



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

Turning Portfolio Reviews into Fundraising Strategy

REELING IN RESULTS



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

ABOUT ME



Krystal Wilson, Ed.D.

- Assistant Director of Prospect Management & Research, Appalachian State University
- 18 years strong with AppState
- Mom/Chauffeur/Navigator of teenage adventures
- Passionate about event planning, gardening, and keeping up with three mischievous pups
- Known for balancing analytics with creativity
- Enthusiastic team collaborator and workplace visionary

EXPLORE
PD25
New Depths



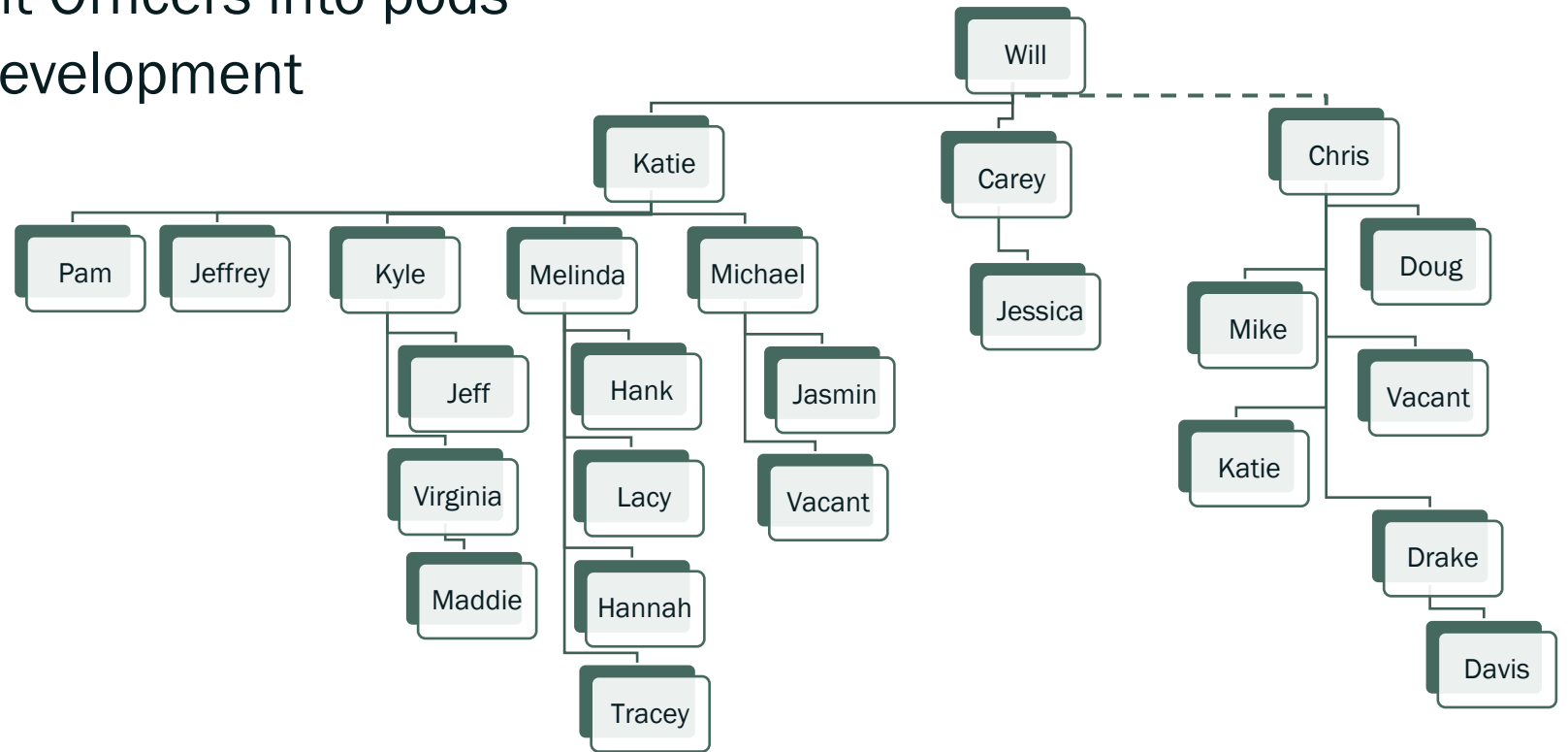
HAVE YOU HAD A MEETING LIKE THIS?

