A Guide to Prospect Management

December 11, 2014

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Overview of Prospect Management and Core Fundraising Values

Introduction
The UGA prospect management program is intended to ensure the development of long-term, meaningful relationships with prospects and donors that maximizes lifelong giving and engagement with the University of Georgia. It is also intended to maintain a donor-centered culture throughout the entire development process. The prospect management system facilitates movement of prospects through the donor continuum from identification stage through stewardship to ensure optimal fundraising success. Overall, the prospect management system coordinates the campus-wide prospect management and solicitation process.

Core Values
The prospect management system is built on a shared organizational commitment to the following core values:

Teamwork: A fundamental principle of the prospect management program is to foster collaboration and communication among development staff members. The Prospect Manager and Plan Manager work to develop and coordinate an agreed upon strategy for moving assigned relationships forward. All prospect team members have responsibility for communicating and coordinating activity with the other team members.

Accountability: The Prospect Management Team will appropriately evaluate the effectiveness of development professionals to ensure that they provide the best possible experience for prospects and donors while meeting or exceeding fundraising goals.

Transparency: A transparent prospect management program is essential to the success of the University's fundraising and engagement efforts. It is intended to preserve institutional history and knowledge through contact reports. This can only be accomplished with the full participation of all staff across the University. It is the responsibility of every staff member to support and/or directly maintain all relationship data in the University's alumni database, GAIL. If a development officer wishes to contact and/or solicit a constituent, he or she must first check GAIL to determine whether the prospect is currently assigned to a prospect manager and obtain clearance from the prospect manager to insure that his/her contact supports the strategy currently in place for the prospect.

Prospect Management Team (PMT)
The Prospect Management Team is comprised of 3 development staff. These staff members provide oversight of prospect development, assignment and other prospect management related responsibilities.

Prospect management team responsibilities are outlined below:

- Prepare portfolios for frontline fundraisers to review with Senior Director monthly
- Prepare major giving, annual giving and activity reports to send out on a monthly basis
- Maintain fiscal year gift expectancy report for senior staff
- Coordinate quarterly portfolio reviews with frontline fundraisers and managers
- Review prospect plans and activity in GAIL on a daily basis to ensure data integrity
- Review clearance requests and submit to senior staff on a weekly basis
- Review pipeline activity on a regular basis
- Training development professionals on PM policy and database processes

Meet our team:

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Portfolio Management and Prospect Timeline

Portfolio Size and Distribution

The portfolio size and distribution guidelines below are recommended targets, and some degree of deviation may be appropriate. Staff from the research/prospect management office will make every effort to ensure that fundraisers are offered prospects to fill a working portfolio. Departing staff are required to conduct an out-going caseload review meeting with their supervisor and the prospect management department before their departure.

Staff Type	Portfolio[2]	Qualification	Cultivation	Solicitation	Stewardship[3]
Principal Gifts	50-75	30%	30%	30%	10%
Senior CB[1] Director	75-100	15%	40%	20%	25%
CB[1] Director	100-125	15%	40%	20%	25%
Regional	75-100	35%	30%	30%	5%

[1]*Constituent Based*
[2]*Portfolio consists of all plans attached to a fundraiser*
[3]*In addition to Stewardship – staff with long-durations at UGA will also likely carry 10-20 donors that are considered to be in Permanent Stewardship after many years of generosity to the University. Fundraisers are expected to continue to steward these individuals out of courtesy. The stewardship counts above are for those who are in temporary stewardship and expected to make additional gifts in the future.*

Portfolio Management

Each fundraiser is expected to focus on his/her portfolio. He/she must manage time to qualify, cultivate, solicit and steward their assigned prospects. Pooling prospects with no evidence of meaningful contact (i.e. personal visit) is not encouraged. **Newly Assigned prospects (suspects) should be contacted within three months (90 days) of assignment and qualified within 6 months (see below).** A fundraiser will move the prospect from a qualification/suspect plan into a cultivation/solicitation plan once the opportunity is qualified and ready to be entered in GAIL.

To encourage fundraisers to regularly review the quality and quantity of their prospect activity, the front line fundraisers may review their portfolio and pipeline (reports distributed) monthly. Additionally, each unit will meet quarterly with a team from Central Development to review and discuss the effectiveness of the major giving officers' portfolio profiles.

Prospect Timeline

The following chart provides some guidelines on the expected movement and discussion points that should be reviewed regularly by fundraisers with their supervisor.

Stage	Qualification (suspect)	Cultivation	Solicitation	Stewardship
Length	3-6 months	6-18 months	3-6 months	On-going
Demonstration of movement	Visit(s)	Multiple Meaningful Contacts	Proposal under consideration	Proposal accepted and updated in GAIL
Discussion Point	Remove from Portfolio (not a major gift prospect) or move to cultivation	Review to determine whether Prospect is ready for an opportunity – what steps are needed if not ready after 1 year (reevaluated in a year)	When a prospect moves to this stage a proposal should be included as part of fiscal year solicitation goals	Determine whether prospect should remain in active stewardship (likely to make another gift in a few years) or considered to be in permanent stewardship.

