



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

**August 19-22, 2025**

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



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- Four years at NGS
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- Six+ years at NGS
- 12 years in prospect development





# PROST! PRoactive, STrategic research

A \$1 Billion Tool for Cultural Transformation

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



# Overview

- Where did we start? National Geographic Society Development, winter 2023
- What did we do? Test for effectiveness, brand for impact
- Results? Noticeable cultural and performance shift favoring Operations input
- More results: Build on success in response to demand - PROST-X and TIPS
- How Can I do This at my organization? Key enabling factors





# NATIONAL GEOGRAPHIC SOCIETY ADVANCEMENT, WINTER 2023

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# HERE'S THE SITUATION...

**NGS Mission:** to illuminate and protect the wonder of our world, using the power of science, exploration, education, and storytelling.

- **Funding Explorers:** invest in scientists, educators, storytellers, conservationists, and technologists who are pushing the boundaries of knowledge, conducting research, and working to solve critical global challenges.
- **Powerful Storytelling and Education:** utilize captivating narratives and educational resources to spark curiosity, empower exploration, and inspire people worldwide to care about and act on behalf of our planet.
- **Focus on Key Areas:** Ocean, Land, Wildlife, Human Histories & Cultures, Planetary Health, and Space.
- **Inspiring the Next Generation:** Through initiatives like the Slingshot Challenge and Photo Camp, provide opportunities for young people to become explorers and problem solvers.

# HERE'S THE SITUATION...

## New CEO and Chief Advancement Officer in 2020

- Fundraising previously was not strong revenue stream as compared to \$\$ from for-profit media company National Geographic Partners (Now Disney)
  - Lean investment in fundraising
  - Primarily relied on annual giving, subscriptions, organizations

## Shift towards higher ed model and staffing

- Advancement staff doubles in 3-year hiring surge as remote work grows
- New fundraising staff have less interaction with Operations
- No alumni but a powerful brand
- Built out Institutional Partnerships, Individual Giving, Annual Giving, Events teams



# HERE'S THE SITUATION...

Successful fundraising, inconsistent partnerships between fundraisers and operations

- Everyone has their own understanding of best practices
- Event bios, invitation lists, reactive requests take precedence over creating new processes

| Year | NGS Fundraising Revenue | ~Frontline Staff | ~Prospect Development Staff |
|------|-------------------------|------------------|-----------------------------|
| 2020 | \$25M                   | 10               | 1                           |
| 2021 | \$73M                   | 15               | 2                           |
| 2022 | \$119M                  | 19               | 3                           |
| 2023 | \$115M                  | 20               | 4                           |



A close-up photograph of a sloth hanging from a branch. The sloth has long, shaggy brown fur and distinctive yellowish-brown markings around its eyes. It is looking directly at the camera with a calm, steady gaze. The background is solid black, making the sloth stand out.

**QUESTIONS ON THE SITUATION?**



# TEST FOR EFFECTIVENESS, BRAND FOR IMPACT

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# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

## Identify Key Problems Leadership needs resolved

- Fundraisers will not approach cold, wealthy prospects
- Fundraisers spend too much time reviewing gift report for new prospects
- Challenging for Operations to provide input and improve processes

## Play with Tools that are available and push them and test their limits

- Workflows in Raiser's Edge NXT
- iWave Screenings
- Gift Reporting

## Make a credible case to allies and get permission to share the results

# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

## Goals and Objectives

This nascent, sustainable process would not be possible without everything Advancement Operations has done to establish a strong, reliable donor system. It has the potential to:

- Deliver steady results for impact that will strengthen Advancement confidence and strategic thinking about new prospects
- Assist Ops in asserting its role in building the pipeline
- Drive further partnerships with fundraisers and demonstrate acknowledgement of the challenges of their work by providing **warm** rather than **only** high-capacity prospects
- Build on team sharing and maximizing current available resources, systems, and expertise



# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

## Old Ways of prospecting

- Annual/one-off wealth screenings focused on wealthy zip codes, largest gifts, etc.
- Look through the daily gift report in “free” time for top donors we might not already know
- Only look at top unknown donors but not at every daily gift report
- Look through philanthropy lists to see who might be in our database

# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

**New Way** - Create a self-populating monthly donor list for screening

Raiser's Edge NXTHomeFundraisingEventsListsAnalysisToolsControl panel

Constituents

Hold for AssignmentNew list 2New list 3Ted Gift upgrade workflow

96 Constituents List updated 5 minutes ago

SaveColumnsShareExportAdd/ExcludeMoreFind in this list

Filters:Constituent code: 1 selectedAny gift: 3 selectedFundraisersConstituent typeAddressTagsClear all values

| Constituent summary         | Assign | Amount:  | Lifetime giving | Latest gift                   | Prospect status | Last action   | Next action | First gift                    | NGS Rating |
|-----------------------------|--------|--|-----------------|-------------------------------|-----------------|---|-------------|-------------------------------|------------|
|                             |        | Greater than or equal to \$500.00  | \$500           | \$500                         |                 | None  | None        | \$500                         |            |
|                             |        | Date: 1/1/2024 to 1/31/2024  |                 | one-time gift 1/31/2024       |                 |   |             | one-time gift 1/31/2024       |            |
|                             |        | Fund: Any of: 125th Campaign 3.5% Gift Fee: NGS20-42000-201-10154, African Wildlife: NGS20-42000-201-10277, AI for Earth Innovation Grant Program: NGS20-42000-201-10174, Base Camp - Outdoor Immersive Audio Experiences: NGS20-42000-201-10246, Base Camp Maintenance Fund: NGS20-42000-201-10258, Base Camp Project Fund: NGS20-42000-201-10163, Bio-Cat Science F... |                 | Unrestricted: NGS20-42000-201 |                 |   |             | Unrestricted: NGS20-42000-201 |            |
| Fidelity Brokerage Services |        |  | \$407K          | \$100                         |                 | Mailing - Steward - Acknowledgement 1/16/2024 ✓ 1/16/2024 | None        | \$100                         |            |
|                             |        |  |                 | one-time gift 3/8/2024        |                 |   |             | one-time gift 9/26/2016       |            |
|                             |        |  |                 | Unrestricted: NGS20-42000-201 |                 |   |             | Unrestricted: NGS20-42000-201 |            |

