



VISIONARY
Philanthropic Consulting, LLC

Mid Year Review

January 31, 2025

Today's Agenda

- Welcome & Introductions
- Setting the Stage for a Mid Year Review
- Conversations:
 - One-One with Staff
 - With the Entire Team
 - With the CEO & Board
- Metrics:
 - What to Track
- Questions & Conversation
- Closing & Contact Information

Your Session Leaders & Subject Matter Experts:



Jill A. Marsteller

Former President, Ursinus College & Founder, Calico International

Jill is the Founder and CEO of Calico, LLC and partners with VPC. Her professional journey began in the classroom, where she was a high school and college English instructor prior to becoming a college and university administrator. Jill has expertise in fundraising; marketing and communications; board leadership, evolution and governance; healthcare; budgeting and organizational effectiveness; mentoring and coaching; and the development and implementation of educational facilities and programs.

Michael J. Shippam

Chief Consultant, Lead Higher Education

Michael's extraordinary skill set and experience includes philanthropic analytics, annual giving, leadership annual giving, major and principal gifts, campaign planning and management, staff management, performance metrics; prospect management and prospect strategy, board development, organizational effectiveness; and donor relations/stewardship. His campaign experience the \$250 Million inaugural Campaign for the University of Buffalo.



Setting the Stage for Mid-Year Review

- *One on One*
- *Team*
- *Board*

One-on-One Conversations



Team Conversation



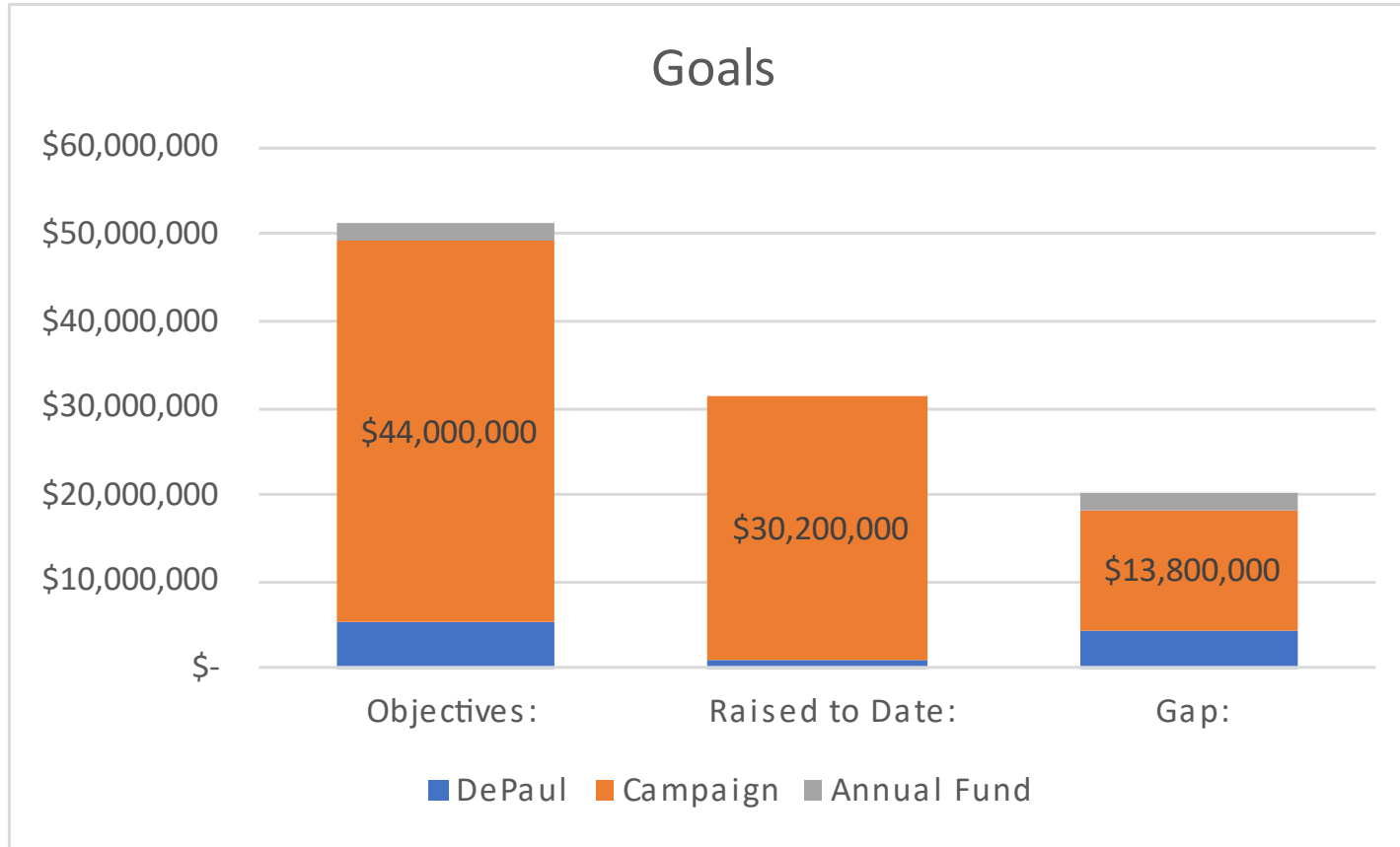
Board Conversation: Managing Expectations



