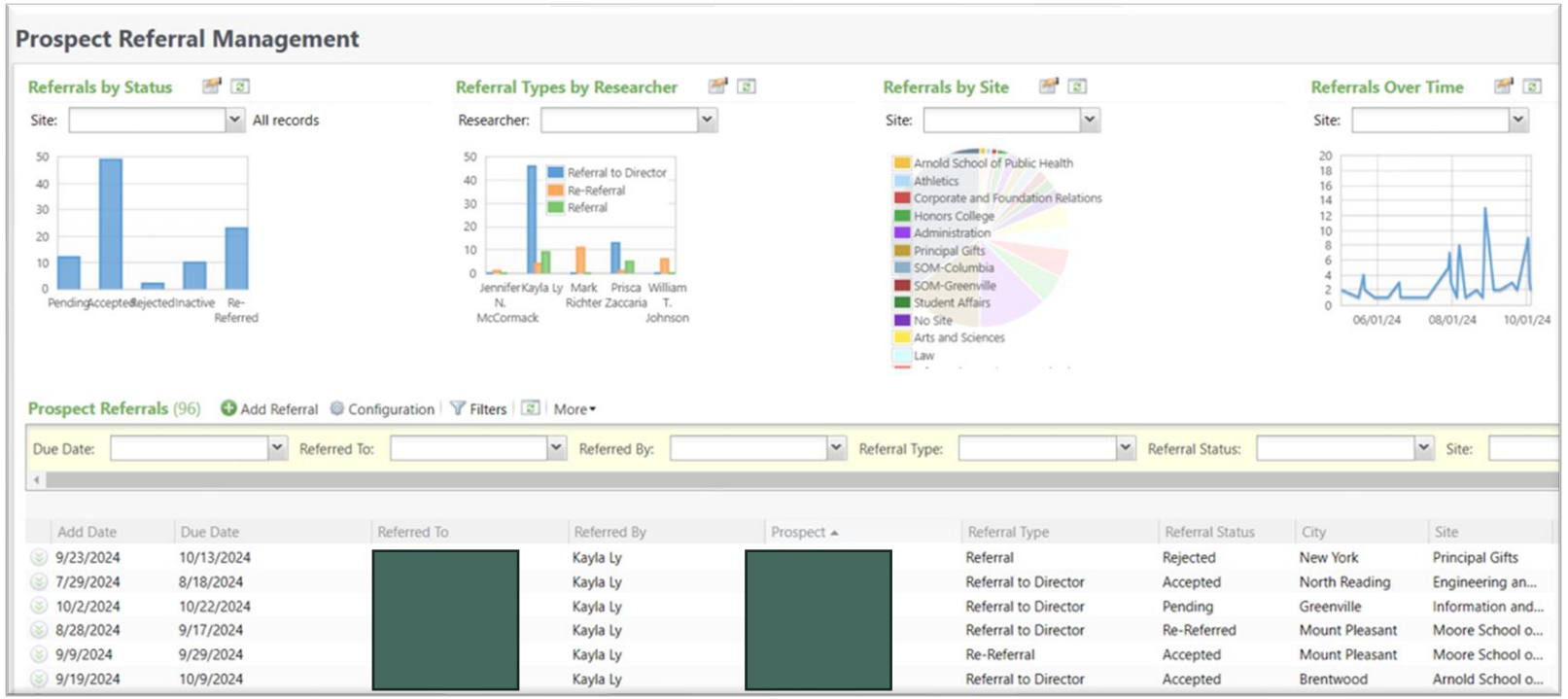
MAYBE A BETTER QUESTION IS, ARE YOU CURRENTLY MEASURING YOUR OUTPUT/IMPACT?

IS WHAT YOU DO REPORTABLE?