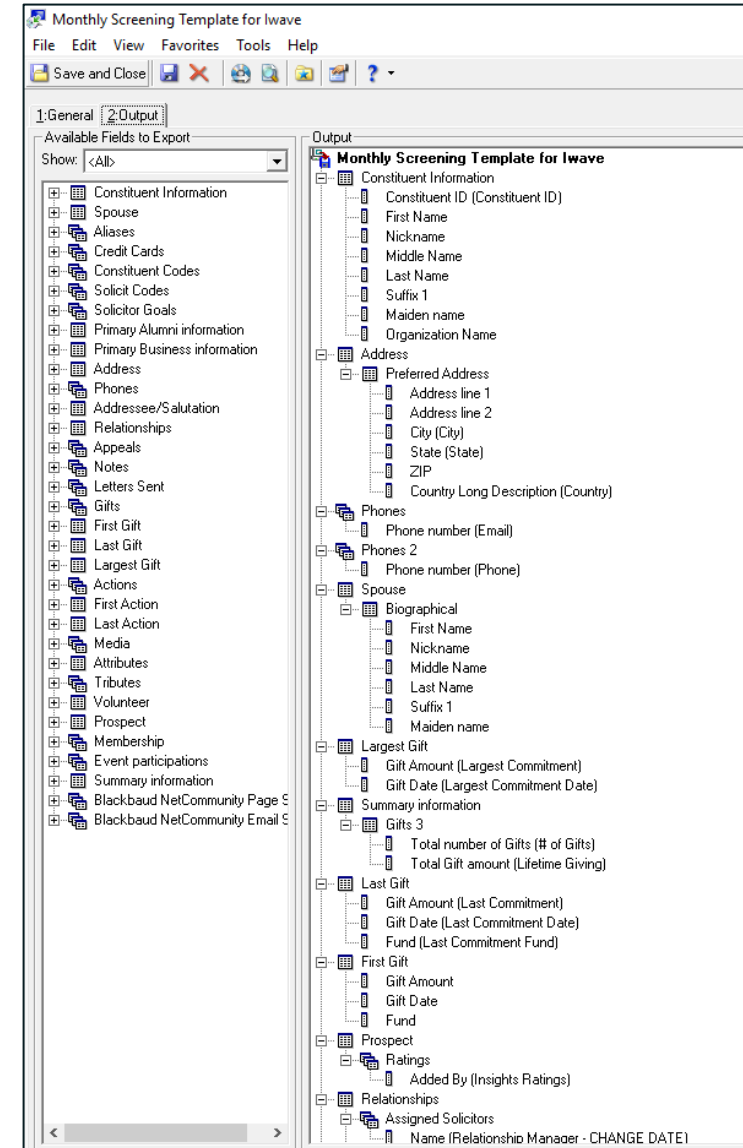


# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

**New Way** – Create sustainable template for simplified, consistent export that aligns with vendor screening requirements (address, lifetime giving, etc.)

Filter out: Already assigned or known to us (no former trustees, etc.), LEX, rural or international, incomplete information, organizations, etc.



# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

**New Way** – export from database into template, submitting one simple monthly screening

iwave

Smart Search

Screening

Profiles

Prospect Lists

Data Sources

Alerts

Customize

More

Screening

Search Results

5 Filters

Unique Screening ID

iWave Score

Propensity

Affinity

Capacity

Search

Clear

February Monthly Screening Pilot

Submitted: 02/29/2024   Confidence: 4.1   Total Capacity: \$58,708,826   Prospecting Affinity: Environment (General) / Arts - Museums

Share Project

Create Profile

Export

Download Summary

Multi-Lens Models

Back to Pro

| <input type="checkbox"/> | Name       | iWave Score | Propensity | Affinity | Primary Affinity | Secondary Affinity | Capacity | Capacity Score Range  | RFM Score | In    |
|--------------------------|------------|-------------|------------|----------|------------------|--------------------|----------|-----------------------|-----------|-------|
| <input type="checkbox"/> | [REDACTED] | 4           | 4          | 4        | 4                | 4                  | 4        | \$750,000+            | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 4           | 4          | 3        | 2                | 4                  | 4        | \$750,000+            | 2         | + Cre |
| <input type="checkbox"/> | [REDACTED] | 4           | 4          | 4        | 4                | 4                  | 4        | \$750,000+            | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 4           | 4          | 2        | 1                | 3                  | 4        | \$750,000+            | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 3           | 4          | 1        | 2                | 1                  | 4        | \$750,000+            | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 2           | 1          | 1        | 1                | 1                  | 4        | \$750,000+            | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 3           | 4          | 2        | 1                | 4                  | 3        | \$500,000 - \$750,000 | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 3           | 4          | 1        | 1                | 1                  | 3        | \$500,000 - \$750,000 | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 3           | 4          | 3        | 4                | 3                  | 2        | \$100,000 - \$500,000 | 2         |       |
| <input type="checkbox"/> | [REDACTED] | 3           | 4          | 2        | 3                | 1                  | 2        | \$100,000 - \$500,000 | 2         |       |





# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

Research ONLY the top unknown donors from ALL of the daily gift reports

| I              | J   | K                | L         | M            | N                 | O              | P          | Q     | R                   | S                  | T   | U                    | V            |
|----------------|-----|------------------|-----------|--------------|-------------------|----------------|------------|-------|---------------------|--------------------|---|----------------------|--------------|
| Constituent ID | Su  | CnAdrPrf_AdrLine | CnAdr     | CnAdrPrf_ZIP | City              | State/Province | Home Phone | Email | Est. Capacity Value | New Rating         | NOTES   | Suggested Assignment | Largest Gift |
| X0038321584    |     | XXXXXX           |           | 21204-6423   | Ruxton            | MD             |            | 0     | \$ 7,289,461        | C: \$10M - \$24.9M | 86 - heiress has made an 8 figure gift and several 7-figure gifts   | Kara or Ally         |              |
| 201415962      |     | XXXXXX           |           | 90049        | Los Angeles       | CA             |            | 0     | \$ 4,515,150        | G: \$500K - \$999K | 87 - made a \$500K+ gift to a hospital  | Emma                 |              |
| MD720041       |     | XXXXXX           |           | 94301-3644   | Palo Alto         | CA             |            | 0     | \$ 3,901,407        | B: \$25M - \$49.9M | 83 - Made \$40M+ gift in past - retired hedge funder  | Kara or Emma         |              |
| 20226085       |     | XXXXXX           | Apt. D    | 10012-4325   | New York          | NY             |            | 0     | \$ 3,541,753        | E: \$2.5M - \$4.9M | very philanthropic, home \$12M, made \$100K+ gift, financial restructuring, email                                 | Kara                 |              |
| 202128647      |     | XXXXXX           |           | 33316-1400   | Ft. Lauderdale    | FL             |            | 0     | \$ 2,799,951        | E: \$2.5M - \$4.9M | performing arts interest, FL commercial real estate   | Alice                |              |
| 202240156      |     | XXXXXX           |           | 12572-1965   | Rhinebeck         | NY             |            | 0     | \$ 2,160,126        | D: \$5M - \$9.9M   | Countess and heiress in? Southampton, home assessed \$16M, has \$5M science/conservation focused foundation, only |                      |              |
| 201210926      |     | XXXXXX           |           | 76262-4820   | Westlake          | TX             |            | 0     | \$ 1,457,894        | F: \$1M - \$2.49M  | no  |                      |              |
| 201632510      |     | XXXXXX           |           | 11568-1212   | Old Westbury      | NY             |            | 0     | \$ 1,368,947        | F: \$1M - \$2.49M  | no  |                      |              |
| 20192877       |     | XXXXXX           |           | 81611-9701   | Aspen             | CO             |            | 0     | \$ 1,305,281        | C: \$10M - \$24.9M | Dow Jones heir and philanthropist 77  | Kara                 |              |
| 115602         |     | XXXXXX           |           | 27104-1947   | Winston Salem     | NC             |            | 0     | \$ 1,140,279        | H: \$250K - \$499K | no 2 properties \$5M+   |                      |              |
| 201531158      |     | XXXXXX           |           | 29455        | Kiawah Island     | SC             |            | 0     | \$ 1,000,000        | \$2.5M - \$4.9M    | Former Lawyer for the U.S. presidency called NGS in 2024  | Alice                |              |
| 20192484       |     | XXXXXX           |           | 75252-2324   | Dallas            | TX             |            | 0     | \$ 966,144          | J: \$50K - \$99K   | no  |                      |              |
| 20221944       |     | XXXXXX           |           | 77380        | The Woodlands     | TX             |            | 0     | \$ 948,028          | K: \$25K - \$49K   |   |                      |              |
| 201518144      |     | XXXXXX           |           | 45213-2420   | Cincinnati        | OH             |            | 0     | \$ 919,608          | K: \$25K - \$49K   |   |                      |              |
| 201826594      |     | XXXXXX           |           | 94563-0583   | Orinda            | CA             |            | 0     | \$ 907,712          | J: \$50K - \$99K   |   |                      |              |