Metrics: What to Track



Draft Dashboard Report: Summary

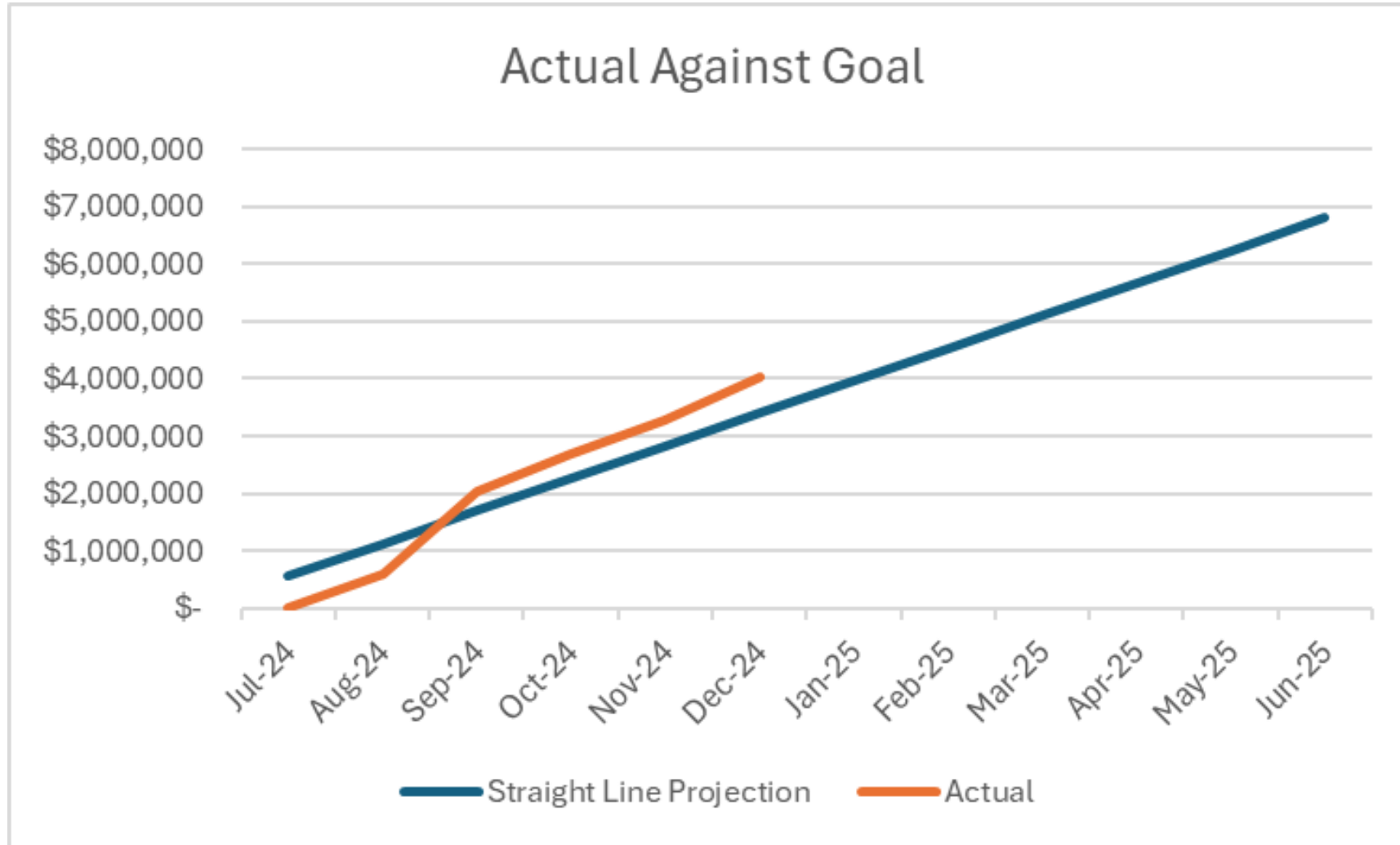


	DePaul	Campaign	Annual Fund
Objectives:	\$ 12,000,000	\$ 31,000,000	\$ 2,000,000
Raised to Date:	\$ 9,000,000	\$ 20,000,000	
Gap:	\$ 3,000,000	\$ 11,000,000	\$ 2,000,000

Pipeline	# Number	\$ Value	Discount	Projection
Proposals Pending	4	\$ 2,000,000	75%	\$ 1,500,000
Proposals (in Process)	5	\$ 4,000,000	50%	\$ 2,000,000
Total	9	\$ 6,000,000		\$ 3,500,000

To-Do List		
Number	Item	Completed
1	Board Member Prospect Review	100%
2	Board Member Prospect Assignment	0%
3	Staff Prospect Review	100%
4	Staff Prospect Assignment	75%
5	Bi Monthly Prospect Review Sessions	6%

Straight Line Against Goal



Sample Plan

Work Plan Goals	Type
	1. Portfolio Size
	2. Visits
	3. Discovery Calls
	4. # of Solicitations
	<i>LG / MG</i>
	<i>New or Upgraded Level GEC</i>
	<i>Renewal Existing Level GEC</i>
	<i>OTHER</i>
	<i>Facilitator Credit</i>
	5. # of Gifts Closed
	<i>LG / MG</i>
	<i>New or Upgraded Level GEC</i>
	<i>Renewal Existing Level GEC</i>
	<i>OTHER</i>
	<i>Facilitator Credit</i>
	6. Dollars Solicited
	<i>LG / MG</i>
	<i>New or Upgraded Level GEC</i>
	<i>Renewal Existing Level GEC</i>
	<i>OTHER</i>
	<i>Facilitator Credit</i>
	7. Dollars Closed
	<i>LG / MG</i>
	<i>New or Upgraded Level GEC</i>
	<i>Renewal Existing Level GEC</i>
	<i>OTHER</i>
	<i>Facilitator Credit</i>
8. Newly Qualified Prospects	