BBCRM INTERACTIONS

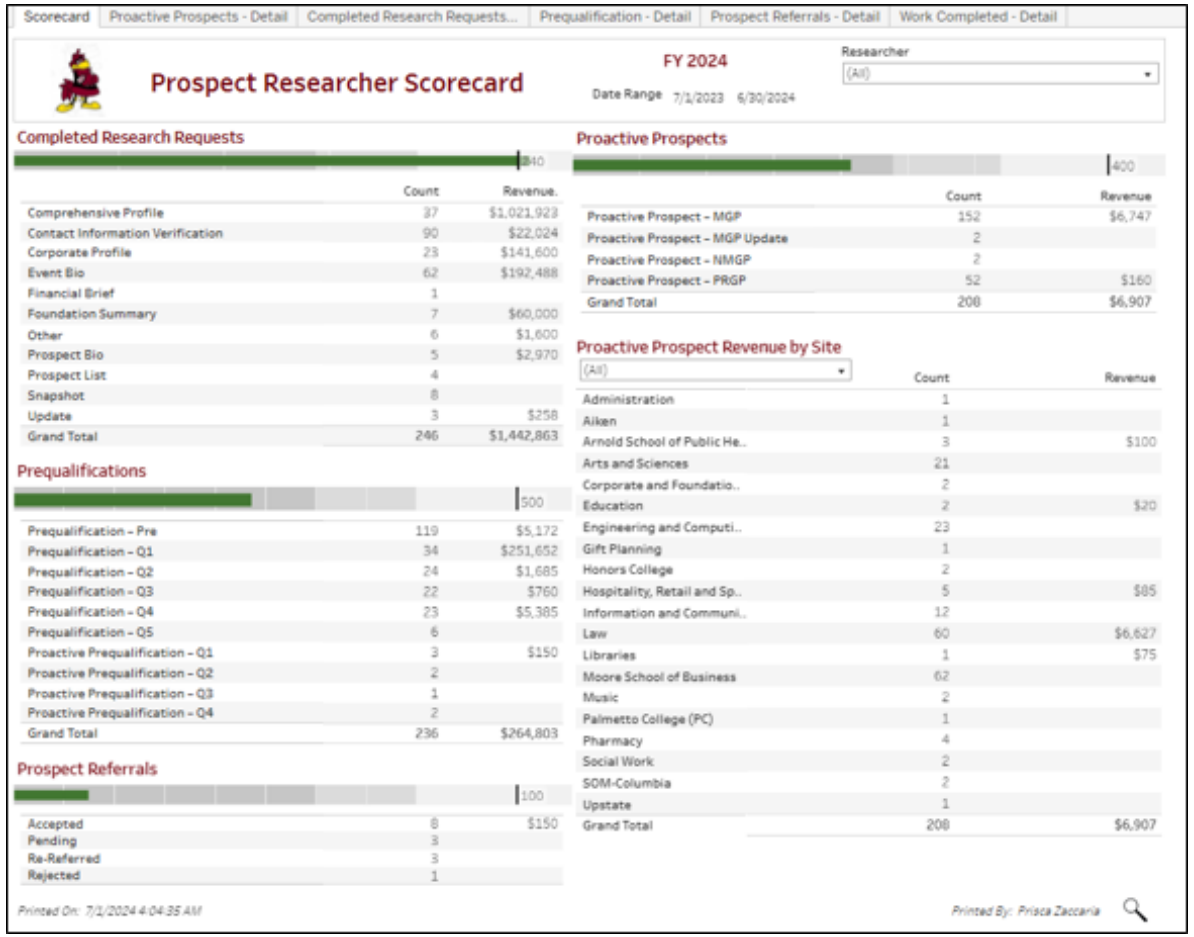






REFERRAL TRACKING SYSTEM

RPS SCORECARD



Scorecard | Proactive Prospects - Detail | Completed Research Requests... | Prequalification - Detail | Prospect Referrals - Detail | Work Completed - Detail

Prospect Researcher Scorecard

FY 2024

Date Range 7/1/2023 6/30/2024

Researcher: (All)

Completed Research Requests

340

	Count	Revenue
Comprehensive Profile	37	$1,021,923
Contact Information Verification	90	$22,024
Corporate Profile	23	$141,600
Event Bio	62	$192,488
Financial Brief	1	
Foundation Summary	7	$60,000
Other	6	$1,600
Prospect Bio	5	$2,970
Prospect List	4	
Snapshot	8	
Update	3	$258
Grand Total	246	$1,442,863

Prequalifications

500

Prequalification - Pre	119	$5,172
Prequalification - Q1	34	$251,652
Prequalification - Q2	24	$1,685
Prequalification - Q3	22	$760
Prequalification - Q4	23	$5,385
Prequalification - Q5	6	
Proactive Prequalification - Q1	3	$150
Proactive Prequalification - Q2	2	
Proactive Prequalification - Q3	1	
Proactive Prequalification - Q4	2	
Grand Total	236	$264,803

Prospect Referrals

100

Accepted	8	$150
Pending	3	
Re-Referred	3	
Rejected	1	

Proactive Prospects

400

	Count	Revenue
Proactive Prospect - MGP	152	$6,747
Proactive Prospect - MGP Update	2	
Proactive Prospect - NMGP	2	
Proactive Prospect - PRGP	52	$160
Grand Total	208	$6,907

Proactive Prospect Revenue by Site

(All)

	Count	Revenue
Administration	1	
Aiken	1	
Arnold School of Public He..	3	$100
Arts and Sciences	21	
Corporate and Foundatio..	2	
Education	2	$20
Engineering and Computi..	23	
Gift Planning	1	
Honors College	2	
Hospitality, Retail and Sp..	5	$85
Information and Communi..	12	
Law	60	$6,627
Libraries	1	$75
Moore School of Business	62	
Music	2	
Palmetto College (PC)	1	
Pharmacy	4	
Social Work	2	
SOM-Columbia	2	
Upstate	1	
Grand Total	208	$6,907

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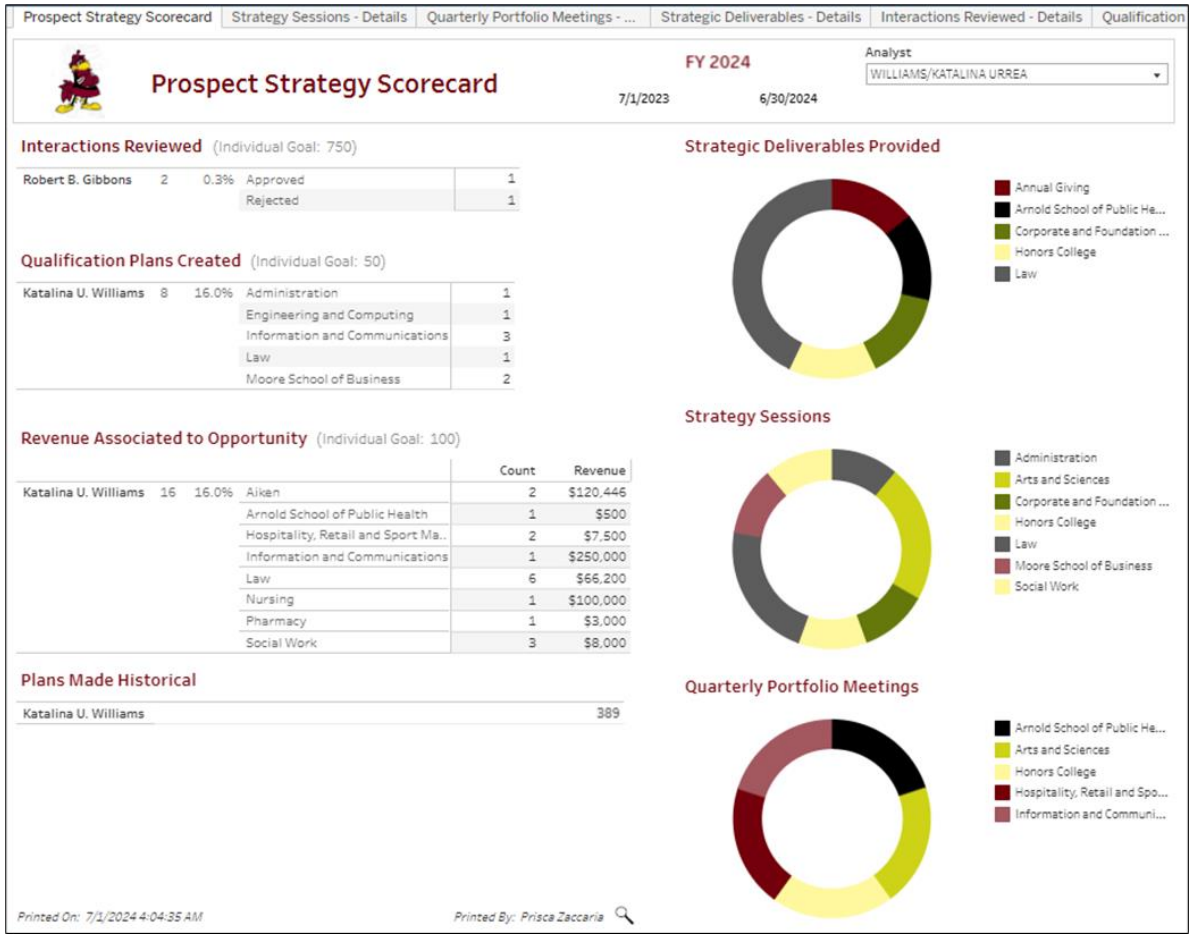