| 201635346      |     | XXXXXX           |           | 19067        | Yardley           | PA             |            | 0     | \$ 832,958          | B: \$25M - \$49.9M | 86 - has made past \$25M and and \$80M (named sustainable energy center) gifts                                    | Kara or Ally         |              |
| 2019214784     |     | XXXXXX           |           | 94301-3105   | Palo Alto         | CA             |            | 0     | \$ 798,659          | G: \$500K - \$999K | foundation assets \$136M  | Filiz                |              |
| 201806034      |     | XXXXXX           |           | 34108-8172   | Naples            | FL             |            | 0     | \$ 788,554          | I: \$100K - \$249K | Stanford Top professor - 2 properties \$7M+   |                      |              |
| 20212692       |     | XXXXXX           |           | 34119        | Naples            | FL             |            | 0     | \$ 785,369          | H: \$250K - \$499K | home \$3.3M   |                      |              |
| 201535530      |     | XXXXXX           |           | 63112        | Saint Louis       | MO             |            | 0     | \$ 756,087          | G: \$500K - \$999K | 87.3 properties assessed at \$6M+.  | emma                 |              |
| 202325565      |     | XXXXXX           |           | 90272-2357   | Pacific Palisades | CA             |            | 0     | \$ 736,648          | F: \$1M - \$2.49M  | cumulative property \$11M. Foundation assets \$3.6M but not \$50K+  | Jordan maybe         |              |
| 202333060      | Jr. | XXXXXX           |           | 78526-9454   | Brownsville       | TX             |            | 0     | \$ 699,798          | no                 |   |                      |              |
| 202335601      |     | XXXXXX           |           | 91105        | Pasadena          | CA             |            | 0     | \$ 697,497          | E: \$2.5M - \$4.9M | properties assessed \$5M+. Marsh McLennan Managing Director.  | Jordan maybe         |              |
| 201110008      |     | XXXXXX           |           | 84060-1249   | Park City         | UT             |            | 0     | \$ 690,445          | E: \$2.5M - \$4.9M | no not philanthropic enough   |                      |              |
| 201604515      |     | XXXXXX           | Suite 200 | 2025         | Cohasset          | MA             |            | 0     | \$ 686,039          | F: \$1M - \$2.49M  | no  |                      |              |
| 202212843      |     | XXXXXX           |           | 95060        | Santa Cruz        | CA             |            | 0     | \$ 670,588          | H: \$250K - \$499K | no  |                      |              |
| 20211760       |     | XXXXXX           |           | 78681        | Round Rock        | TX             |            | 0     | \$ 668,250          |                    | no  |                      |              |
| 202032402      |     | XXXXXX           |           | 02806-4424   | Barrington        | RI             |            | 0     | \$ 661,319          |                    | no  |                      |              |
| 201707227      |     | XXXXXX           |           | 90066-4617   | Los Angeles       | CA             |            | 0     | \$ 660,105          |                    | no  |                      |              |
| 2019153488     |     | XXXXXX           |           | 92211-2704   | Palm Desert       | CA             |            | 0     | \$ 644,147          |                    | no  |                      |              |
| 201653262      |     | XXXXXX           |           | 29439-1074   | Folly Beach       | SC             |            | 0     | \$ 632,441          |                    | no  |                      |              |
| 201604670      |     | XXXXXX           |           | 93110        | Santa Barbara     | CA             |            | 0     | \$ 630,959          | C: \$10M - \$24.9M | Social Impact billionaire family  | Kara                 |              |
| 202216730      |     | XXXXXX           |           | 2138         | Cambridge         | MA             |            | 0     | \$ 618,846          | H: \$250K - \$499K | no  |                      |              |
| 201879445      |     | XXXXXX           |           | 10024        | New York          | NY             |            | 0     | \$ 605,963          | C: \$10M - \$24.9M | pharma board chair did ecology project  | should be Kara       |              |
| 201827537      |     | XXXXXX           |           | 20854        | Potomac           | MD             |            | 0     | \$ 573,945          | G: \$500K - \$999K | Darden grad/donor, head of capital children program, education interest   | tbd                  |              |



# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As presented to Operations and then Fundraisers in April 2024:

Sample top results – donors to NGS in 2024 who were not known to NGS and would not have been engaged by MG or PG RMs:

- Unnamed billionaire gave away \$172M in 2023
- Famous shoe company founder/CEO
- Member of Forbes billionaire Gallo wine family
- Member of Rockefeller family
- Bank chairmen, hedge funders, venture capitalists, etc.



# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

## Sample Communication in delivering PROST! Results

Hi Fundraiser!

As part of Ops continuing to contribute to the pipeline, I'm reaching out to let you know we have more highly rated, warm donors from PROST! 🥂 that have been assigned to you for outreach and qualification.

These are individual donors who recently gave at least \$500, are not a LEX gift, and appear to reside in areas generally within your region.

As a reminder, an extra effort was made to find contact information and other details which should be enough for qualification.

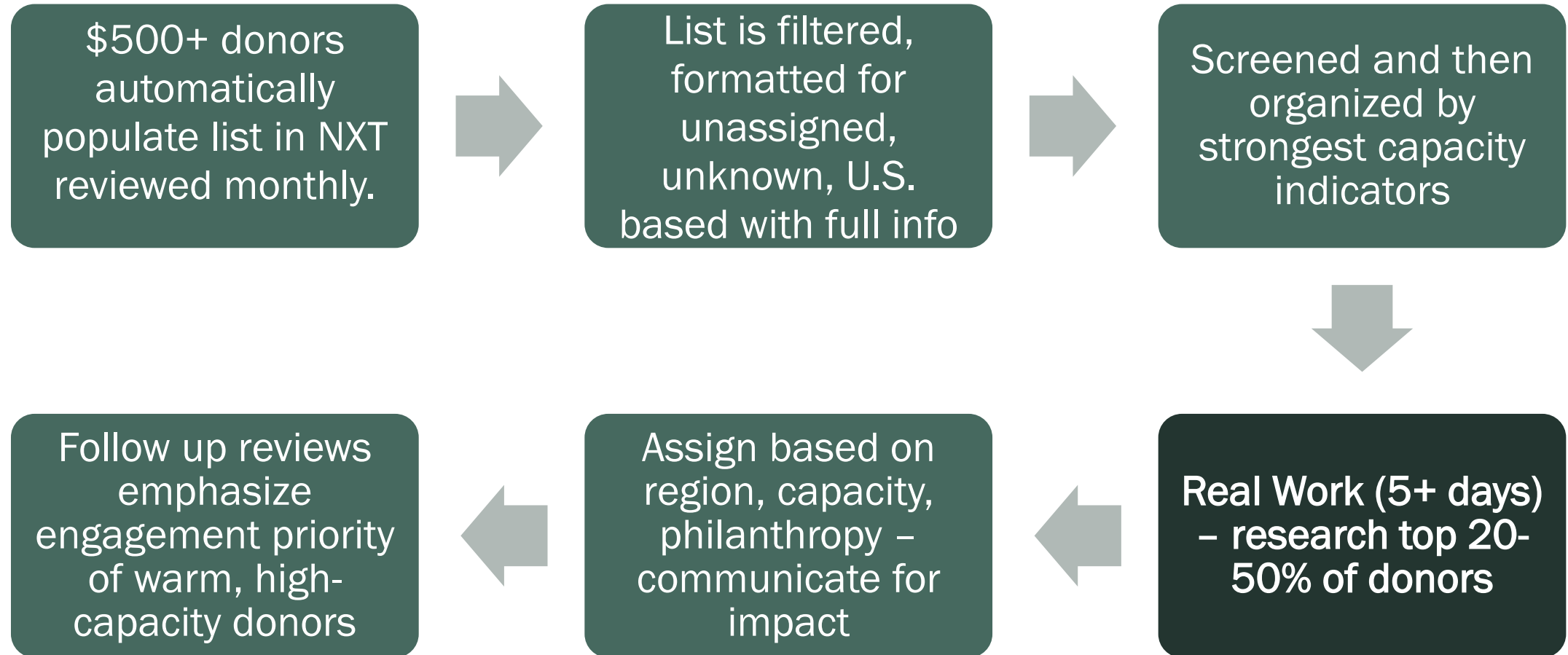
In tandem with consistent portfolio reviews and thoughtful engagement, we hope new prospects like these will help set you up to crush your 2025 goals!

| Constituent ID | CnBio_First_Nam | CnBio_Last_Nam | City       | Sta | Notes  |
|----------------|-----------------|----------------|------------|-----|--|
| 20222540       |                 |                | New York   | NY  | C: \$10M - \$24.9M NY Real Estate Developer                                  |
| 202329325      |                 |                | Fort Myers | FL  | E: \$2.5M - \$4.9M emails in notes - doctor with foundation                  |
| 202429989      |                 |                | Durham     | NC  | B: \$25M - \$49.9M computer company founder - \$200K to Emma - already spoke |



# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

Quick review of what we just covered. . .





# CREATING A PRINCIPAL GIFT PIPELINE PROCESS

As of June 2025:

Output - added capacity of PROST!-identified donors

- 2,120 donors in 18 screenings since Winter 2023

| Over \$730M in Rated Donors Identified (excludes prospects) |                   |                   |                 |                   |                  |                   |                   |                   |                 |
|---|-------------------|-------------------|-----------------|-------------------|------------------|-------------------|-------------------|-------------------|-----------------|
| \$50M+  | \$25M-<br>\$49.9M | \$10M-<br>\$24.9M | \$5M-<br>\$9.9M | \$2.5M-<br>\$4.9M | \$1M-<br>\$2.49M | \$500K-<br>\$999K | \$250K-<br>\$499K | \$100K-<br>\$249K | \$50K-<br>\$99K |
| 5   | 8                 | 14                | 27              | 38                | 32               | 15                | 30                | 36                | 28              |

Impact – 41 total fundraiser solicitations totaling \$4.9M

| Solicitations | Status                | Total \$\$ |
|---------------|-----------------------|------------|
| 10            | Funded                | \$142K     |
| 6             | Closing               | \$760K     |
| 16            | Planning              | \$2.5M     |
| 9             | Withdrawn or Declined | \$355K     |







**QUESTIONS ON TESTING & BRANDING?**



# A CULTURAL SHIFT. . .

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# FUNDRAISERS: I LOVE PROST! WHAT ELSE CAN YOU GIVE ME?

