



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

A Stardew Valley Approach to Discovery Management

PLANTING THE SEEDS OF PHILANTHROPY

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



BEKI HODGMAN
DIRECTOR OF PROSPECT MANAGEMENT
WESTERN MICHIGAN UNIVERSITY

5 years in development
2 kids – Maddie and Jack
Married for 23 years

Things I love:

Living in Michigan! Yes, even the snow!

Good Mythical Morning

Eating and cooking adventurously

Planning elaborate games

Introverting



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WHAT IS DISCOVERY?

AND

WHAT IS STARDEW VALLEY?

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WHAT IS DISCOVERY?

Discovery work refers to the process of identifying, researching, and qualifying potential donors to determine their capacity, inclination, and readiness to give. This is often the first stage in the donor engagement pipeline.

Discovery can be

- A qualifying outreach to a donor or prospect
 - Grateful patient
 - Annual fund donor
 - First time donor
 - Follow up with an event attendee
 - Investigating an untapped pool

WHAT IS STARDEW VALLEY?

Stardew Valley is a popular farming simulation and role-playing game in which players inherit a run-down farm and work to restore and customize it.

Developed by ConcernedApe, the game allows players to grow crops, raise animals, mine for resources, fish, craft goods, and build relationships with villagers in the nearby town of Pelican Town.



A large part of the game is discovery work. For each village resident, I need to:

- Find out what gifts they like AND dislike
- Speak to them regularly
- Participate in festivals
- Complete requests and side quests
- Unlock their backstory

	Penny (single)		 <input type="checkbox"/> <input checked="" type="checkbox"/>
	Jodi		 <input type="checkbox"/> <input type="checkbox"/>
	Robin		 <input type="checkbox"/> <input type="checkbox"/>
	Willy		 <input type="checkbox"/> <input checked="" type="checkbox"/>
	Caroline		 <input type="checkbox"/> <input type="checkbox"/>


The ultimate goal of my outreach is securing the gift of friendship (or marriage)!

When villagers become my friend, they give me gifts and share information with me.



STARDEW VALLEY + FUNDRAISING?

Discovery the Stardew Valley Way:

- Personalized, targeted
- Focus on a small group, community
- Lots of interaction at a quick pace
- Relationships level-up 

Today I want to share with you how we used these same ideas to reinvent the way do discovery work at WMU.

THE WAY IT WAS
OR
*HOW I INHERITED A
RUN-DOWN OLD FARM*

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THE WAY IT WAS

Discovery 2020-2022 (The run-down old farm)

- Gift officers assigned between 200-225 prospects in a discovery portfolio
- Assignments based on likelihood scores from a predictive model
- Gift officers were expected to reach out to these prospects, but the method and frequency was left undefined (...when you have time).
- Assignments were not researched or cross-checked (a very cut and paste approach)

THE WAY IT WAS – THE RESULTS

Discovery 2020-2022 (The run-down old farm)

- The results of these assignments were varied and not well-tracked.
- From my research, I was able to find 11 qualifications over the 2-year period.
- Rate of qualification = 0.05%



COLLABORATION AND
BRAINSTORMING
OR
CLEANING UP THE FARM

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CLEANING UP THE FARM

Discovery Revamp

- Collaboration with AVP of Major Gifts and Director of Leadership Gifts
 - Reached out to other institutions to see how they were doing discovery work
 - Brainstorming sessions led us to decide we needed:
 - A framework for gift officers to follow
 - A clear start and stop
 - What gets measured gets managed – add discovery work to annual goals
 - Deliberate and intentional assignments
 - Systemize the qualification

CLEANING UP THE FARM

Discovery Revamp – The Framework

- 15 prospects
- 6 weeks
- 8 personalized touches per prospect over the 6 weeks
- A total of 120 potential touches over the cycle

CLEANING UP THE FARM

Discovery Revamp – The Framework

- Prospects sourced from highest scoring in likelihood model
 - We have partnered with BWF on building these models for us
- Prospect Management vets and researches before cycle begins
 - Updated contact and employment information
 - Updated wealth screening
 - Review to understand when/if they have been previously assigned

CLEANING UP THE FARM

Discovery Revamp – The Framework

- Systemized the qualifications by creating a promotion button in Salesforce
 - Once qualified, gift officers would have the power to promote discovery prospects into their primary portfolio. An Opportunity (or proposal) would automatically open.
 - This was accomplished by our Advancement Services team.
 - Alternatively, if disqualified, gift officers would have the power to eject prospects back into the general pool.

CLEANING UP THE FARM

Discovery Revamp – The Framework

- Created a method of tracking the work

Prospect Name	Week 1: March 2 - March 8						Week 2: March 9 - March 15						Week 3:		
	Email	SM	Phone	Text	Vist	Letter	Email	SM	Phone	Text	Visit	Letter	Email	SM	Ph
Harvey	1							1					EJECTED		
Haley	1							1			1	EJECTED			
Elliott	1						1						EJECTED		
Mayor Lewis			1					1					EJECTED		
Krobus	1							1					EJECTED		
Leah	1							1					1		
Linus	1						1						1		
Robin	2						1				1	EJECTED			
Marnie	1							1					1		
Sam	1	EJECTED													
Shane	1							1					1		
Clint	1							1					1		
George	1						1						1		
Sebastian	1							1					1		
Demetrius	PROMOTED														
Wizard	1						1						1		