Prospect Strategy Scorecard | Strategy Sessions - Details | Quarterly Portfolio Meetings - ... | Strategic Deliverables - Details | Interactions Reviewed - Details | Qualification

Prospect Strategy Scorecard

FY 2024

7/1/2023 6/30/2024

Analyst: WILLIAMS/KATALINA URREA

Interactions Reviewed (Individual Goal: 750)

Robert B. Gibbons	2	0.3%	Approved	1
			Rejected	1

Qualification Plans Created (Individual Goal: 50)

Katalina U. Williams	8	16.0%	Administration	1
			Engineering and Computing	1
			Information and Communications	3
			Law	1
			Moore School of Business	2

Revenue Associated to Opportunity (Individual Goal: 100)

				Count	Revenue
Katalina U. Williams	16	16.0%	Aiken	2	$120,446
			Arnold School of Public Health	1	$500
			Hospitality, Retail and Sport Ma..	2	$7,500
			Information and Communications	1	$250,000
			Law	6	$66,200
			Nursing	1	$100,000
			Pharmacy	1	$3,000
			Social Work	3	$8,000

Plans Made Historical

Katalina U. Williams	389

Strategic Deliverables Provided

Strategy Sessions

Quarterly Portfolio Meetings

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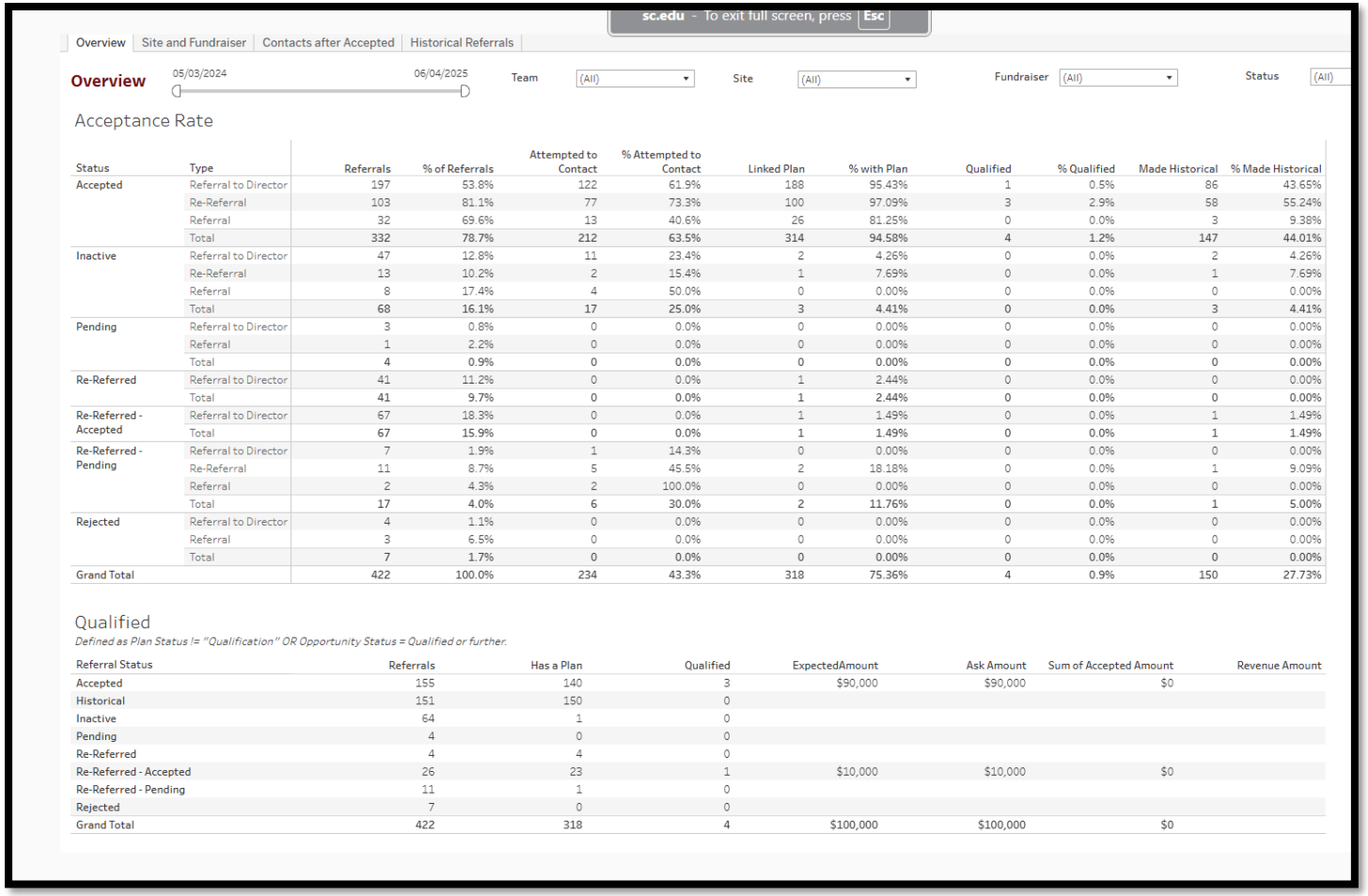
REFERRAL DASHBOARD