Name	Employment	Rating	Last Contact Date	Last Contact DO & Type	Last Transaction Amount	Last Transaction Area	Last Transaction Date
Albus Dumbledore	Headmaster, Hogwarts School	\$50K-99K	6/7/25	Sally McSally, Email	\$1,500	Fermentation Sciences	12/20/24
Cruella de Vil	Fashion Designer	\$100K-249K	4/4/25	Sally McSally, Phone	\$15,000	Vet Tech	1/15/25
Carlisle Cullen	Traveling Doctor	\$1M-2.49M	5/5/24	Sally McSally, Email	\$2,000	Biology	2/23/15
Barbie	All	\$500K-999K	3/29/23	Sally McSally, Text	\$100,000	Women Entrepreneurship	6/1/25



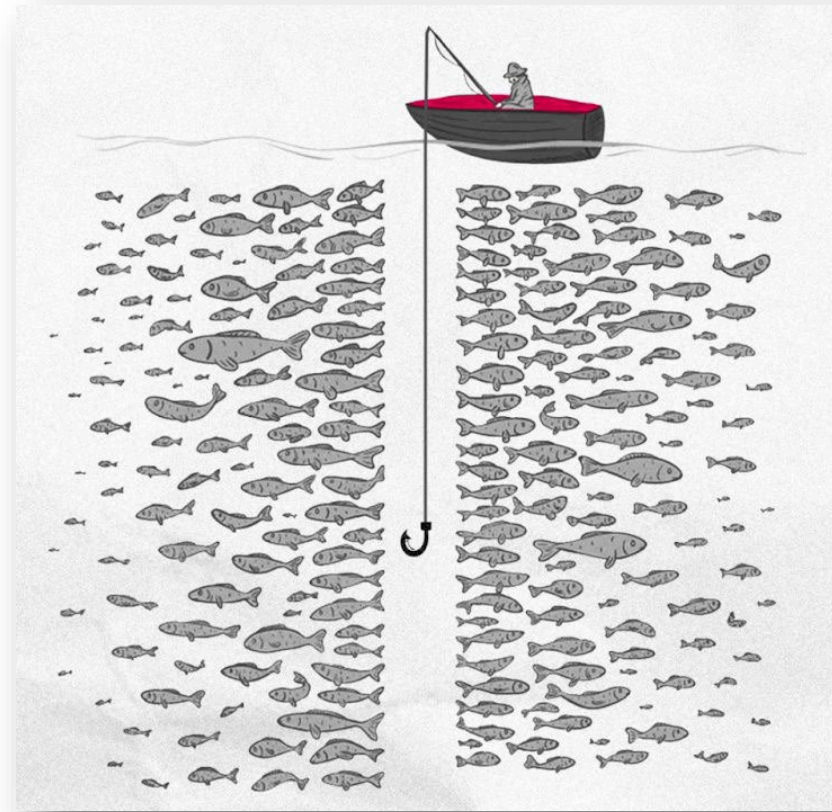
CONTEXT

- Our Team's Structure
 - 25 Development Officers into pods
 - 2 in Prospect Development



TRIAL AND ERROR

- Portfolio Meetings
 - Metric – focused
 - Prospects, Plans, & Priorities
 - Insights & Strategy
 - Frequency



THE DREAM MEETING

participative respect
intentional
brainstorming
strategy ideas
data partnership
conversation
insights
expectations