Individual Prospect Manager Clearance Request

Prior to a prospect being solicited for a major gift, the fundraiser may request clearance if no current prospect manager exists. Clearance requests on all prospects are submitted to Prospect Management via GAIL by using the "add a clearance request" on the constituent record found on the explorer bar under Tasks.
However, if a prospect manager exists, a discussion must take place between the fundraiser and that prospect manager is assigned. In addition, include a summary of this discussion in the plan narrative.

A face-to-face personal visit must have taken place prior to submitting a clearance request. Please explain in the request box in GAIL if an exception is necessary.

If a gift comes in prior to a clearance request, the fundraiser should still ask for clearance on that prospect.

*Gifts of $25k or more are considered to be major gifts at UGA. However, major gift plans and opportunities can be entered into GAIL at $10k level and above.

Corporate and Foundation Prospects

Except for a limited number of key corporate and foundation prospects that will be managed by the central CFR office, corporate and foundation prospects will not have a prospect manager. Development officers should act as a plan manager for each plan they enter on a corporation or foundation just as they would for individuals. Plans will be approved by CFR unless the organization is centrally managed. If an organization is centrally managed, the solicitation plan should be approved by central CFR before being entered into GAIL. CFR will manage a foundation or corporation when:

- It is a limited submission organization (i.e., one proposal per year from UGA so project needs to be vetted against university priorities.)
- The foundation has requested that UGA provide one central point of contact
- The foundations falls within the purview of the President (important university relationship to cultivate/solicit) and coordination is necessary.
- The foundation is one that CFR is focusing on to establish a new, university-wide relationship.

Prospect Managers and Team Members

Frequently, more than one area of the University may have a relationship with the same prospect, or a prospect may have interests in multiple areas of the University. Therefore, the prospect team may include multiple development staff team members working actively on cultivation strategies with any given prospect. Each of these staff members will be listed as a "Team Member" on the prospect record. Development officers from the same unit will not be team members for the same prospect.

Prospect Manager	Coordinates the overall fundraising relationship between the prospect and UGA; separate from a plan
Plan Manager	May also be the prospect manager if not assigned to someone else; otherwise, the head fundraiser for this plan
Secondary Manager	Other fundraisers supporting the plan manager
Secondary Solicitors	Other fundraisers, Deans, volunteers, Faculty/staff, Directors, etc.

To make changes to the Prospect Manager please contact the Prospect Management Team. Reassignment requests must support the ability to move the relationship forward in a meaningful way. The prospect management team consistently reviews all requests for assignment changes. When there are questions regarding whether or not an assignment change is appropriate, the prospect management department will ask senior staff for direction before a reassignment is made.

Plan Participants

Plan participants should not be confused with team members or solicitors. **Plan participants are those individuals who are closely linked to a prospect, such as spouses, children, family foundations, etc.** A plan should include any family members and family foundations which are considered to be significant to UGA's relationship with a prospect. **Partners/Spouses can be included as plan participants so that it is clear on both records that this couple is a prospect without the necessity of creating a plan for each spouse.**

Plan participants	Spouse, executor of an estate, etc. (this will show on their interactions page)

Types of Prospect Plans

Qualification	A documented strategy to confirm a prospect's major gift capacity and affinity to the institution through face-to-face visits. A plan may be established by a development officer or a member of the Advancement Research staff.
Cultivation/ Solicitation	A documented strategy to cultivate and solicit a major gift from a qualified prospect. In general, a face-to-face visit should occur before entering a Cultivation/Solicitation Plan.
Permanent Stewardship	This plan type is used exclusively for any prospect who is determined to be in PERMANENT stewardship (no future gifts are expected, however they have already made as significant gift to the University) A documented strategy to steward a major gift, quite often an endowment or other named fund. The donor may also have documented current gift plans.
Planned Gift Stewardship	A documented strategy to steward a donor's documented planned gift.
Principal Gift	A documented strategy to cultivate and solicit a principal gift ($1M+) from a qualified prospect. In general, a face-to-face visit should occur before entering a Principal Gift plan.

Leadership/ Annual	A documented strategy to cultivate and solicit a meaningful annual gift of $1,000 or more from a prospect within the current fiscal year. The gift is repeatable (i.e., feasibly renewed and/or increased from year to year). A new plan for each year is anticipated.

Plan Narrative/Strategy

A prospect strategy should provide an overview of key cultivation and solicitation components which will lead to a gift that serves both the University and the donor's interests. While any plan may have a strategy***, all principal prospects (1M+) are required to have a well thought out strategy that is updated throughout the prospect lifecycle.*** When developing a thorough narrative/strategy, the fundraiser may include the following:

Brief biographical sketch	Include information on family, children and professional background; education and connections to UGA; personal relationships with the institution and family relationships.
Evidence of wealth	Include a description of overall net worth; discretionary income; what is their lifestyle and other commitments; is there significant prior giving to UGA and other organizations?
Readiness to Give	**Who are they close to at the University?** Staff, volunteers, former faculty? Have they participated on Boards or committees? What has the person's giving history been? **What "lights them up," gets them excited? What may be obstacles for this person to consider a major gift/principal gift?** Are there any tipping points in the person's life? Can this person be prepared to consider a major gift/principal gift within the next twelve months?
Strategy statement	Where has this person expressed interest? For what purpose should funding be sought? How do you know that? What will appeal to the prospect? What will the prospect feel after being further engaged? Where are they on the continuum? Where do we want them to go?

