



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland





Connecting the Pieces:

THE PROSPECT STRATEGY PUZZLE

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

Who We Are

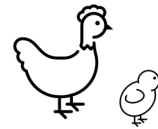
Mia

- Manager of Prospect Research & Strategy, League of Conservation Voters (LCV) with 11 MGO's and a team of 4
- 8 years in fundraising
- Love to train my 1.5 year old puppy (wannabe dog trainer)



Kelyn

- Director of Prospect Research at International Fund for Animal Welfare (IFAW) with 5 MGO's, 5 PGO's and two direct reports
- 13 years in fundraising
- Formerly managed/worked with Mia at LCV
- Cat and chicken mom



Now, About You!

How long have you been in prospect development?



Now, About You!

Do you have a prospect strategy program (or work components)
at your org?



PROSPECT DEVELOPMENT 2025



Now, About You!

How does it feel/what comes to mind when you think about prospect strategy?





Phase 1

SETTING THE SCENE

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Some Acronyms

EGC = Estimated Gift Capacity. The capacity that a researcher who is internal to our organization put on the prospect based on all of the variables.

MGO = Major Gift Officer. Raises gifts of \$10K+



The Timeline

2020

2025



Setting the Scene

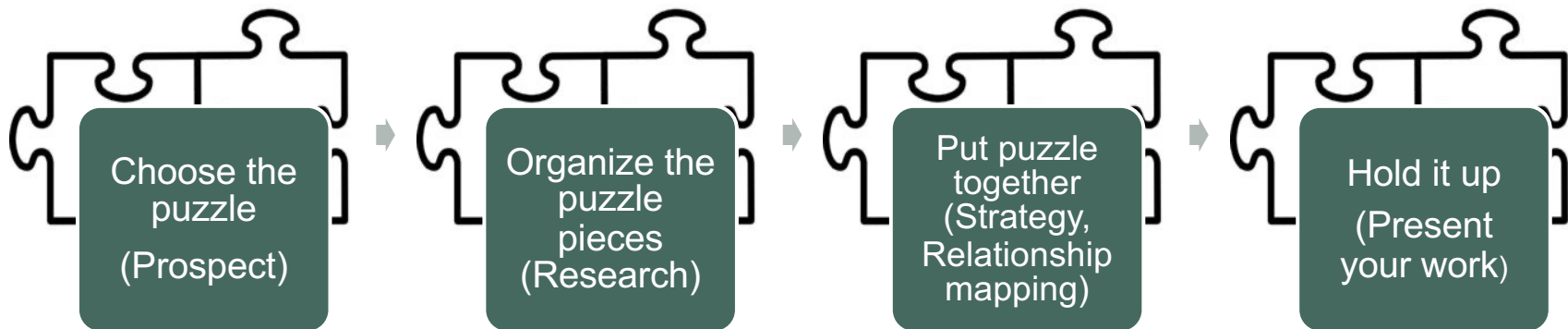
Purpose

- Move principal prospects and lead prospects to capacity gifts asap
- Collaborate and strategize with teammates
- Upgrade gifts



Setting the Scene

Process



We're All Strategists

It's fundamental to our roles and personal lives.

Estimated Giving Capacities

Work Prioritization

When to stop going down the rabbit hole

Navigating workplace social dynamics

How to manage multiple kids' schedules

How to organize your closet or home

How to manage a holiday dinner with family (and in laws!)

How to get out of a date if you just aren't vibing



Building the Program



Building it out at your Institution

- Answer the “Why”
- Build the case for support
 - Synthesize and create data to back up your case
- Have a semi-realistic timeline in mind
- Identify stakeholders
 - Gather stakeholder buy in