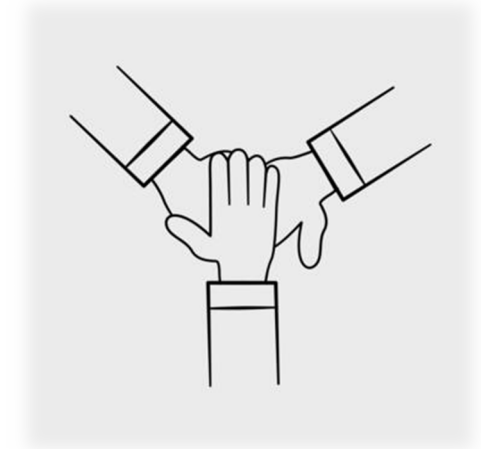


MEETING



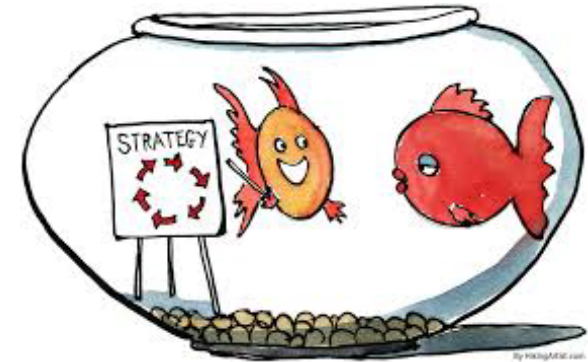
PARTICIPATIVE LEADERSHIP

- Pitched ideas to VC and AVC
 - Prepared template of the rebranded portfolio strategy meeting
 - Advocated for their support in setting expectations
- Met with team leads
 - Shared approved template and asked for feedback
 - Discussed their involvement
- Launched new style in team leads' meetings
 - Showed the data
 - Shared the value



THE REBRANDING

- Portfolio Meeting to Portfolio Strategy Meeting
- Clear expectations
- Inclusion of team leaders
- Tailored insights with a creative flair
- Ask clarifying questions
- Be “in the know”



PREPARATION

- Review the portfolio – look for trends, outliers, issues, etc.
 - Does the DO have enough prospects to meet their goals?
 - Does the DO have too many prospects?
 - Is the portfolio filled more with lower rated prospects?
 - Is the portfolio balanced?
 - Are prospects moving in the cultivation cycle? Have they been contacted?
 - Is there anything that should be the focus for the meeting?
 - TIP: Reach out to team leader beforehand and discuss

PREPARATION 2.0

Should DOs prepare for portfolio strategy meetings?