Plan Stages

Based on pending step or last step completed within a plan.

Qualification	Plans are in this stage when determining if the prospect has the capacity to make a major or principal gift. Additionally, plans are in this stage as development professionals are qualifying the particular gift. This stage may require more than one personal visit to determine not only the capacity to make a significant gift, but also the gift detail. Once the fundraiser has qualified both the prospect and the gift, they should plan next steps to move the prospect to cultivation and enter a qualified opportunity. It may also be determined that the prospect is an annual gift prospect.
Cultivation (qualified opportunity exists)	Plans are in this stage when the fundraising staff is working to further involve a prospect with the University. This stage includes preparation for the solicitation and a qualified opportunity should be entered in GAIL. The prospect exits this stage when the development officer makes the Ask.
Solicitation (qualified or response pending opportunity exists)	Plans are in this stage when the formal ask has been made, but the gift has not been received. The development officer should have an opportunity in GAIL. This stage could last just one visit, or could last several visits if there is a need for the donor to consider the ask. Prospects move out of this stage when a written commitment is received or when the prospect rejects or cancels the proposal. Prospects can also move out of this stage when they have not responded to a solicitation in so long that you are essentially starting over at cultivation. **Note that all qualified, response pending and accepted opportunities are included in Development pipeline reports and these should be maintained closely so that reports are accurate when viewed by senior staff.** Outstanding proposals should be reviewed regularly for validity and relevance.
Stewardship	Plans are in this stage when they have made a commitment and are either paying on a pledge or are not yet ready to begin a new gift discussion. The gift is in and appropriate donor acknowledgements/actions are being handled. The prospect exits this stage when the donor is moved back into cultivation, into solicitation, into stewardship or dropped from the development officer's portfolio. **Prospects move out of this stage when a pledge is nearly complete or the donor is ready for a new gift discussion.**

Plan Steps/Next Steps

Steps should be used to indicate planned actions that need to be taken to move a prospect toward a gift. Some helpful guidelines are provided below:

Objective	This field has a 100 character limit. It should be used for a brief description of the desired outcome of the Step. It should answer the question "What is the purpose of this contact and/or what do I hope to accomplish?" Examples might be "Get Bill to agree to a campus visit" or "Introduce Jane to the Dean."
Owner	The step owner should be the staff member responsible for the activity, even if that person is not the Prospect Manager. As an example, if a member of the Regional team plans to meet with a donor then that staff member should be the owner of the step, even if they are not the Prospect Manager.
Status	*When entering a next step – always use the status of Pending.* Only Pending Steps show up on the My Fundraiser Page.
Contact Method	Type of contact
Stage	Stage of prospect in prospect lifecycle

Personal Visits (Interactions/Contact Reports)

A personal visit is a contact with a prospect that represents a meaningful effort to further engage the prospect or move the gift conversation forward in some way. A fundraiser's interaction/contact report in GAIL should clearly convey a face-to-face visit with a donor or prospect that involves a meaningful and strategic discussion about their individual giving.
An event contact with a prospect may be considered a visit when all three of these criteria are met and clearly conveyed in an interaction: the contact was face to face; it was deliberate; and it was strategic. **Simply meeting a prospect at an event should never be recorded as a meaningful contact.**

Other Contacts: E-mails, phone calls, text messages, etc., should also be recorded in GAIL as they are often important to move the gift conversation forward in some way.

Participants: If more than one Development professional participates in a personal visit, each fundraiser should enter their own contact report to receive credit for a personal visit.

Example of a Personal Visit

Objective:	Initial meeting to determine giving potential & interest in serving BOD
Owner:	Mr. John Smith
Stage:	Qualification
Status:	Completed
Expected date:	04/12/13

Location

Contact method:	Personal Visit

John and Sally visited with Bob Scarlett in Bob's office.

Inclination

Bob is very involoved with UGA athletics, specifically the basketball program. He knows all of our leaders in athletics. He was upset about the coach's departure but remains loyal to the team.

Relationships

He has two children in high school and is starting to think about colleges, would love to see them at UGA. His brother-in-law and other family members also graduated from UGA.

ABC, Inc. is a large hedge fund and is closed to new investors. ABC, Inc. has $20 billion under management. Bob manages $600 million for "Financials." Bob expects to make a gift to support the basketball facility.

Information concerning the prospect's ability and/or inclination to make a gift

He is also willing to serve on the basketball fundraising committee. He would also be interested in supporting the Business School. John spoke about the new Athletics Director and Business School dean. Bob was very interested and would love an opporunity to meet them.

Interests

Follow up: invite to serve on basketball fundraising committee; after next meeting arrange for lunch with Athletic Director; introduce to Business School Dean. Request clearance and add team members from Business and Athletics to help further engage Bob.