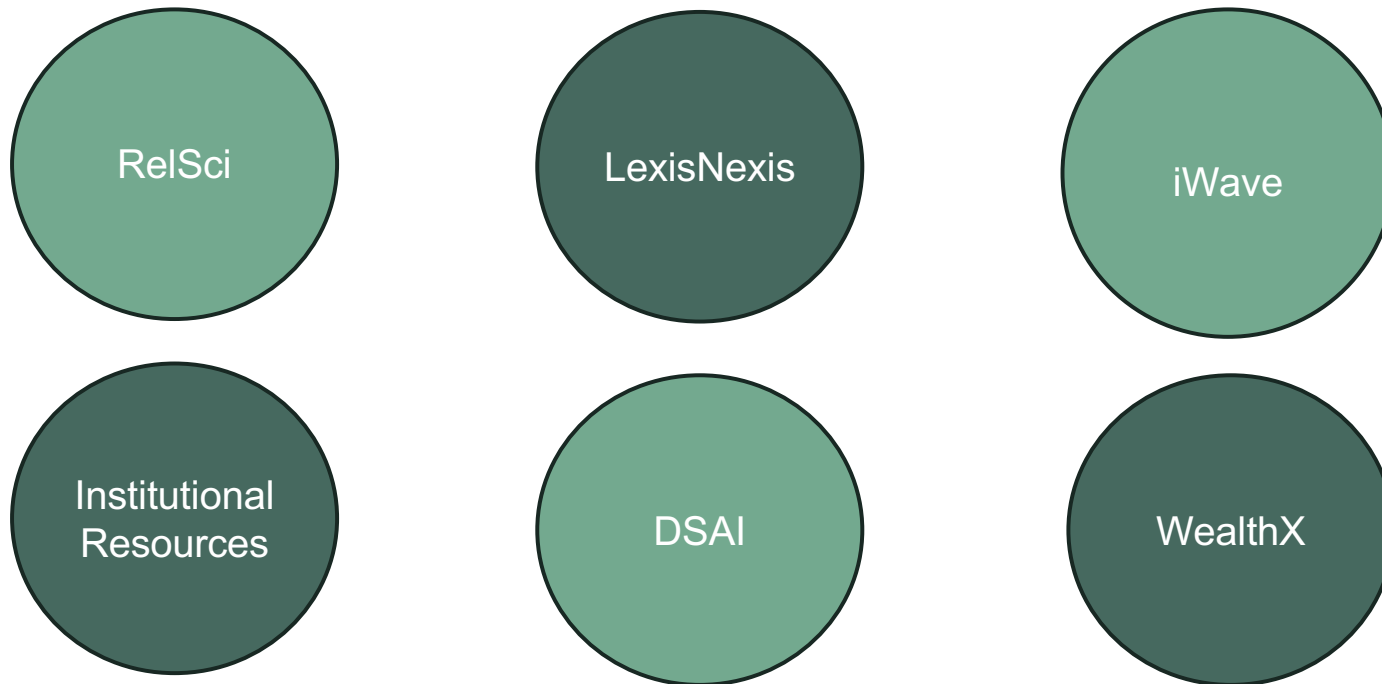
Job Description & Sourcing Talent

Figuring out what you need

- Creating a job description
 - determining if it is FT, PT, or contractor work; or that it could be part of another role
 - sourcing from other job posts that have similar tasks
 - choosing if you want a recruiter to help
- Finding the best places to post jobs
 - Apra career center
 - Idealist
 - LinkedIn (including groups or general posts using #'s)
 - Careerbuilder
 - Indeed
- Thoughtful interview questions and/or hiring exercises (if your org. does these)



Tools



Institutional Resources

You have what you need at your org, ask the questions!

- Set up meetings with program staff
- Create news alerts on HNW individuals
- Read your publications, weekly update emails, fundraising emails, social media



Strategy Briefing



Know your audience

- Shorter bio
- Interests, facts, hobbies
- Alma Mater & affiliations
- Relationship mapping
- Strategy recommendations
 - These can also be talking points!
- Capacity check (when needed)

Strategy Meetings at LCV

Iterations

- Large Group
 - 10- 12 MGOs
 - 3-4 mins/MGO
 - Review of past strategy
- Subteam
 - 3-4 MGOs
 - 10-15 mins/MGO
 - Review of past strategy

Considerations

- Participation
 - New staff
 - Opportunities to speak
- Collaboration
 - Larger groups
- Time Constraints
- Zoom or In Person



Strategy Meetings at IFAW

Participants

- All MGO's (5)
- MGO Manager(s) (1)
- Relationship Manager Consultant (1)
- Prospect Research team (2)

Agenda

- Review \$100K+ asks within 1-2 months per MGO
- Review \$100K+ asks within 3-6 months per MGO
- Review \$100K+ asks within 6-12 months per MGO
- Review PG asks per MGO*

Please note: This process was not Kelyn's, she inherited it from the team currently at IFAW, but they have been iterating. The PG review was added by Kelyn.



Integrating Work into CRM

Data stewardship

- Create donor strategy field
- Accountability
 - If it isn't in the system, it didn't happen!
 - Ensure accurate and up-to-date flow of information between research and gift officers
- Moves management

Figuring out KPI's

- What does leadership want data on in response to strategy?
 - Can you track it yourself or do you need help from another team?
- How can you build tracking KPI's into your workstream?
- Where will you track things (Excel, CRM, Project Management Software, etc.)?



Proactive vs. Reactive

Proactive

- Identify stagnant prospects
- Identify discovery prospects
- Use wealth screening scores
- Read visit notes
- Screen your database against HNW lists (Forbes 400, etc.)