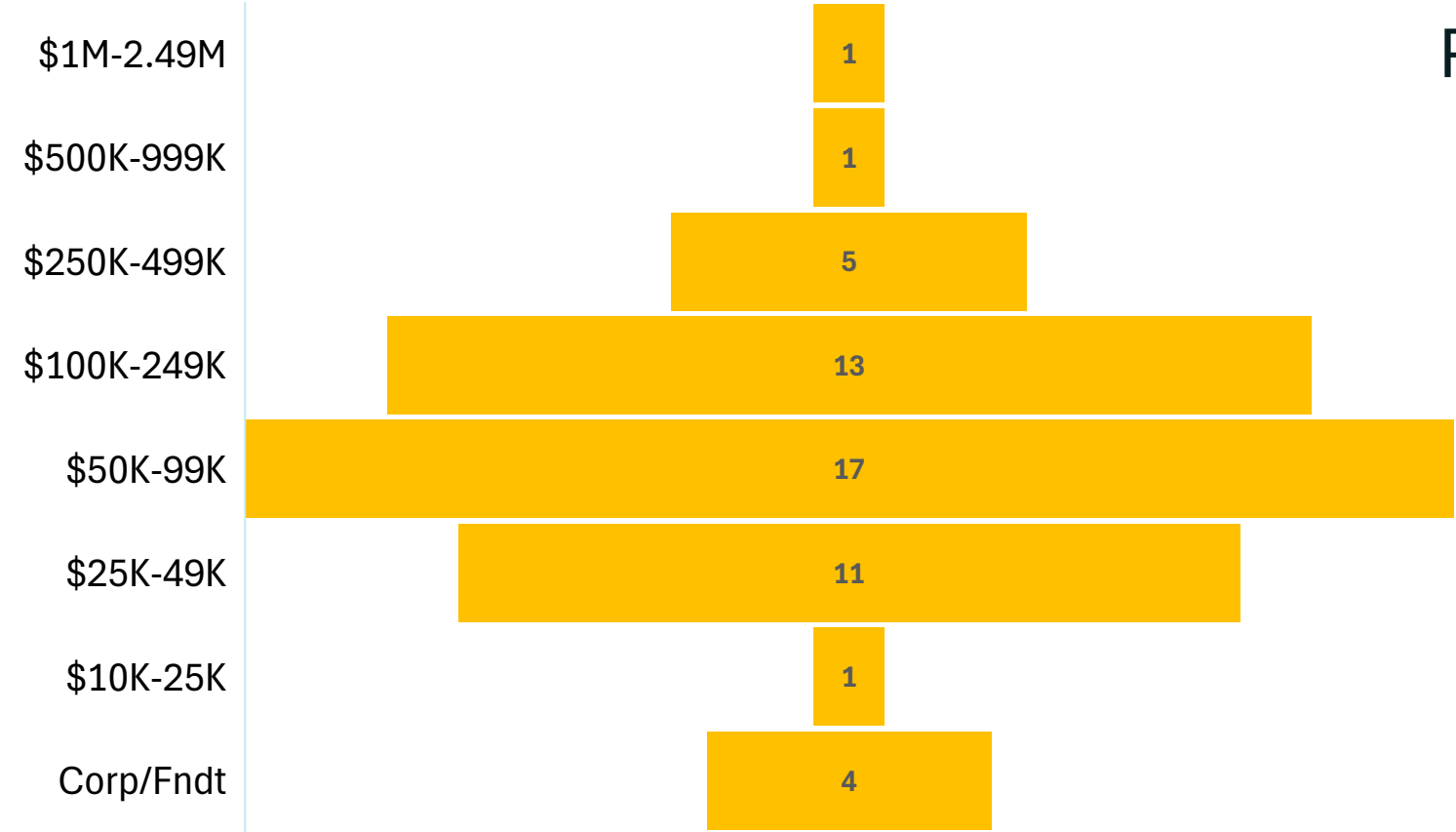


DURING THE MEETING

- Be ready with your clarifying questions
 - What's the next step?
 - Is there an opportunity for a (or another) major gift? Planned gift?
 - What's a possible timeline for an ask?
 - Have you tried various types of contact methods?
 - What do you think the reason is?
- Speak up
 - You know the data; you can confidently refer to it without calling out a DO