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Overview | Site and Fundraiser | Contacts after Accepted | Historical Referrals

Overview 05/03/2024 06/04/2025 Team (All) Site (All) Fundraiser (All) Status (All)

Acceptance Rate

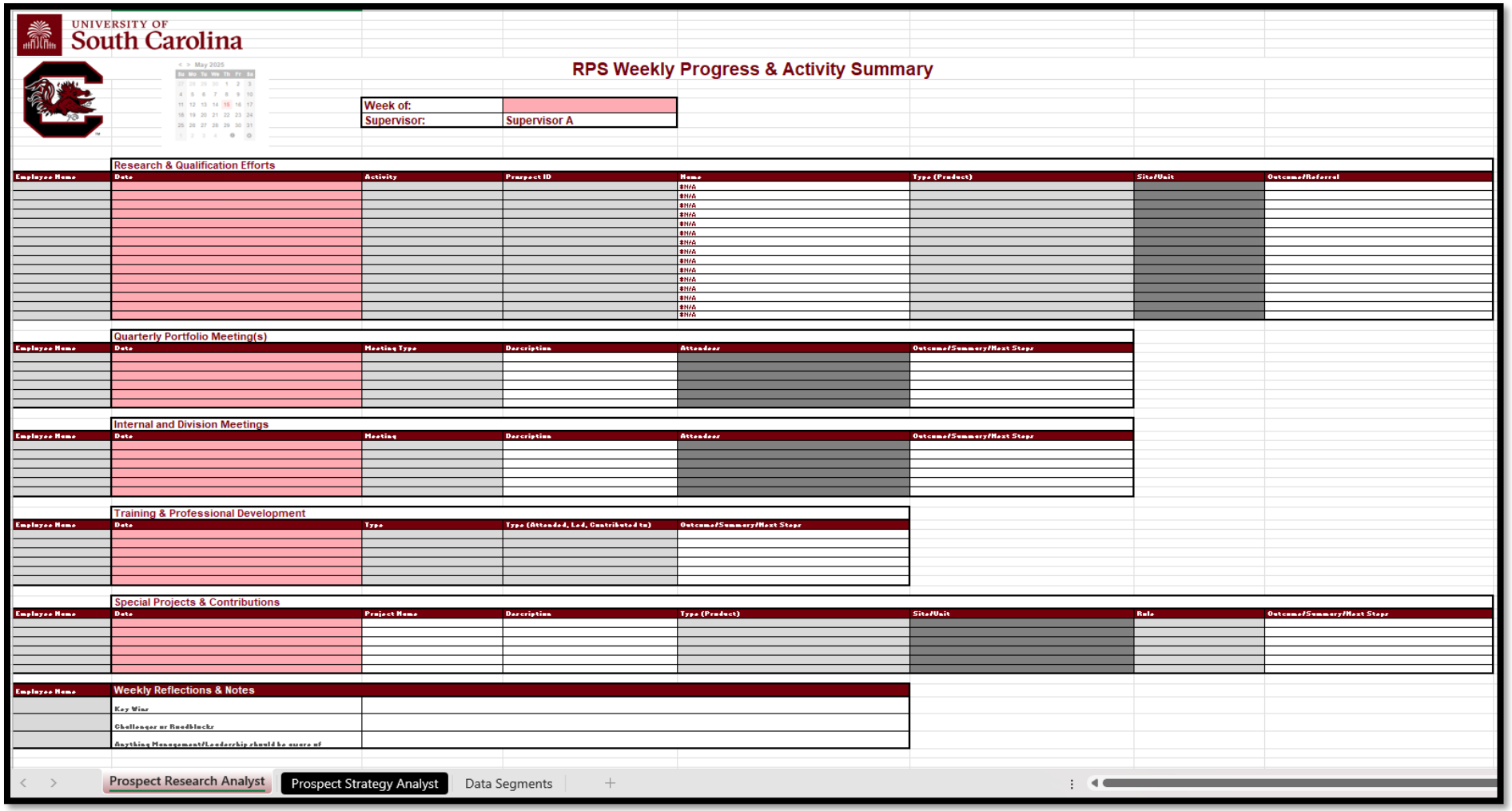
Status	Type	Referrals	% of Referrals	Attempted to Contact	% Attempted to Contact	Linked Plan	% with Plan	Qualified	% Qualified	Made Historical	% Made Historical
Accepted	Referral to Director	197	53.8%	122	61.9%	188	95.43%	1	0.5%	86	43.65%
	Re-Referral	103	81.1%	77	73.3%	100	97.09%	3	2.9%	58	55.24%
	Referral	32	69.6%	13	40.6%	26	81.25%	0	0.0%	3	9.38%
	Total	332	78.7%	212	63.5%	314	94.58%	4	1.2%	147	44.01%
Inactive	Referral to Director	47	12.8%	11	23.4%	2	4.26%	0	0.0%	2	4.26%
	Re-Referral	13	10.2%	2	15.4%	1	7.69%	0	0.0%	1	7.69%
	Referral	8	17.4%	4	50.0%	0	0.00%	0	0.0%	0	0.00%
	Total	68	16.1%	17	25.0%	3	4.41%	0	0.0%	3	4.41%
Pending	Referral to Director	3	0.8%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Referral	1	2.2%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Total	4	0.9%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Re-Referred	Referral to Director	41	11.2%	0	0.0%	1	2.44%	0	0.0%	0	0.00%
	Total	41	9.7%	0	0.0%	1	2.44%	0	0.0%	0	0.00%
Re-Referred - Accepted	Referral to Director	67	18.3%	0	0.0%	1	1.49%	0	0.0%	1	1.49%
	Total	67	15.9%	0	0.0%	1	1.49%	0	0.0%	1	1.49%
Re-Referred - Pending	Referral to Director	7	1.9%	1	14.3%	0	0.00%	0	0.0%	0	0.00%
	Re-Referral	11	8.7%	5	45.5%	2	18.18%	0	0.0%	1	9.09%
	Referral	2	4.3%	2	100.0%	0	0.00%	0	0.0%	0	0.00%
	Total	17	4.0%	6	30.0%	2	11.76%	0	0.0%	1	5.00%
Rejected	Referral to Director	4	1.1%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Referral	3	6.5%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
	Total	7	1.7%	0	0.0%	0	0.00%	0	0.0%	0	0.00%
Grand Total		422	100.0%	234	43.3%	318	75.36%	4	0.9%	150	27.73%