FY24		
Goal	YTD	% of Goal
1958	0	0.00%
2965	0	0.00%
353	0	0.00%
558	0	0.00%
290	0	0.00%
185	0	0.00%
59	0	0.00%
24	0	N/A
5	0	0.00%
239	0	0.00%
82	0	0.00%
96	0	0.00%
39	0	0.00%
22	0	N/A
1	0	0.00%
\$27,148,801	\$0	0.00%
\$22,586,000	\$0	0.00%
\$1,469,375	\$0	0.00%
\$375,000	\$0	0.00%
\$1,218,426	\$0	N/A
\$50,000	\$0	0.00%
\$20,305,500	\$0	0.00%
\$12,685,500	\$0	0.00%
\$647,500	\$0	0.00%
\$347,500	\$0	0.00%
\$1,125,000	\$0	N/A
\$50,000	\$0	0.00%
137	0	0.00%

FY23		
Goal	YTD	% of Goal
0	173	
0	191	#DIV/0!
0	42	#DIV/0!
0	54	#DIV/0!
0	17	#DIV/0!
0	23	#DIV/0!
0	2	#DIV/0!
0	12	N/A
0	0	0.00%
0	46	#DIV/0!
0	8	#DIV/0!
0	11	#DIV/0!
0	7	#DIV/0!
0	20	N/A
0	0	0.00%
\$0	\$4,037,500	#DIV/0!
\$0	\$3,583,000	#DIV/0!
\$0	\$288,500	#DIV/0!
\$0	\$57,500	#DIV/0!
\$0	\$108,500	N/A
\$0	\$0	0.00%
\$0	\$2,603,508	#DIV/0!
\$0	\$2,105,650	#DIV/0!
\$0	\$232,500	#DIV/0!
\$0	\$105,565	#DIV/0!
\$0	\$159,792	N/A
\$0	\$0	0.00%
0	3	#DIV/0!

FY22		
Goal	YTD	% of Goal
200	251	125.50%
185	224	121.08%
17	49	288.24%
45	65	144.44%
15	17	113.33%
26	31	119.23%
4	8	200.00%
0	9	N/A
0	0	0.00%
29	48	165.52%
8	6	75.00%
17	12	70.59%
4	7	175.00%
0	23	N/A
0	0	0.00%
\$7,375,000	\$8,823,300	119.64%
\$6,950,000	\$8,269,000	118.98%
\$325,000	\$377,000	116.00%
\$100,000	\$110,000	110.00%
\$0	\$67,300	N/A
\$0	\$0	0.00%
\$3,375,000	\$3,432,078	101.69%
\$3,075,000	\$2,882,251	93.73%
\$200,000	\$207,000	103.50%
\$100,000	\$79,000	79.00%
\$0	\$263,827	N/A
\$0	\$0	0.00%
11	17	154.55%

FY23				
Fundraiser Metrics	# Entities Visited		Q-Totals	YTD Totals
	July	8	54	191
	Aug	12		
	Sep	34		
	Oct	44	85	
	Nov	25		
	Dec	16		
	Jan	27	52	
	Feb	13		
	Mar	12		
	Apr	0	0	
	May	0		
Jun	0			
Total as of	03/31/14		191	

Over =	Duplicate OASIS Entries	Over/Under
Under =	Missing OASIS Entries	0

Leadership Annual Giving Metrics

Leadership Annual Gift Strategy:															
Capacity Range:	\$2,500 capacity to \$24,999 capacity														
Target Gift:	\$500 - \$5,000 (over 5 years)														
Prospect Pool:	DS1-1 & \$2,500 - \$24,999														
Total	648														
Portfolio Size	60														
	May	June	July	August	September	October	November	December	January	February	March	April	May	June	Total
Calls / Month	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	70.0
Visits / Month	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	35.0
Proposals	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	17.5
Average Value	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	
	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	\$ 3,125	
Closure Rate	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	
Gross Cash	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 35,000
Pledge Value	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	
Total Pledge	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 175,000