Prospect Name	Week 5: March 30 - April 5						Week 6: April 5 - April 12								
	Email	SM	Phone	Text	Visit	Letter	Email	SM	Phone	Text	Visit	Letter	Complited Outreach	Expected Outreach	Percentage Completed
Harvey													2	2	100.00%
Haley													3	3	100.00%
Elliott													2	2	100.00%
Mayor Lewis													2	2	100.00%
Krobus													2	2	100.00%
Leah	1					1			1				8	8	100.00%
Linus	1					1			1				9	8	112.50%
Robin													4	4	100.00%
Marnie	1					1			1				8	8	100.00%
Sam													1	1	100.00%
Shane	1					1			1				8	8	100.00%
Clint	1					1			1				8	8	100.00%
George	1					1			1				8	8	100.00%
Sebastian	1					1			1				8	8	100.00%
Demetrius													0	0	100.00%
Wizard													7	7	100.00%
SUMMARY													80	79	101.27%



IMPLEMENTATION AND
RESULTS
OR
*DID WE SAVE PELICAN
TOWN??*

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IMPLEMENTATION

- **We began Cycle 1 on November 6, 2023 with 9 gift officers participating**
 - 58% of expected outreach was completed
 - 7 meetings secured, 8 prospects disqualified, 11 promoted. \$60,000 in new gifts (eventually) closed.
- **Buy in from gift officers was...slow overall**
 - A realization that metrics would be affected
 - A champion on the inside
 - Lots of communication and updates
- **Support from managers was critical**
 - Gave me space to speak to fundraiser team consistently
 - Communicated the importance of discovery work in 1:1s

IMPLEMENTATION









- **Cycle 2**
 - 87% of expected outreach was completed
 - 3 meetings secured, 9 prospects disqualified, 17 promoted. \$535,000 in new gifts closed from those promoted.
- **Cycle 3 – grew to 10 gift officers participating**
 - 54% of expected outreach was completed
 - Every time we added new gift officers, the completed outreach went down a bit.
 - 6 meetings secured, 17 prospects disqualified, 10 promoted. \$51,000 in new gifts closed from those promoted.

IMPLEMENTATION

- **With each cycle, we added more teams of gift officers including:**
 - Planned giving team with focus on prospects scoring high in the planned gift likelihood model
 - We partnered again with BWF to build this model for us.
 - Leadership giving team with focus on prospects scoring high in the leadership gift likelihood model
 - We partnered again with BWF to build this model for us.
 - Principal gift team with focus on disconnected high net worth prospects
 - We partnered with Wealth X to identify high net worth prospect.
 - WMed team with focus on the local medical community
 - Athletics team with focus on those close to the next level of their athletic support tiers

IMPLEMENTATION

- **With each cycle, we made modifications and improvements:**
 - Provided gift officers with a suggested schedule of outreach. A 6-week calendar with outreach suggestions is provided to each gift officer at the start of the cycle.
 - Added a 2 week break in-between cycles.
 - Added participants. Along the way, we have added Athletics, Gift Planning, Principal Gifts, WMed, and Leadership and Digital gift officers (whose discovery prospect assignments all employ different strategies).
 - Onboarding. We have added a discovery training session for all our new gift officers.

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
 		 			
Jan 6-10 (2 actions)	Jan 13-17 (1 action)	Jan 20-24 (2 actions)	Jan 27-31 (1 action)	Feb 3-7 (1 action)	Feb 10-14 (1 action)
Personalized Intro Email + Social Media (If no Social Media, replace with other action)	Follow-Up Email	Phone Call + Follow-Up Email	Personalized WMU Interest Update (Email or LinkedIn)	Personalized Handwritten Note	Phone Call



RESULTS TODAY

Cycle	# Gift Officers	% Outreach Complete	# Promoted	# DQ	# Pending Proposals	Dollars Closed
1	9	58%	11	8	4	\$60,000
2	8	87%	17	9	5	\$535,232
3	10	54%	10	17	7	\$51,000
4	11	70%	18	12	10	\$97,451
5	15	65%	16	46	11	\$11,116
6	15	84%	22	45	11	\$52,001
7	18	72%	19	53	11	\$173,300
8	15	79%	12	53	9	\$36,450



RESULTS TODAY

Cycle	# Gift Officers	% Outreach Complete	# Promoted	# DQ	# Pending Proposals	Dollars Closed
9	16	90%	41	45	37	\$2,100
10	15	84.5%	22	53	27	\$13,025



RESULTS TODAY

- The discovery strategy implemented in November 2023 has proven to be very successful!
 - **Dollars Pending: \$2,644,316.** There are 106 open Opportunities from prospects in cycles 1-9. 64% of them have no targeted amount thus far.
 - **Dollars Closed: \$1,368,654.21**
 - **Qualified: 167**
 - **Disqualified: 288**
 - **Meetings Completed (in-person/virtual): 152**

WHAT'S NEXT FOR
DISCOVERY?

OR

*EXPLORING NEW AREAS
AND
MAKING NEW FRIENDS!*

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DISCOVERY 2.0

- **This past May, we decided to try a new cadence of outreach**
 - 20 prospects per gift officer
 - 12-week cycle
 - 14 personalized touches over the 12 weeks.
 - The Results – we'll see soon!
- **With the framework in place, we are planning to experiment with types of assignments**
 - Kellanova example – retirees with stock to transfer
 - Larger discovery portfolios for new gift officers instead of unqualified primary assignments
 - Discovery for Alumni Relations

DISCOVERY 2.0

- **Discovery – Getting Us More Than *JUST* Dollars**
 - Placing disconnected Aviation alumni with our digital gift officer has opened the opportunity to connect that community with him as their point person.
 - Placing ROTC alumni with a leadership gift officer has helped to build bridges with that segment and their campus leaders.
 - Celebrating Discovery promotions at gift officer meetings has helped to build comradery and excitement around the process.
 - Providing quality leads on a consistent basis through this process has helped to build trust between Prospect Management and the gift officer teams.

**THANK YOU FOR
JOINING ME!
HAPPY FARMING!**



THANK YOU!

Please complete your session
evaluations in the mobile app.