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	

WEEKLY ACCOMPLISHMENTS



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RPS Weekly Progress & Activity Summary

Week of:	
Supervisor:	Supervisor A

Research & Qualification Efforts

Employee Name	Date	Activity	Prospect ID	Name	Type (Product)	Site/Unit	Outcome/Referral
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			
				#N/A			

Quarterly Portfolio Meeting(s)

Employee Name	Date	Meeting Type	Description	Attendees	Outcome/Summary/Next Steps

Internal and Division Meetings

Employee Name	Date	Meeting	Description	Attendees	Outcome/Summary/Next Steps

Training & Professional Development

Employee Name	Date	Type	Type (Attended, Led, Contributed to)	Outcome/Summary/Next Steps

Special Projects & Contributions

Employee Name	Date	Project Name	Description	Type (Product)	Site/Unit	Role	Outcome/Summary/Next Steps

Employee Name	Weekly Reflections & Notes
	Key Wins
	Challenges or Roadblocks
	Anything Management/Leadership should be aware of

Prospect Research Analyst | Prospect Strategy Analyst | Data Segments

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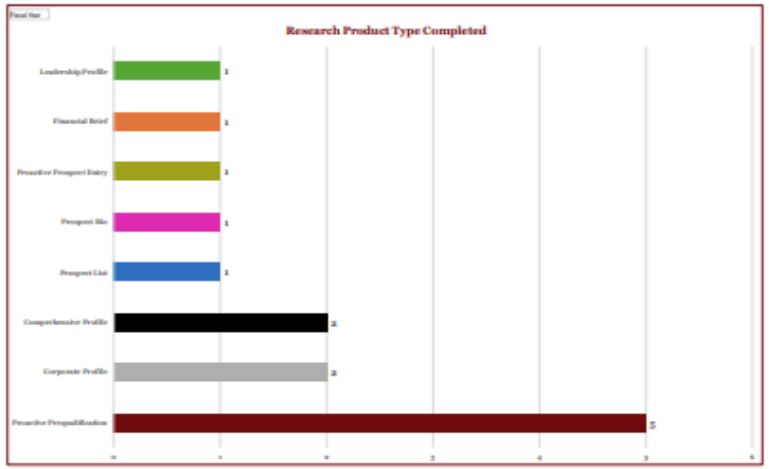
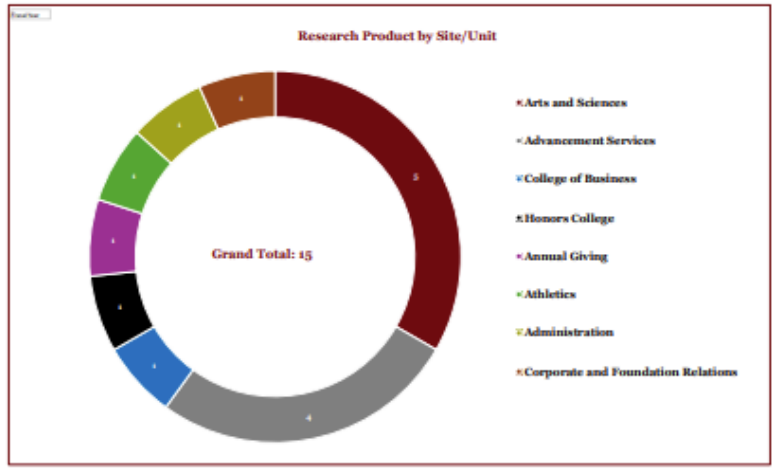
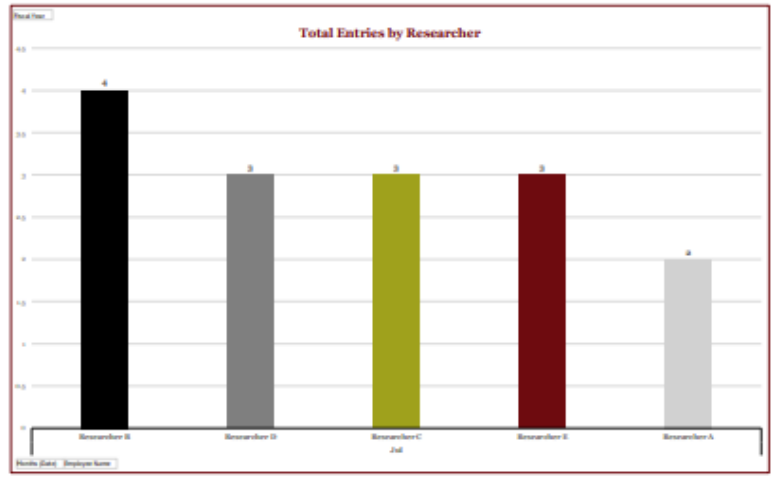
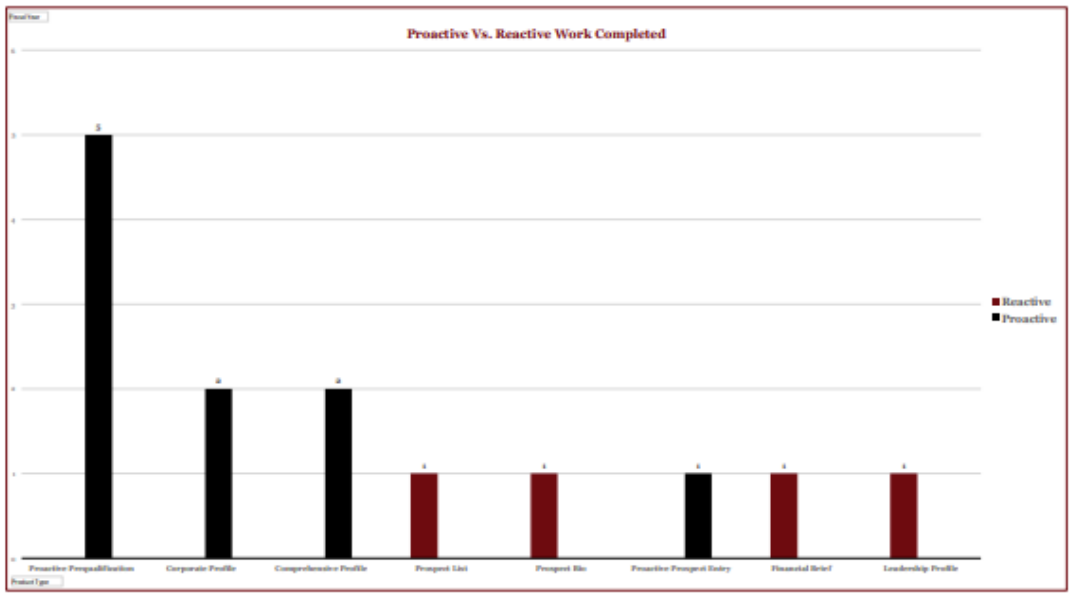
Office of Prospect Research Impact Report