Reactive

- MGO requests strategy
- Unsolicited/surprise gift
- Event research/talk points for attendees



Measuring Success

- Anecdotal Success Log
- Continue to ask for feedback!!
- KPI's for success
 - Number of strategies created vs. number of strategies that made inroads, lead to a gift, or an upgrade
 - \$ newly raised or upgraded from prospects that had strategy work completed
 - # of discovery visits for prospects with strategy work vs without



Anecdotal Success Example

Date	Prospect	Success	Money Associated	Notes	Researcher
March 2025	Bob Ross	Learned new information; upgraded gift; strengthened relationship	\$20K+ - Upgrade from \$5K to \$25K with an interest in making the same \$25K gift again next year.	A strategy was presented around interests and other philanthropy, and it worked. We were hoping to learn about family members. David knew that Bob liked birds and started talking to him about it. Bob mentioned he likes birding with his son. This connection led to how pollution effects birds and got the upgrade gift.	Mia



Figuring out the ROI

Quarterly Percent Increase

Total Giving (\$) – My Contribution (\$) = X

$$\frac{\text{My Contribution}}{X} * 100 = \% \text{ increase}$$





Phase Two

THE PROSPECT STRATEGY PUZZLE

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Get Creative!



Cold vs. Warm Prospects

Strategy Insights

- Cold Prospects
 - Hook for MGOs to get foot in the door

Strategy Briefings

- Warm Prospects
 - Reserve for visits



Get to Know Your MGOs

Nadja

- Former Teacher
- Degrees in Edu and Psych
- Has two teenagers
- Loves baseball, cooking, & fiction
- Family from Gettysburg, PA
- Loves Philly (current location)
- Related orgs: ASPCA, AFP, local food banks

Laslow

- Lifelong fundraiser; orgs include NYU, CHOP, & Yale
- Avid dog lover
- Paints, cooks, & coaches hockey
- Ties to upstate NY and Cape Cod
- Political interest - high; interest in advocacy work
- Amateur modern art collector



Build a Strategy Map

- Matching common prospect interests with internal resources
- Organize relationships that have been mapped



Strategy Map Example

If they give to....	Room to Roam	Elephants	Conservation	Kenya Scholarships	Animal Rescue Center	Poaching	Wildlife Crime
Equestrian	X	X					
Land Trusts			X				
Education				X	X		
NRA						X	X
Audubon							X



Relationship Mapping



Known Resources

- ReSci
- Iwave Connections
- WealthX Connections
- LinkedIn (Sales Navigator or other)
- Aidentified
- RelPro

Barriers to Success

- MGO's not making calls
- MGO's not requesting strategy
- RelSci profile delays
- Competing priorities
- Budgetary restrictions





The results:

Success Stories

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Case Study: Keeley Jones



Donor Profile

- \$2K-\$5K in annual giving
- Artist, multimedia
- Age above 50
- Lives in TX
- Passionate about social and environmental justice, nuclear safety
- Estimated giving capacity: \$50K

Process & Strategy

- Initial research to build profile
- Briefed by program staff on cultural strategies work
 - Art advocacy
 - Community engagement
- Capacity check
- Updated philanthropic giving
- Secured \$30K. Largest to date



Case Study: Ted Lasso



Donor Profile

- Newer donor, gave \$500
- Parent
- Works in public radio
- Volunteer
 - Child's school, 350.org, Mothers Out Front, Climate March
- Estimated capacity: \$10K
- Passionate about climate advocacy

Process & Strategy

- Initial research to find interests/built profile
- Relationship mapping
 - Yielded a connection w/ another donor
- Strategy & talking point
- Secured \$1k. Largest gift to date & a \$15k pledge



Case Study: Leslie Knope



Donor Profile

- \$5k every other year
- Estimated capacity \$25K
- Board of conservation & arts orgs
- Husband is a trustee of a college
- Interested in Montana politics
 - Corey Booker & Jon Tester are her two favorite Senators
- Political donors & philanthropic

Process & Strategy

- Initial research to build profile
- Relationship mapping yielded connections
- Talking points & strategy
- Secured \$25K. Largest gift to date



Questions and Answers

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THANK YOU!

Please complete your session
evaluations in the mobile app.

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Kklein@ifaw.org

The bottom section of the slide features a horizontal banner with a green-tinted aerial photograph of a city grid. Centered in the banner is the logo for 'apra', which consists of the lowercase letters 'a', 'p', 'r', and 'a' in a white, sans-serif font. The 'a' and 'p' are connected, as are the 'r' and 'a', with a small gap between the 'p' and 'r'.

apra