Total Gift Activity

Name	Ind MG Count	Ind GEC Count	SOLICITED							Individual Totals	CLOSED						Individual Totals
			MG \$'s		ANNUAL \$'s		OTHER \$'s		MG \$'s		ANNUAL \$'s		OTHER \$'s				
			Outright	Deferred	New or Level Upgrade	Renew Existing Level	Outright	Deferred	Outright		Deferred	New or Level Upgrade	Renew Existing Level	Outright	Deferred		
Simpson, Homer	0	6	\$0	\$0	\$224,000	\$47,500	\$50,500	\$0	\$322,000	\$0	\$0	\$19,000	\$22,500	\$52,300	\$0	\$93,800	
Albertson, Kumiko	0	17	\$650,000	\$0	\$151,500	\$47,500	\$0	\$0	\$849,000	\$0	\$0	\$114,040	\$45,000	\$200	\$0	\$159,240	
Albright, Ms.	0	3	\$0	\$0	\$155,000	\$0	\$26,000	\$0	\$181,000	\$0	\$0	\$22,500	\$0	\$5,800	\$0	\$28,300	
Amadopolis, Aristotle	0	1	\$0	\$0	\$72,500	\$0	\$26,000	\$0	\$98,500	\$0	\$0	\$5,000	\$0	\$13,500	\$0	\$18,500	
Bailey, Mary	0	2	\$100,000	\$0	\$15,000	\$0	\$1,050	\$0	\$116,050	\$0	\$0	\$15,000	\$0	\$2,550	\$0	\$17,550	
Barlow, Birchibald	0	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Beardly, Jasper	2	8	\$1,875,000	\$300,000	\$227,500	\$10,000	\$25,000	\$0	\$2,437,500	\$175,000	\$0	\$52,500	\$17,500	\$25,000	\$0	\$270,000	
Borton, Wendell	4	15	\$700,000	\$1,100,000	\$139,375	\$7,500	\$130,000	\$5,000	\$2,081,875	\$150,000	\$550,000	\$147,000	\$22,500	\$68,478	\$5,000	\$942,978	
Bouvier, Clarence	2	1	\$1,575,000	\$0	\$0	\$7,500	\$0	\$0	\$1,582,500	\$50,000	\$1,000,000	\$0	\$25,000	\$1,500	\$0	\$1,076,500	
Brockman, Kent	1	8	\$50,000	\$5,454,317	\$52,500	\$52,500	\$10,000	\$11,000	\$5,630,317	\$0	\$304,317	\$17,500	\$52,500	\$34,898	\$10,000	\$419,215	
Busby, Chazz	2	1	\$100,000	\$1,800,000	\$432,500	\$0	\$12,900	\$25,000	\$2,370,400	\$50,000	\$200,000	\$12,500	\$0	\$31,714	\$0	\$294,214	
SGT	1	3	\$100,000	\$0	\$134,000	\$50,000	\$0	\$0	\$284,000	\$100,000	\$0	\$20,000	\$50,000	\$0	\$0	\$170,000	
Burns, Charles	0	0	\$50,000	\$1,750,000	\$107,500	\$0	\$0	\$0	\$1,907,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Chalmers, Shauna	1	2	\$0	\$304,317	\$75,000	\$0	\$8,000	\$1,000	\$388,317	\$0	\$304,317	\$17,500	\$0	\$5,000	\$0	\$326,817	
Christian, Scott	5	10	\$1,837,500	\$800,000	\$119,500	\$8,500	\$50,000	\$0	\$2,815,500	\$274,052	\$50,000	\$100,500	\$8,500	\$31,750	\$0	\$464,802	
Crusher, Joey	3	4	\$250,000	\$50,000	\$82,500	\$0	\$73,500	\$10,000	\$466,000	\$150,000	\$50,000	\$37,500	\$0	\$11,000	\$11,000	\$259,500	
Desmond, Declan	0	0	\$0	\$900,000	\$0	\$0	\$0	\$0	\$900,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Flanders, Ned	1	4	\$1,450,000	\$100,000	\$140,000	\$57,500	\$6,650	\$30,000	\$1,784,150	\$0	\$50,000	\$72,500	\$0	\$4,647	\$35,000	\$162,147	
Fontaine, Laney	1	7	\$0	\$450,000	\$254,000	\$42,500	\$28,000	\$0	\$774,500	\$0	\$250,000	\$22,500	\$37,500	\$94,618	\$0	\$404,618	
Franco, Julio	4	16	\$578,000	\$100,000	\$196,500	\$77,500	\$123,500	\$0	\$1,075,500	\$458,000	\$0	\$109,000	\$35,000	\$121,206	\$0	\$723,206	
Terwilliger, Gino	1	6	\$750,000	\$250,000	\$285,000	\$32,500	\$0	\$5,000	\$1,322,500	\$0	\$750,000	\$90,000	\$7,500	\$6,500	\$10,000	\$864,000	
Other (Joint Credit)	-2	-5	-\$50,000	-\$304,317	-\$112,500	\$0	\$0	-\$11,000	-\$477,817	-\$50,000	-\$304,317	-\$47,500	\$0	-\$1,500	-\$10,000	-\$413,317	
	26	109							\$26,909,292							\$6,282,069	