CHARTS & INSIGHTS

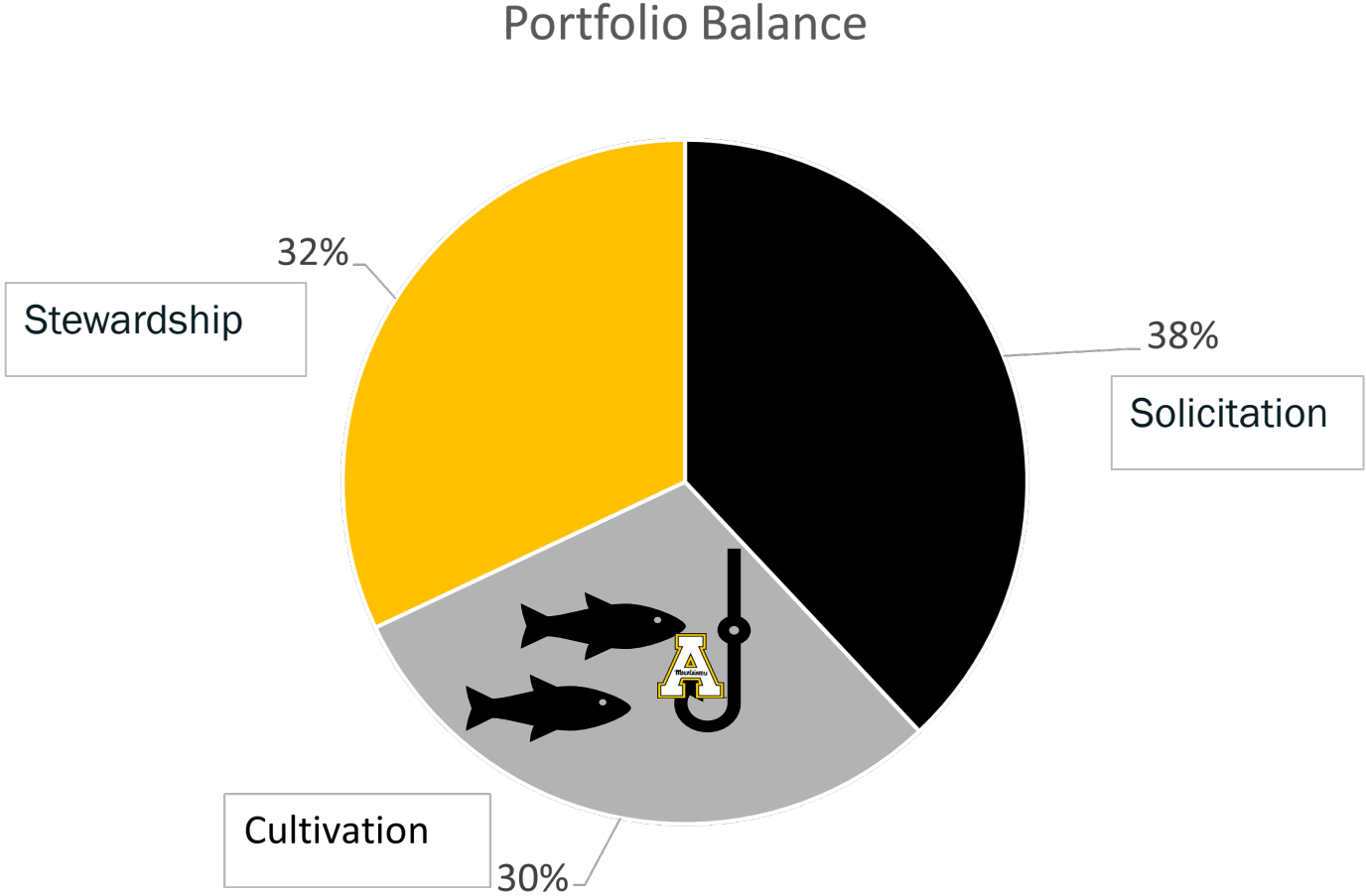
Portfolio Composition



Portfolio Value: \$5,185,000

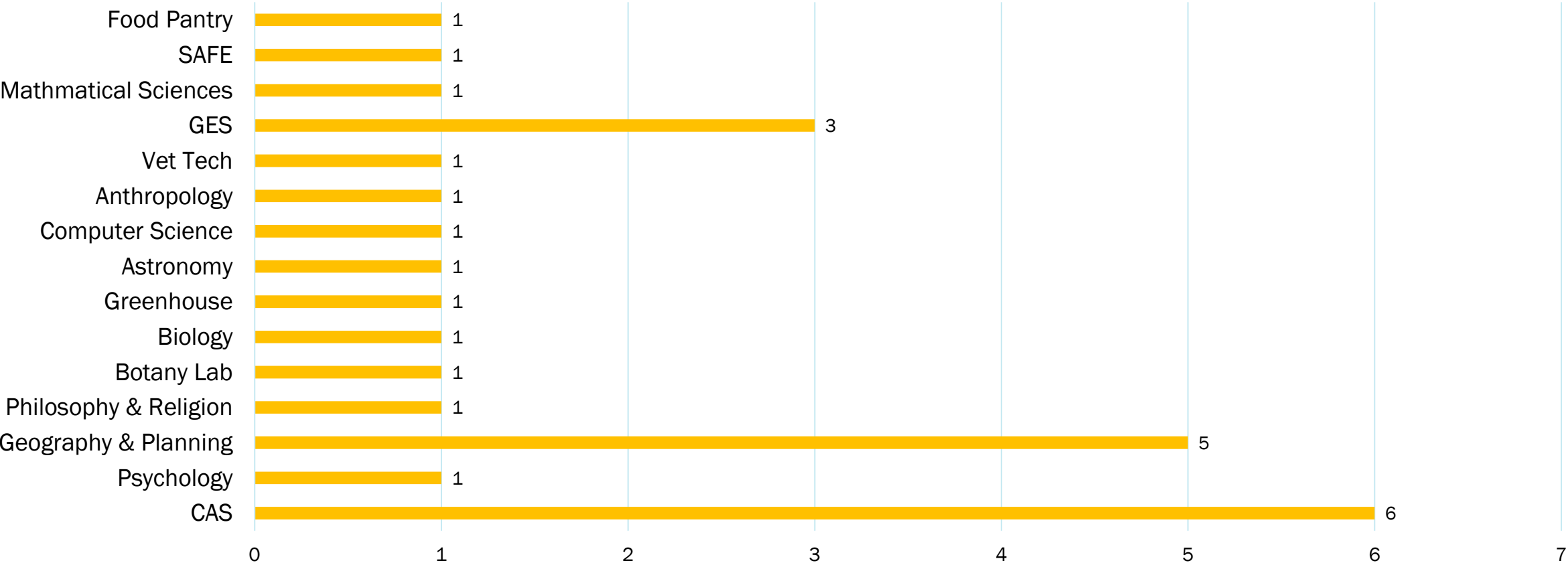


CHARTS & INSIGHTS



CHARTS & INSIGHTS

Number of Proposals



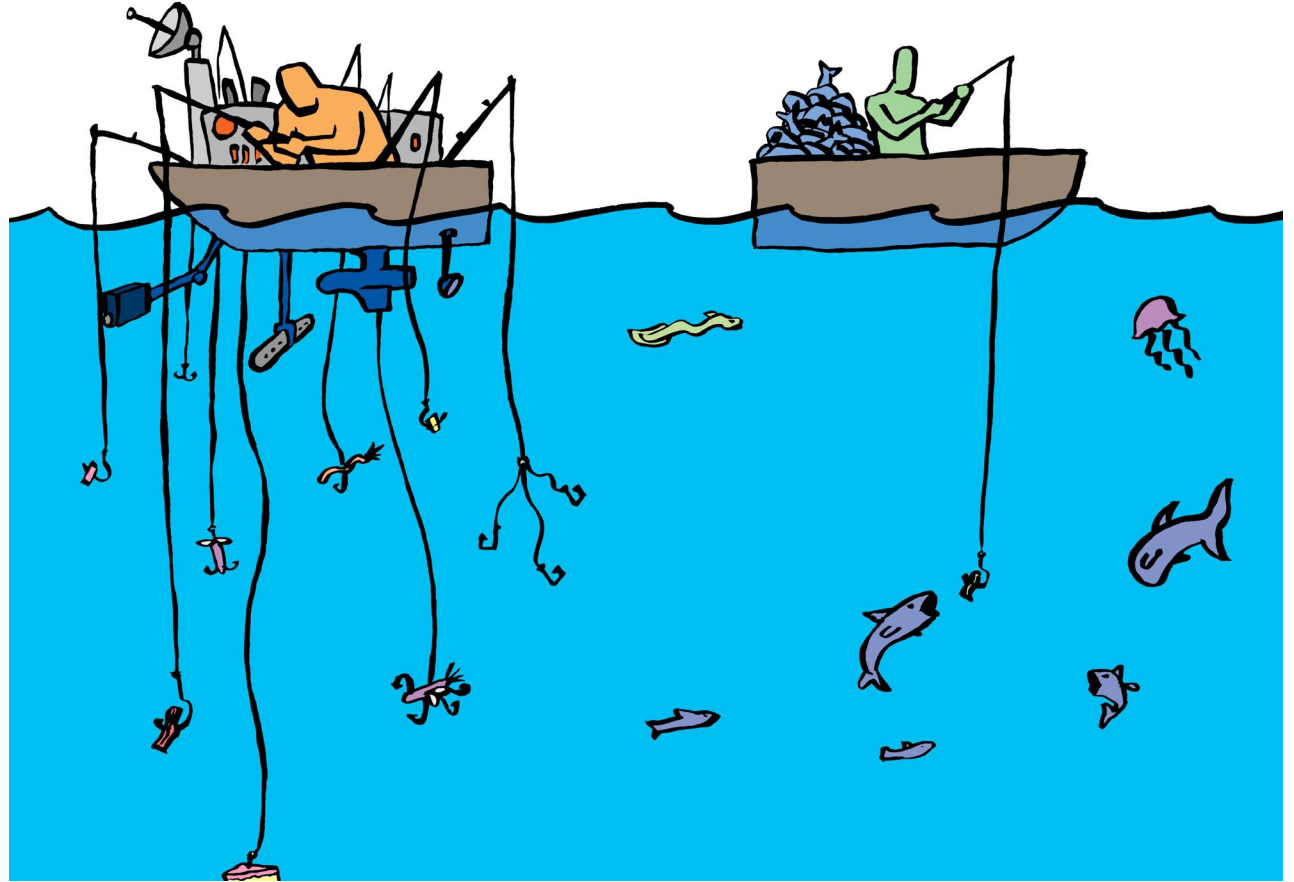
STAY IN-THE-KNOW

- Know your cast
 - Understand techniques
 - Be able to adjust your approach based on various factors



CULTIVATE THE FUNDRAISER

- Build a relationship
- Establish trust
- Utilize what you learn
- Adjust your technique



QUESTIONS?

Krystal Wilson

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THANK YOU!

Please complete your session
evaluations in the mobile app.