Follow-up – while helpful to include in contact report– *follow-up is best entered as pending steps*

Opportunities

<u>When a fundraiser determines that an ask should occur within the next 12 months a qualified opportunity should be created in GAIL.</u>

Opportunity Status

Initially, opportunities are created by the fundraiser with a status of "qualified". The opportunity moves through a gift cycle using status as follows:

Qualified	A Qualified opportunity is one where the Expected Ask Amount is known (or at least estimated), whether or not the potential designation is known. An Expected Ask Date should also be entered at this time and a likelihood should be selected from the dropdown. ***Qualified opportunities are included in pipeline reporting.***
Response Pending	Once an Ask has been submitted to the donor this status should be used. An Ask Date is required at this time. The likelihood should be updated. ***Response Pending opportunities are included in pipeline reporting.***
Accepted	Once **written confirmation of a specific gift has been received** from the donor this status should be used. The Accepted Amount and Response Date are required at this time. ***Accepted opportunities are included in pipeline reporting.***
Rejected	This Status should be used if a donor tells us "no" to our proposal, for whatever reason. A Response Date is required at this time. A new Opportunity should be created when a new Ask is planned.
Canceled	This Status should be used when a donor has become unresponsive or an event interferes after an Ask for an amount of time that sends us "back to the drawing board". No Response Date is required. A new Opportunity should be created when a new Ask is planned.

Opportunity Comment

The comment should include a quick snapshot of the Ask, including any details on how the gift might be designated.

How to…..

Enter a Plan in GAIL:

1. **Constituent Search**
    a. Search for your prospect
        i. Easiest way is to use their Entity ID (Lookup ID)
        ii. Always go the to the individual record, NOT the household
2. **Now on Constituent Page**
    a. Under address is "Active constituencies" – click on "Prospect"
        i. If "Prospect" is not there then add them as one
            1. Click on "Constituencies" in the middle of the page and in blue
            2. Click the "Add" tab and make them a prospect
3. **Click on Prospect in the active constituencies line**
    a. You are already on the Plans tab – click on "Add" – your only choice is "add major giving plan", so click on it even if you are doing a leadership annual plan or a stewardship plan, etc.
    b. **Plan Name –** Use the Naming Conventions found at http://www.externalaffairs.uga.edu/index.php/gail/gail_naming_conventions
        i. Ex. If the you are working on a major gift to Terry – you Plan Name would be TCOB – Major Gift Plan
    c. **Plan type**
        i. Cultivation/Solicitation – Major Gift
        ii. Leadership Annual – Annual gift that you would like to have a plan on and keep track of prospects annual giving
        iii. Permanent Stewardship – Stewarding of a gift or pledge
        iv. Planned Gift Stewardship – Stewardship of a bequest, which may have come from the Central Office
        v. Qualification – Suspect plan that typically will come directly from Research
    d. **Start date:** F3 – today, the day you started your plan
    e. **Sites:** Use down arrow, NOT magnifying glass to find your school/college/or unit that this plan is representing
    f. **Narrative – VERY IMPORTANT –** If a brand new plan, this should explain why you need to put this plan on this prospect. This should never be left blank. If you are allowed a plan (had clearance in Ascend) then please fill this in as your objective with this prospect. Why are you putting this plan on this prospect?
    g. **Plan Manager –** The fundraiser in charge of this plan, typically the person putting the plan in unless you are assisting someone else.
        i. Other areas do not need to be filled in, but if you have other people assisting with this plan than you fill in the other areas as follows:
            1. Secondary manager – Another fundraiser assisting in the plan
            2. Secondary solicitors – More fundraisers, deans, faculty, coaches, or volunteers assisting directly with this plan
            3. Plan Participants – Spouses, executors, lawyers assisting with this plan.

4. **Adding Steps to the Plan**
   a. Prior to saving the plan, you can add steps by going to the top left of the plan window and clicking on "steps."
      i. If you save and forgot to add steps you can still add a step outline by going back into the plan and clicking "edit steps."
      ii. It is NOT mandatory to utilize the step templates, you can add your own steps one at a time if you prefer
   b. Go to Outlines:
      i. Basic Major Giving Prospect Plan – If you are starting a major giving plan
      ii. Campus Planned Gift Cultivation/Solicitation Plan – Planned gift plans
      iii. Leadership Annual Giving – Annual gift plans
      iv. Long-Term Stewardship – Stewardship of gifts and pledges
      v. Proactive Suspect Assignment – for qualification plans that come out of Research
      vi. Quarterly Planned Gift Reminder – Planned Gifts that are documented, but a quarterly "thank you" is needed
      vii. Quick-Launch Major Gift Plan – If you are starting your plan at the solicitation stage
   c. Please delete all unused or unnecessary steps
      i. Make, at least, one step "Pending" status in the plan
         1. Pending steps show up on your fundraiser page and allow a contact report to be filed on the step.
         2. Planned steps are steps that you hope to get to, but have no immediate idea of when that step will take place.
5. **Don't forget to add an opportunity if appropriate**
   a. If you are to the point where you would like to put your ask into the pipeline then you need to add an opportunity
   b. Click on your plan – the first tab you are on is "Details"
   c. Go to the next tab – "Opportunities"
      i. Click "Add"
   d. Status
      i. Qualified – You know the amount you want to put into the pipeline
      ii. Response pending, rejected, canceled are all self-explanatory
      iii. Accepted – when you have the check or copy of will in hand
   e. Likelihood – Very important, so we can have an accurate pipeline of when we can expect the gift and for the amount you are asking for
   f. Ask amounts and ask dates are self-explanatory – Gift Accounting sees this in gift entry
   g. Designation – this is not necessary unless you have multiple areas for the gift and already know where it is going
      i. To find a fund click on the magnifying glass within the designation box
      ii. Go to "Purpose site" and find your area that the fund can be found such as Business
      iii. Go to "Designation" and put in an * and then one word that would be a part of that fund name, such as *Building
      iv. Click on the "Include inactive" box and SEARCH
      v. If looking for a dummy fund, do the same as above but in "Designation" put *undesignated – most likely you will use the fund with an X at the beginning of the number