Portfolio Status

Name	Portfolio Prime Assignments 12/31/24	# Open Proposals	% of Total Proposals	Pending Asks	# of GEC Proposals	GEC Proposals % of Total Proposals	# of MG Proposals	MG Proposals % of Total Proposals	Target Ask Amount	% of Total Target Ask	Actual Ask Amount	% of Total Actual Ask	Expected Close Amount (Cash Flow)	% of Total Expected Cash Flow
	A-	B-	C-	D-	E-	F-	G-	H-	I-	J-	K-	L-	M-	N-
Simpson, Homer	284	109	9	37	87	80	22	20	\$ 5,825,500.00	11	\$ 1,342,500.00	4	\$ 4,684,750.00	32
Albertson, Kumiko	219	49	4	16	33	67	16	33	\$ 1,251,000.00	2	\$ 343,500.00	1	\$ 1,011,000.00	7
Albright, Ms.	16	2	0	0	2	100	0	0	\$ 15,000.00	0	\$ 15,000.00	1	\$ -	0
Amadopolis, Aristotl	143	24	2	2	21	88	3	13	\$ 1,182,500.00	2	\$ 1,150,000.00	4	\$ 75,000.00	1
Bailey, Mary	265	131	11	85	83	63	48	37	\$ 6,907,500.00	13	\$ 715,000.00	2	\$ 2,082,500.00	14
Barlow, Birchibald	264	134	11	42	92	69	42	31	\$ 5,519,000.00	11	\$ 1,911,500.00	6	\$ 1,290,000.00	9
Beardly, Jasper	90	7	1	2	2	29	5	71	\$ 717,500.00	1	\$ 217,500.00	1	\$ 307,500.00	2
Borton, Wendell	296	102	8	36	79	77	23	23	\$ 2,720,000.00	5	\$ 1,902,500.00	6	\$ 637,500.00	4
Bouvier, Clarence	217	7	1	3	5	71	2	29	\$ 137,500.00	0	\$ 30,000.00	0	\$ 130,000.00	0
Brockman, Kent	272	125	10	25	89	71	36	29	\$ 5,170,000.00	10	\$ 1,755,000.00	6	\$ 65,000.00	0
Busby, Chazz	288	87	7	18	71	82	16	18	\$ 3,880,000.00	7	\$ 2,032,500.00	6	\$ 120,000.00	1
SGT	0	63	5	11	51	81	12	19	\$ 2,204,500.00	4	\$ 1,658,000.00	5	\$ 299,000.00	2
Burns, Charles	77	0	0	0	0	0	0	0	\$ -	0	\$ -	0	\$ -	0
Chalmers, Shauna	204	74	6	44	55	74	19	26	\$ 2,823,500.00	5	\$ 10,483,500.00	33	\$ 375,000.00	3
Christian, Scott	251	100	8	32	57	57	43	43	\$ 6,292,500.00	12	\$ 4,942,500.00	15	\$ 837,500.00	6
Crusher, Joey	231	101	8	57	70	69	31	31	\$ 3,955,000.00	8	\$ 852,500.00	3	\$ 2,604,500.00	18
Desmond, Declan	194	100	8	20	62	62	38	38	\$ 3,577,500.00	7	\$ 2,537,500.00	8	\$ 63,500.00	0
Total	3311	1215	100	430	859	71	356	29	\$ 52,178,500.00	100	\$ 31,889,000.00	100	\$ 14,582,750.00	99
Average	276	101		36	72		30		\$ 4,348,208.33		\$ 2,657,416.67		\$ 1,215,229.17	
10/25/12 Status	2432	1260/105		426/36	917/76	73	343/29	27	\$ 56,171,000.00		\$32,380,500		\$19,380,750	
Increase/(Decrease)	879	(45)		(4)	(58)	(2)	13	2	(\$3,992,500)		(\$491,500)		(\$4,798,000)	