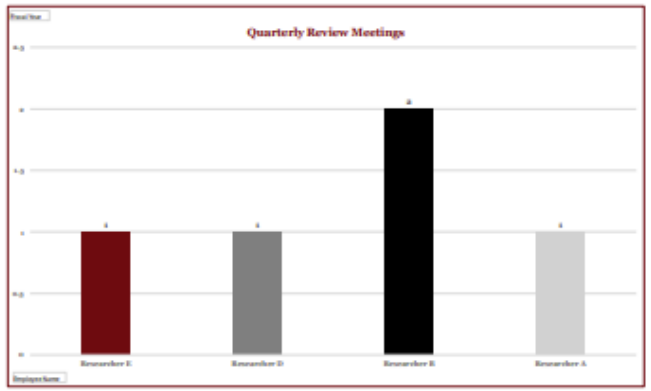
FY26 - July 2025

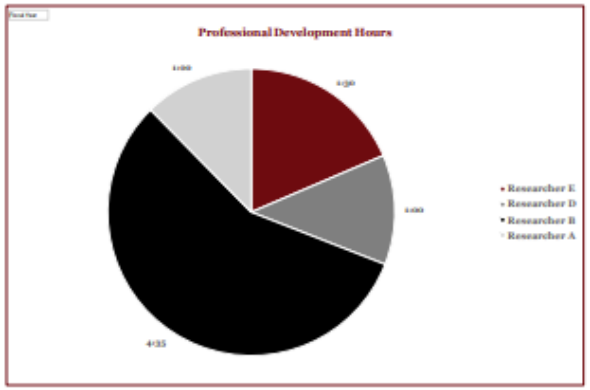












EXPLORE New Depths

PROSPECT DEVELOPMENT 2025

apra

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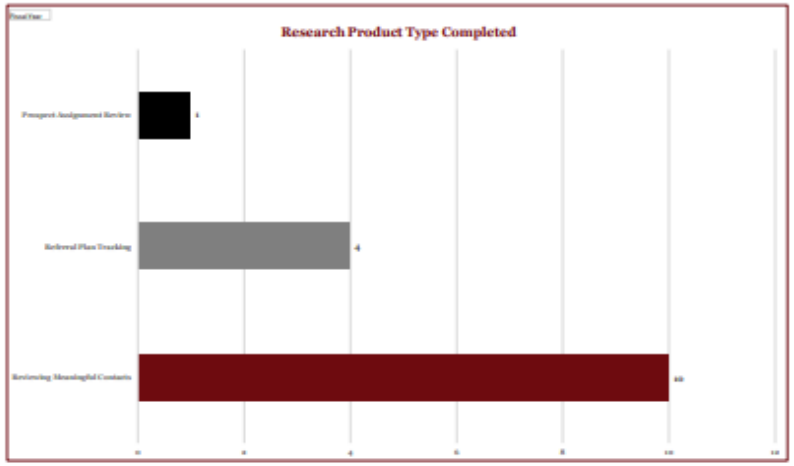
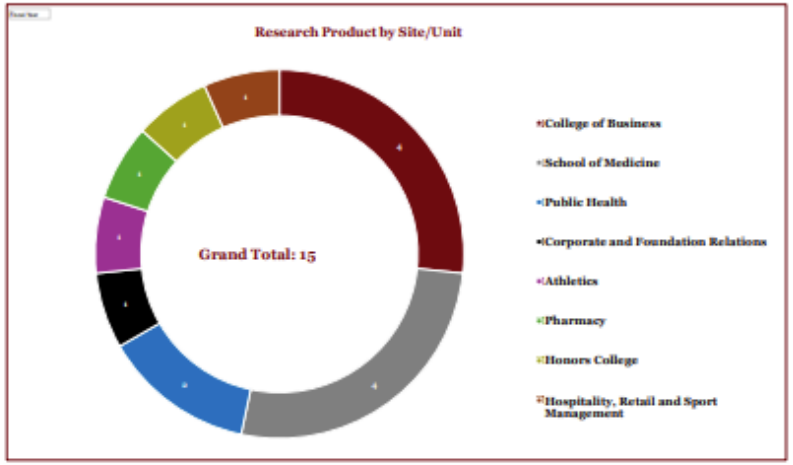
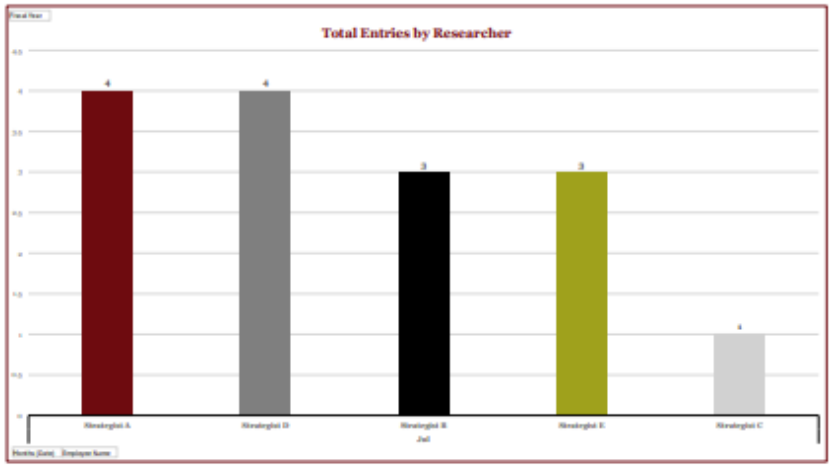
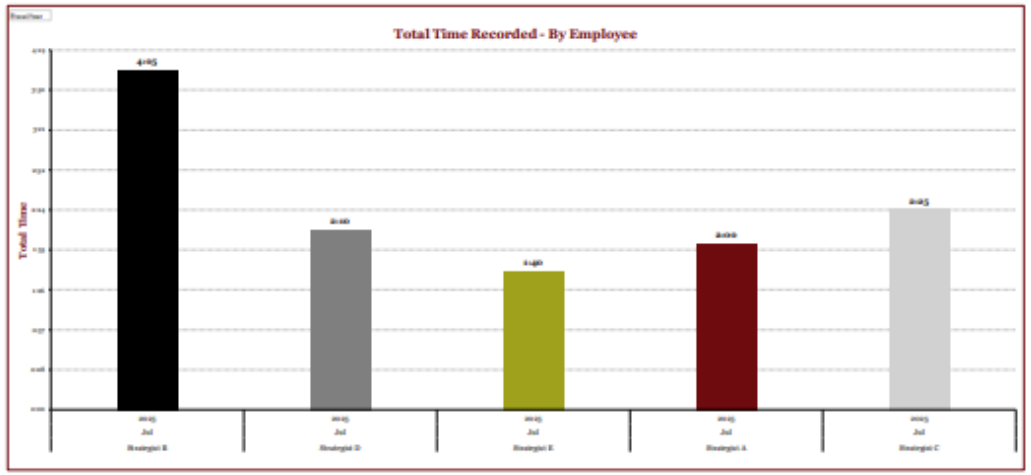
Office of Prospect Strategy Impact Report

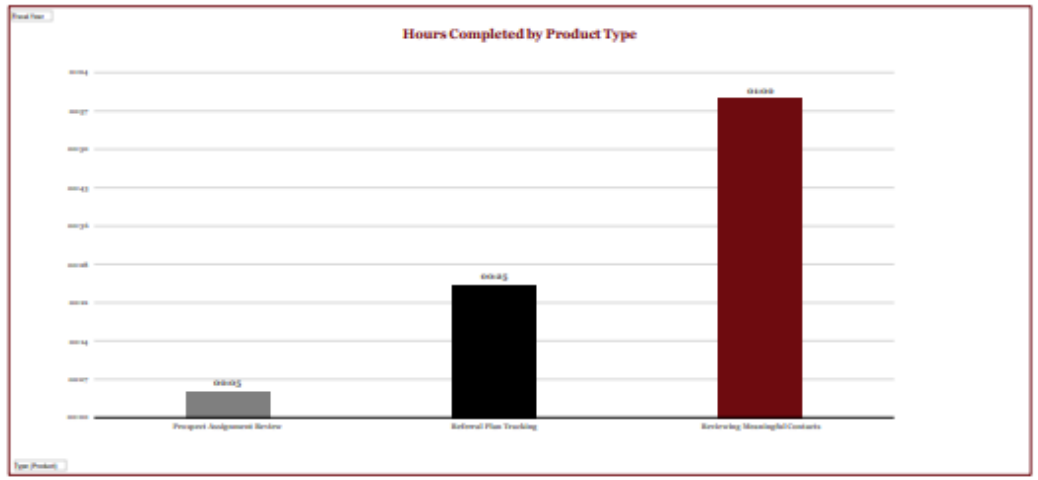
FY26 - July 2025











EXPLORE New Depths

PROSPECT DEVELOPMENT 2025

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WHY DO WE MEASURE AND TRACK?

Email from Fundraiser:

"In a nutshell, we need help finding funding for the culinary medicine program, which is part of the School of Medicine's FoodShare program. As is reflected in the info on the website, the culinary medicine program also works hand in hand with the Fresh Food Box and the VeggieRX programs

*This Culinary Medicine was previously grant supported, and the funding for the program, as well as the grant-funded personnel, runs out of money in December 2025. Consequently, **time is of the essence** with this request."*

Timeline:

May 29th: Email request from fundraiser

June 10th: Research teams meets with fundraiser and program administrators/faculty

July 11th: Research team delivers 12 new corporate and foundation leads to fundraiser, complete with full profiles and strategy. Research team follows up with referrals to fundraiser in CRM.

July 28th: Final referral reminders go out from CRM. Director of Prospect Research reaches out to fundraiser to ask if she needs support.

WHY DO WE MEASURE AND TRACK?

Response:

*"Please don't think we don't appreciate the amazing job you folks did. However, FoodShare is **not a priority** initiative, and often other, more pressing projects/issues arise that prevent me from working on the prospects."*

Next Steps:

Director of Prospect Research escalates matter to Executive Director.

We pull the project analytics from our weekly log where we've tracked time spent on each task related to the project.

WHY DO WE MEASURE AND TRACK?