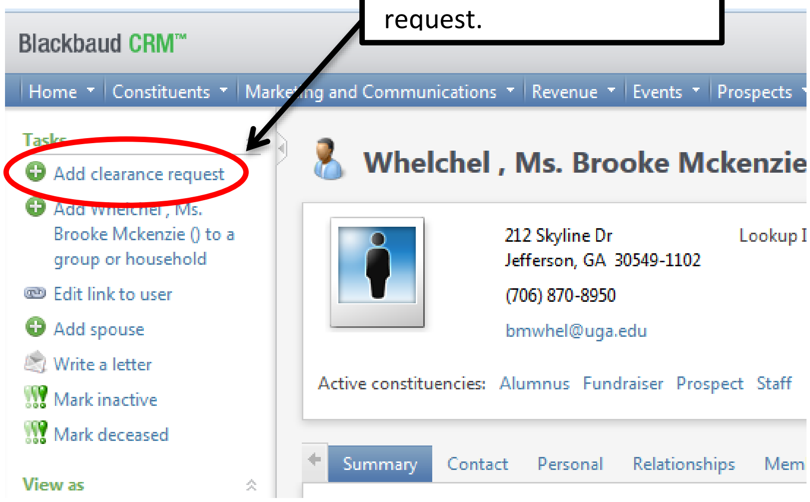
- h. You can designate to different fund numbers or it can be the same fund number but with different types of funding methods, such as cash and the other is a bequest, but to the same number
- i. Don't worry about category, type, or user code, since you have the fund number
- j. All amounts must equal to your total ask amount
- k. Comments should include what you have always included in a Goal Statement, such as where it's going and how it will come in, etc.

6. **Contact Reports versus Interactions**
   - a. If you have a plan on someone then put all of your contact reports on the plan
   - b. If you do not have a plan on someone then put your contact as an interaction
   - c. DO NOT put your contact reports in both places
   - d. If you file a contact report on a plan, it will automatically show up in that person's interactions
   - e. Filing a contact report
     - i. Click on the green arrow to the left of the top step or the step that contact report relates to
       1. If you are attached the contact report to a step, the step must be pending and there must be a contact method attached
          - a. If this is not the case then when you click the green arrow, go to "Step" and then "edit", here you can adjust the two items mentioned.
          - b. If you are adding a contact report to the plan, but it is not attached to a step, then file an Unplanned Contact report, which is an option when you click on the Contact report tab.
            - i. Doing this will add a completed step to the plan for you, so you do not need to add a step prior to putting in the contact report.
       2. Whether you are filing a contact report or an unplanned contact report, you can add or edit your objective
          - a. The Owner is the person who made the contact
          - b. The Actual Date is when the contact took place
          - c. The Stage is where you are at with your prospect currently
          - d. The Contact Method is the type of contact you had
          - e. You DO NOT need to fill out actual start time, actual end time, category, or subcategory
          - f. You may add additional fundraisers or participants who were present at that contact, but the fundraisers need to add their own contact report in order to receive equal contact credit.
          - g. Comments is your text
          - h. You may edit your next step if you have filed this contact report on an actual step.
          - i. Filing a contact report on a step completes the step and encourages you to edit your next step and make that step pending.
   - f. Interactions are the same type of form as a contact report and may be found on the left side in the explorer bar. It does not matter if you are on a prospect's major giving prospect page or their constituent page.
     - i. The reason is an interaction may be placed on ANYONE, they do not have to be a major giving prospect
     - ii. REMINDER – Do not put an interaction AND a contact report

Add Clearance Request:

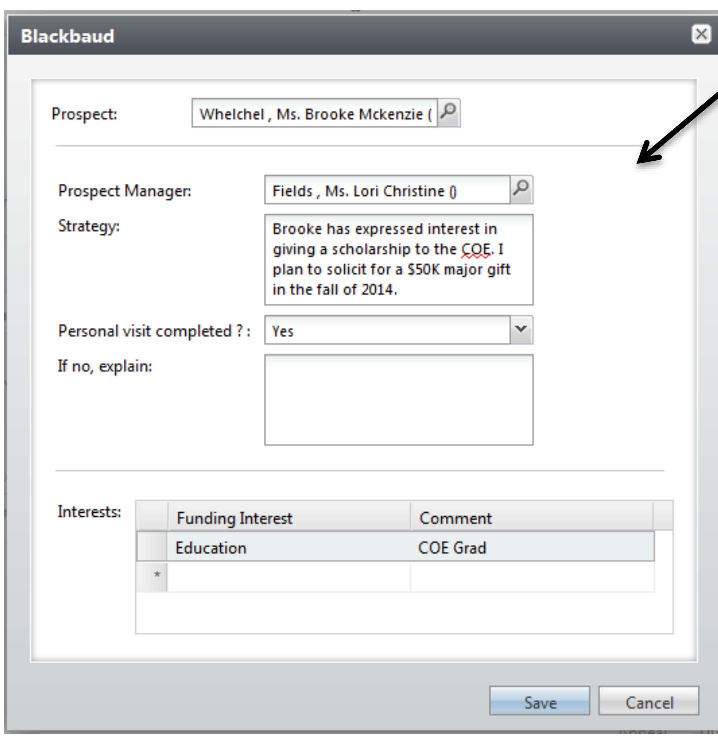
Step 1:

Go to the prospect's constituent record and click on Add clearance request.

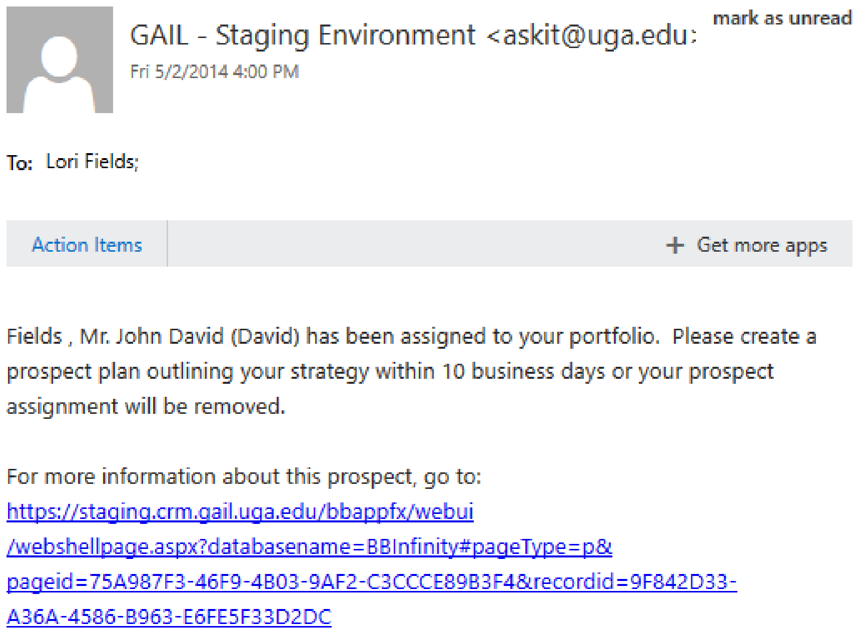


Step 2:

Fill in the appropriate information in the fields.



Step 3: Once approved, you will have ***10 business days to create a prospect plan*** *and receive an email like the example below:*


GAIL - Staging Environment <askit@uga.edu>
mark as unread
Fri 5/2/2014 4:00 PM

To: Lori Fields;

Action Items
+ Get more apps

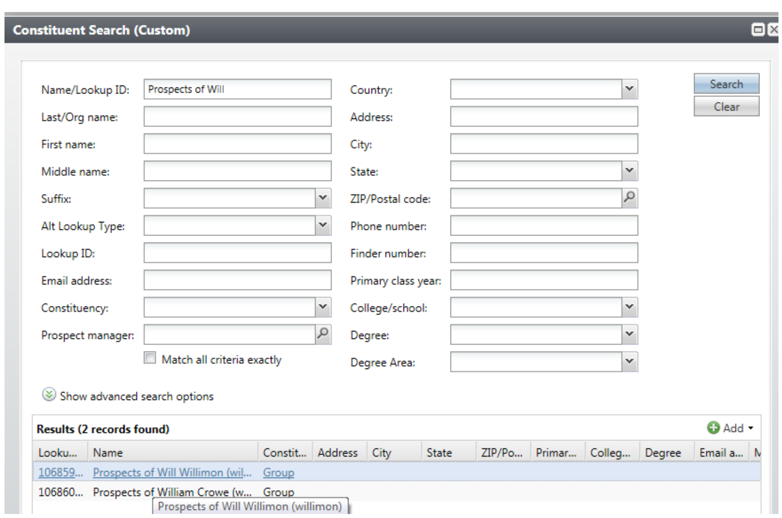
Fields , Mr. John David (David) has been assigned to your portfolio. Please create a prospect plan outlining your strategy within 10 business days or your prospect assignment will be removed.