By mid-2024, regular monthly sharing and assignment of 15 - 30 highly-rated, warm prospects, grouped by region and capacity

- Delivered for impact with powerful, consistent messaging

Consistent positive feedback from fundraisers whose previous pipeline relied far more heavily on events and introductions

- Giving from PROST-identified donors increased over 100 per cent due to the personalized outreach they received from fundraisers

Greater regular participation of prospect development staff in strategy meetings and discussions on elite prospect engagement

- Better overall integration of operations and frontline staff drives higher performance



# FUNDRAISERS: I LOVE PROST! WHAT ELSE CAN YOU GIVE ME?

Fundraisers became receptive to operations input, seeing fewer but better prospects, improving efficiency and maintaining high performance

- 1,041 visits, a decrease of 20% over 2023 (1,294)
- Closed 330 gifts, a 13% increase over 2023 (293) with fewer frontline staff

| Year | NGS Fundraising Revenue | ~Frontline Staff | ~Prospect Development Staff |
|------|-------------------------|------------------|-----------------------------|
| 2020 | \$25M                   | 10               | 1                           |
| 2021 | \$73M                   | 15               | 2                           |
| 2022 | \$119M                  | 19               | 3                           |
| 2023 | \$115M                  | 20               | 4                           |
| 2024 | \$112M                  | 16               | 4                           |

# FUNDRAISERS: I LOVE PROST! WHAT ELSE CAN YOU GIVE ME?

Fundraising performance improves overall in 2024. We believe this correlates to improved integration of operations input into frontline activity – PROST! assisted with that integration.

- 105 \$100K+ gifts, a 30% increase over 2023 (81)
- 24 \$1M+ gifts, a 50% increase over 2023 (16)
- 18 Principal Donors Society members added in 2024, 64% increase over 2023 (11)
- Hubbard & Clark Council (MG+ Giving Societies) 38% membership increase over 2023 – Four of these identified via PROST!





**QUESTIONS ON SHIFTING CULTURE?**



# FOLLOW-ON SUCCESSES

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# PROST-X AND TIPS

PROST! is elevated for Advancement and NGS leadership - PROST-eXpress, or PROST-X

- Approval chain for time sensitive CEO-level response carefully coordinated
- Leaders wanted PROST! prospects – demand from top after bottom-up success
- Criteria of \$5M+ rating, gave \$500 within past month
- Donors receive automated/targeted thank you/engagement email from leadership based on assessed interests
- Portfolio assignment and follow up for a two-month period, then dropped or reassigned

# PROST-X AND TIPS

TIPS was created for Advancement and NGS leadership - (Targeted Information on ProspectS)

- Due to leadership complaint about missed engagement opportunity
- Highlights up-to-the-minute new information on prospects known to us
- Approval chain for PROST-X mirrored along with team meeting
- Used process to highlight (1) inefficiencies of news alerts for high level prospects that would overload inboxes and (2) that our team with current staff cannot support all senior leadership engagement if it is not shared with us in a consistent way
- Process fully approved and appreciated by leadership – no requests yet 😂



**QUESTIONS ON FOLLOW-ON SUCCESSSES?**



# KEY TAKEAWAYS

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# COULD I DO THIS AT MY ORGANIZATION?

Maybe not exactly, but you can mirror the key concepts.

- (1) Go find out what leadership truly says it needs. Integrate it into your work
- (2) Meet non-data and non-process people at their level. Culture shifts sloooowly.
- (3) Identify key stakeholders and consider how new ideas may not benefit everyone equally before introducing ideas.
- (4) Work hard AND work smart. Perform at a high level to earn the permission to play with and test systems and tools your organization may already have that can scale in ways other longtime users have not imagined.
- (5) Grasp firmly to opportunities to highlight the impact of your work. Make it simple, memorable, sustainable.





**THOUGHTS?**



# THANK YOU!

Please complete your session  
evaluations in the mobile app.





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