Sample Plan

Advancement Fundraiser Performance Agreement					
Goals for Fiscal Year 2015					
April 1, 2014 - March 31, 2015					
FUNDRAISER					
NAME:	Simpson, Homer				
MANAGER:	Michael Shippam				
DEPARTMENT:	Office of Regional Advancement				
			GOALS	ACTUAL	% of GOAL
1	Fundraiser Commitments Booked	=	\$955,000	\$0	0%
	<i>Defined as credit associated with Proposal Lead & Solicitor designation. Maximum credit is 100%.</i>				
2	Fundraiser Solicitations Completed	=	20	0	0%
	<i>Defined as any proposal transactions where fundraiser is listed as Proposal Lead or Solicitor. Developed based on primary gift type the fundraising is responsible for managing. Example: Regional Director = Major Gift Solicitations</i>				
3	GEC Memberships	=	5	0	0%
	GOAL for ALL Fundraisers is 100% Solicited for Renewal Memberships , ideally 18 months prior	=	100%	0%	0%
	GOAL for ALL Fundraisers is 80% Close to YES for Renewal Memberships	=	80%	0%	0%
	<i>NON GEC Officer: Annual goal of five (5) NEW or RENEWED GEC memberships. GEC Officer: Annual goal as determined by management.</i>				
4	Total Unit Commitments Booked	=	\$14,000,000	\$0	0%
	<i>Central Unit: Defined by Proposal Lead or Solicitor designation by member of unit. Division Unit: Defined by Total Commitments raised for unit.</i>				
5	Special Activity Based Objectives		GOALS	ACTUAL	% of GOAL
i	Vists		150-180		
ii	Staff and support the DC Region's Cabinet		Monthly		
iii	Advancement-wide progress toward completing the Washington, DC Regional campaign		\$ 14,000,000		
iv	Portfolio Size		90-110		
v	Coordinate the transfer of GEC & Major Gift prospects with the Region's GEC gift officer		eight to twelve		
	<i>Activity Specific Objectives, for example: For a Fundraiser Manager; "Fundraising Staff Delivers at least 75% of Commitment Goals".</i>				

VISIONARY

Questions & Answers



Think Outside the Box

Visionary Methodology™

Reexamine

Assess your strategies & approaches

Dive deep to understand your donors' characteristics and key motivators.

Identify and leverage the most inspirational, effective, and relevant aspects of your mission and vision.

Reimagine

Innovate and find new ways to engage and inspire your donors

Discover the tipping points of service efficacy and satisfaction to maximize campaign potential.

Define your relevance to the philanthropic community and communicate it boldly.

Realign

Adjust your actions to stay in sync with your mission & goals

Deploy precious resources strategically and most efficiently to boost and amplify results.

Measure, monitor, and adjust as we collaborate with you to turn your vision into reality.

VISIONARY

Thank You!



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