For more information about this prospect, go to:
https://staging.crm.gail.uga.edu/bbappfx/webui/webshellpage.aspx?databasename=BBInfinity#pageType=p&pageid=75A987F3-46F9-4B03-9AF2-C3CCCE89B3F4&recordid=9F842D33-A36A-4586-B963-E6FE5F33D2DC

View your Prospects as a Group:

Through this feature, you can see all your prospect's giving history and interactions.

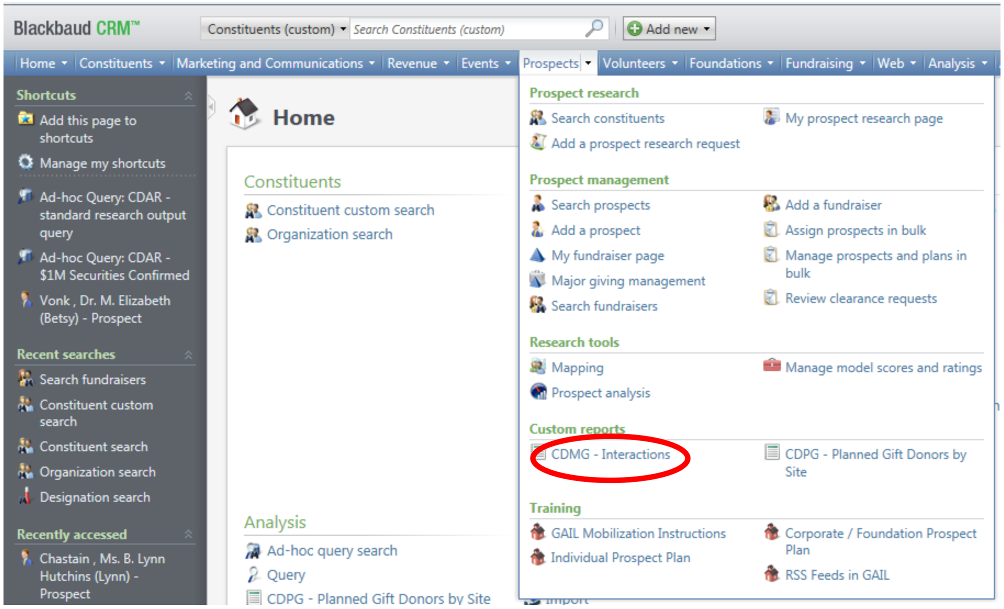
Step 1: Click on Constituent Search. In the Name/Lookup ID box type, "Prospects of (insert fundraisers name)."



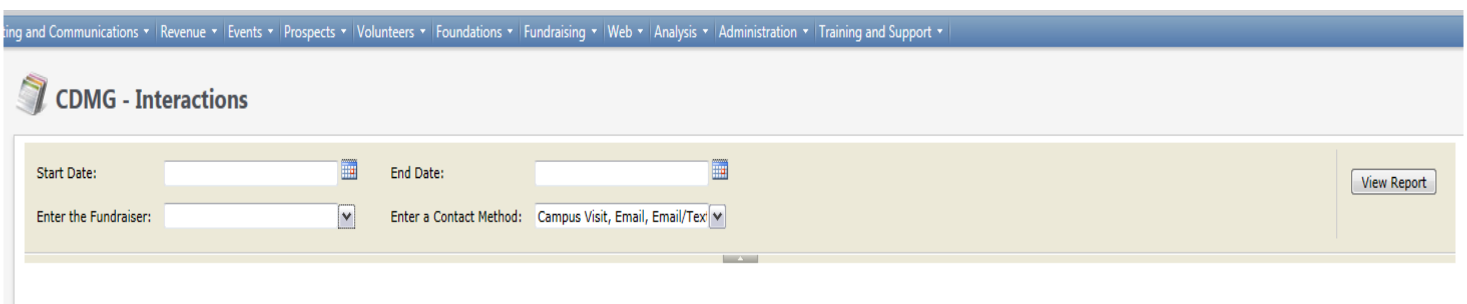
Step 2: From there, you can view all of your prospects revenue and recognition credit and interactions from the explorer bar on the left hand side of screen.

View Interactions:

Step 1:Click on the Prospects Tab and then click on CDMG – Interactions under Custom Reports.