	A	B	C
1	**Food Share Project Time Allocation**		
2			
3	**Employee Name**	**Time Taken (hh:mm)**	
4	Andrew Aslinger	14:10	
5	Jeremy Doblin	16:20	
6	Kayla Ly	10:15	
7	**Grand Total**	**40:45**	
8			
9			
10	**Activity**	**Time Taken (hh:mm)**	
11	Food Share Funding	09:00	
12	Internal - RPS Staff Weekly Meetings	01:20	
13	Other - Ad-Hoc	01:00	
14	Proactive	26:50	
15	Prospect Research Meeting	02:35	
16	**Grand Total**	**40:45**	
17			

- Allocate assignments fairly
- Identify productivity gaps and training needs
- Measure time and staff resources per project
- Track fundraiser/unit engagement
- Evaluate return on investment (ROI)
- Demonstrate value to leadership
- Improve processes and efficiency
- Support strategic planning
- Document impact over time

QUESTIONS?

DEMONSTRATING THE NEED FOR ADDITIONAL STAFF TO:

Enhance Employee Well-being

WHAT DOES EMPLOYEE WELL-BEING MEAN?

It COULD mean:

- Access to resources
- Work environment's impact on personal life
- Managing stress levels

What does it mean to you?

WHO YOU HIRE MATTERS

Hiring experienced professionals shortens onboarding, reduces long-term training time, and accelerates team impact immediately.

- Prioritize candidates with relevant prospect development or fundraising experience
- Use scenario-based interview questions to assess critical thinking and agility – personality matters!
- Look for evidence of collaboration with frontline fundraisers or campaign teams
- Evaluate adaptability, systems-thinking, and comfort with shifting priorities

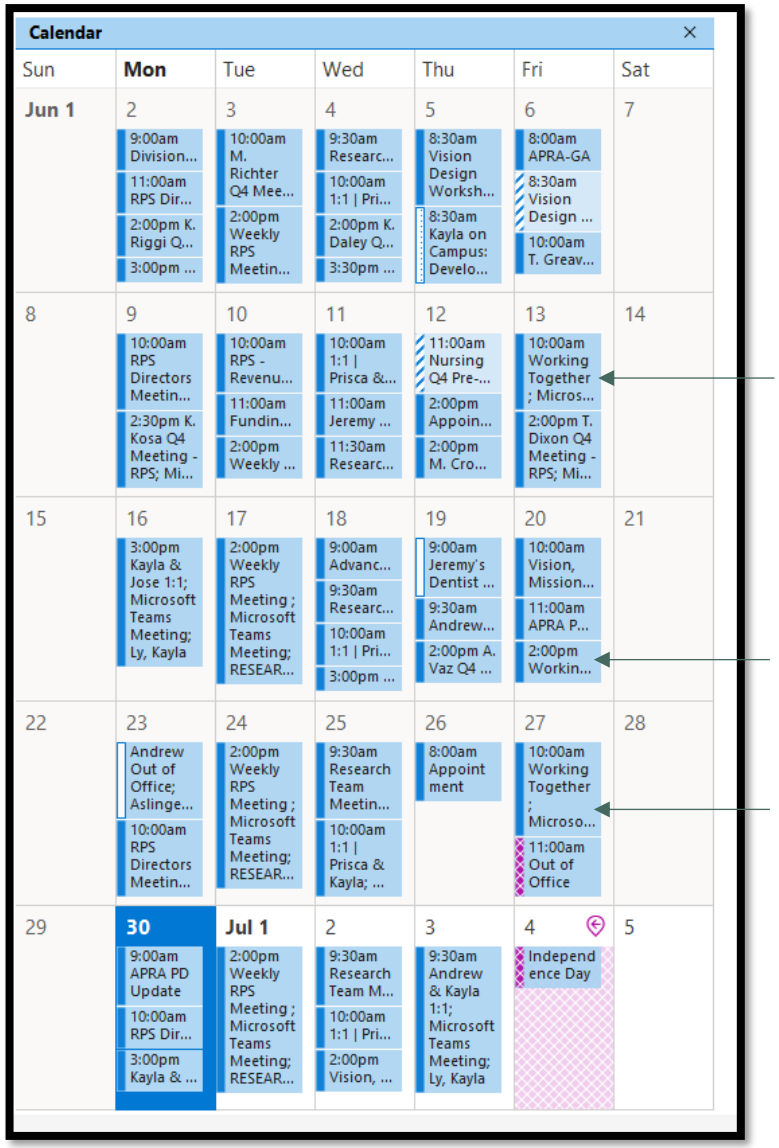
WORKING TOGETHER

AKA “Body Doubling” – a great way to engage a remote team and set aside time to work without interruptions and/or build rapport. We create connection, reduce feelings of isolation, and boost focus and productivity.

Body doubling with a remote team doesn't just help people get work done — it nurtures human connection, structure, and belonging, all of which are essential for fostering happier, more engaged employees.

Sometimes we invite others to join us so we can have intentional time with them and get to know them better/discuss pertinent topics with that person.

We very often go beyond the hour we set aside!



BI-WEEKLY STAFF CHECK-INS

Having bi-weekly one-on-ones with my team members ensures I know what they have on their plate and can check in on how they're handling their workload. We talk about upcoming leave, how they're handling projects, feedback from fundraiser meetings, career path and satisfaction, etc.

This meeting has no set agenda or time limit; some last 5 minutes and some go over an hour.

Reporting to a manager that CARES fosters an environment where employees feel safe to speak up, share ideas, and report concerns without fear of judgment or retaliation. This leads to better communication, innovation, and problem-solving.

RECAP

Start with the "Why" → Tie your staffing needs to campaign goals and strategic priorities

Quantify the Load → Use data to calculate realistic capacity and referral needs

Show the Gaps → Highlight what's at risk without added support (pipeline, burnout, delays)

Tell the Story → Use dashboards, scorecards, and visuals to demonstrate impact

Prioritize People → Hire for expertise, protect well-being, and scale intentionally

Move from Reactive to Proactive → Build systems that anticipate, not just respond

Advocate Boldly → You're not just asking for staff—you're investing in success

QUESTIONS?

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THANK YOU!

Please complete your session evaluations in the mobile app.