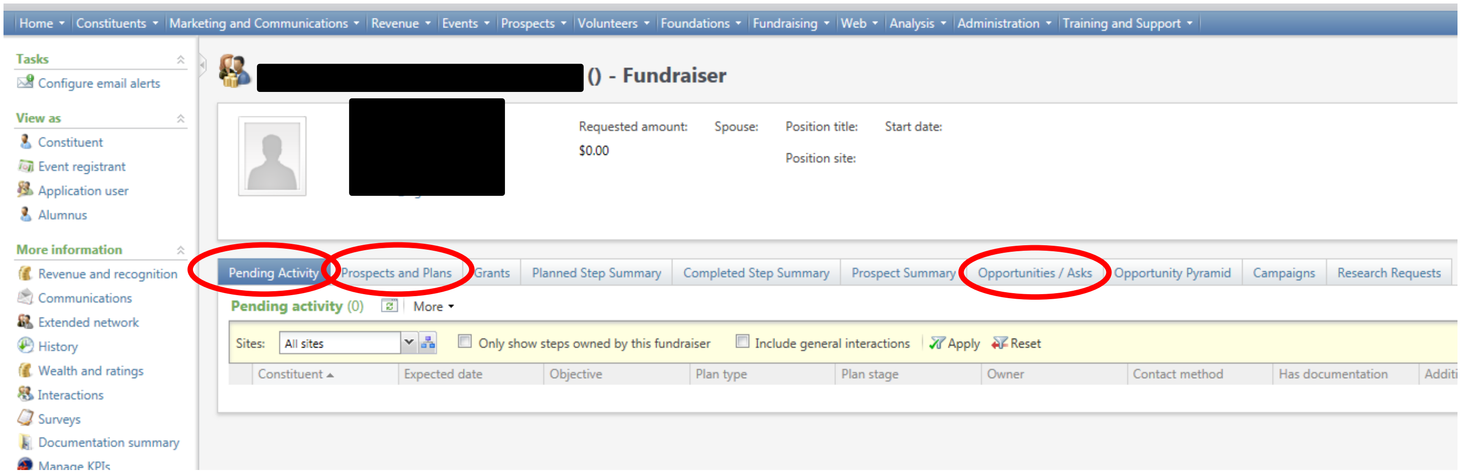


Step 2: Enter in a start and end date, the fundraiser and type of contact method to view. Then, click view report



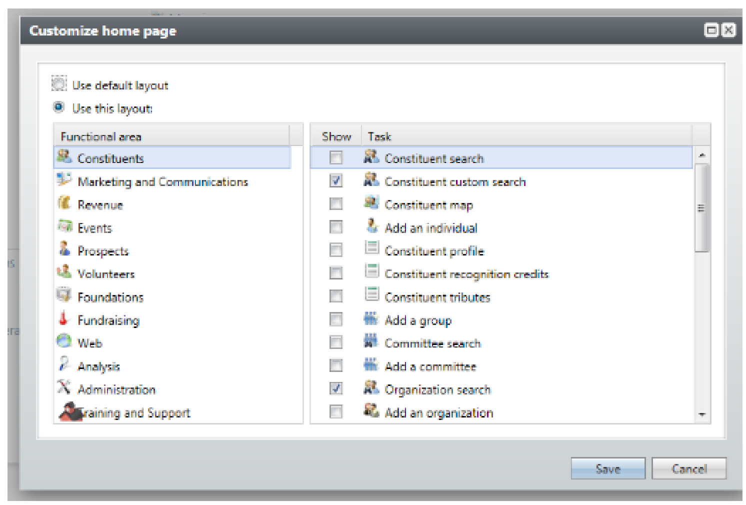
View your Portfolio:

Step 1:Search yourself as a fundraiser. From there you can view your pending activity, prospects and plans, and opportunities/Asks.



Customize your GAIL Homepage:

*Step 1: From your GAIL homepage, click on **customize** in the top right hand corner. From there you can check anything you want to show on your homepage.*



Central Development Performance Metrics

Central Development seeks to recognize and reward outstanding individual fundraising work while also providing managers the ability to hold staff members accountable for specific, individual goals. Fundraising metrics are designed to encourage collaboration while still recognizing individual contributions.

Purpose of Performance Metrics System

As development professionals make deliberate progress towards a meaningful gift commitment, the performance metrics system is intended to encourage development staff to be:

- Motivated to deepen prospect relationships through effective donor engagement.
- Accountable for his/her goals.
- Collaborative in order to maximize the value of a prospect's giving to the University.
- Invested in achieving his/her team and unit goals as well as overall Foundation goals.
- Valued and rewarded for their work, including work that is done in support of another fundraiser's engagement and solicitation activities.

Setting Goals

When evaluating fundraiser performance, managers will focus on effective management of portfolios, including moving prospects through the lifecycle of a gift, as well as objective metrics predetermined by the supervisor and fundraiser during the annual planning process. Additionally, performance measures will include visits, proposals and unit/personal fundraising targets. Goals will vary based on portfolio make-up, experience, and any non-fundraising tasks assigned to a fundraiser.

Annual Planning

Annual Planning Process and Quarterly Prospect Management Review

Dollar goals for fundraisers are set through an annual planning process that is based on expected solicitations and gift commitment closures for the upcoming year. Staff are required to provide strategic prospect plans for all of the prospects in their caseload. Plans should be updated with opportunities for any prospects that are expected to be solicited during the fiscal year, as well as updated strategies for all principal or key prospects in the portfolio.

Evaluation of Fundraiser Performance

Annual goals for Foundation fundraisers are established based on caseload make-up, unit goals, staffing, and overall job responsibilities and expectations. Fundraisers are evaluated based on their annual plan and their activity. Portfolios should be reviewed routinely by the fundraiser and his/her supervisor to ensure units are on track to achieve their respective goals.