

The Art & Science of Portfolio Strategy

Driving Fundraising Through
Data Driven Decisions





KindCon²⁰²⁵



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Texas A&M Foundation

Texas A&M Foundation



75 Development Officers



4 Portfolio Strategy Analysts



2 Researchers

Total Fundraised in FY25

\$411M

Agenda

Strategic Partnership **01**

Portfolio Philosophy **02**

Impactful Philanthropy **03**

Creating Your Own Strategy **04**



Our goal:
Create the most
gratifying gifting
experience for donors.



Strategic Partnership





There is no “Art” of
fundraising without
the “Science” of
fundraising.



Portfolio Strategy
Analyst



Development
Officer

Process



Research Recommendations

- Pre-Qualification from nearly 1M records
- Capacity + Affinity + Priority + Timing
- Resourcing internal and external prospecting tools



Portfolio Strategy Referrals

- Curated & Actionable
- Assigned based on individual Portfolio needs
- Coordination Policy check
- Engagement Strategy



Portfolio Management

- Monthly Pipeline Check-Ins
Missed Forecast, Upcoming Asks, Data Errors, Contact Lapse, Stagnation, Referrals Review, & Progress to Goals
- Quarterly Reviews
Portfolio Health, Activity Trends, & Progress to Goals

Partner in Officer Success

Data Translator

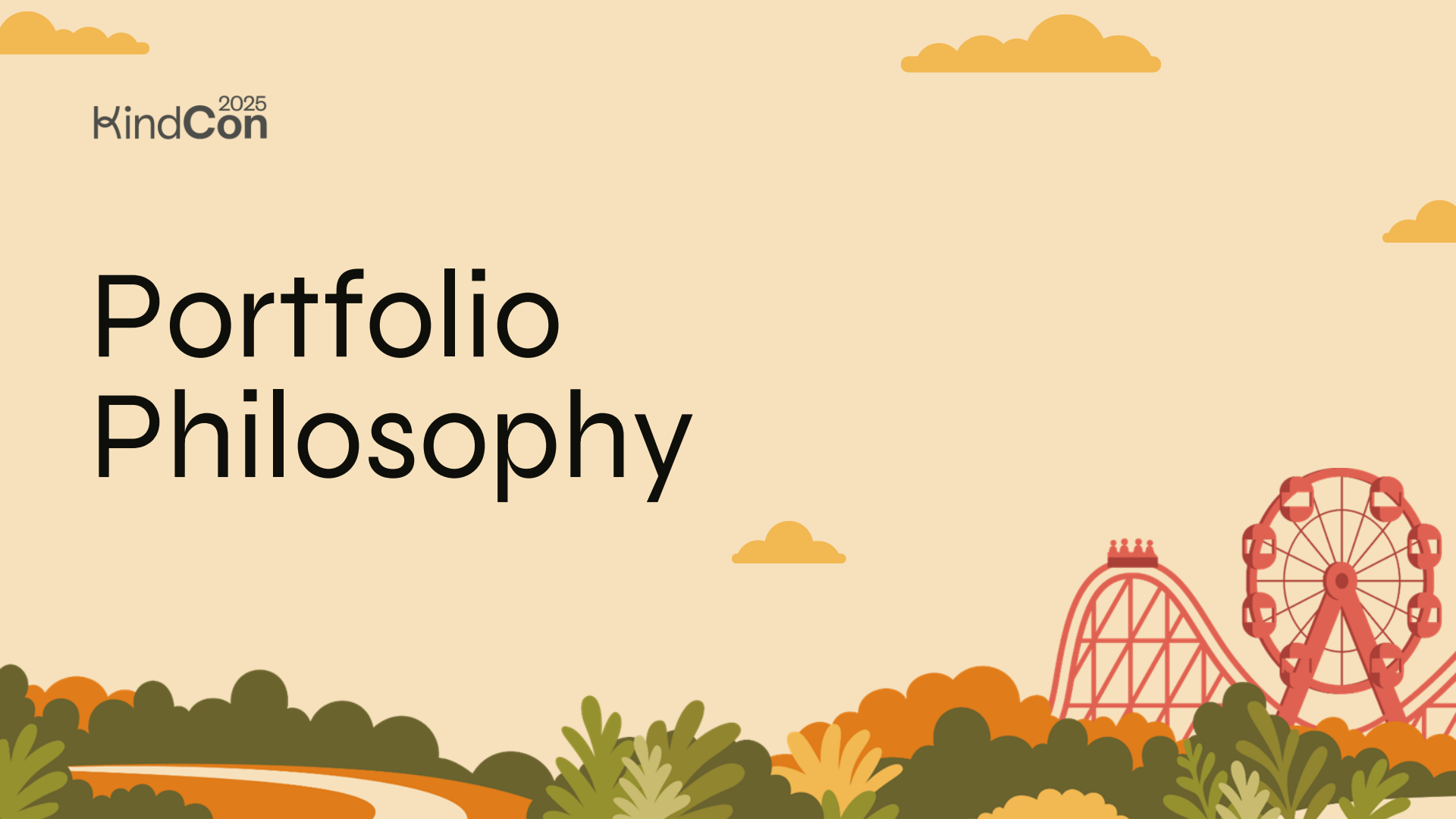
- Contextualized Metrics
- Snapshot of Pipeline Health

Coaching toward Success

- Customized Guidance
- Early Detection of Patterns
- Strategic Insights
- Collaboration



Portfolio Philosophy





There is no such thing
as “my donor.”



Gift Acquisition Portfolio Model



Prospecting
Pre-qualification



Qualifying the Prospect
Capacity? Affinity? Priority? Timing?



Portfolio of Gift Conversations
Planning for, collaborating on, and
forecasting “the ask.”



Stewardship Assignments
Intentional “thank you.”





Take “the gut” away
from Development
Officers.



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Qualification
happens before a
prospect enters a
portfolio.



Minimal Acceptable Outcome for Qualifying a Gift

1. Is this prospect **philanthropic**?
2. Does the prospect have **capacity to make a MG**?
3. Could Texas A&M (my unit or others) be a philanthropic **priority** for this prospect?
4. Are they **Ready**?

YES!

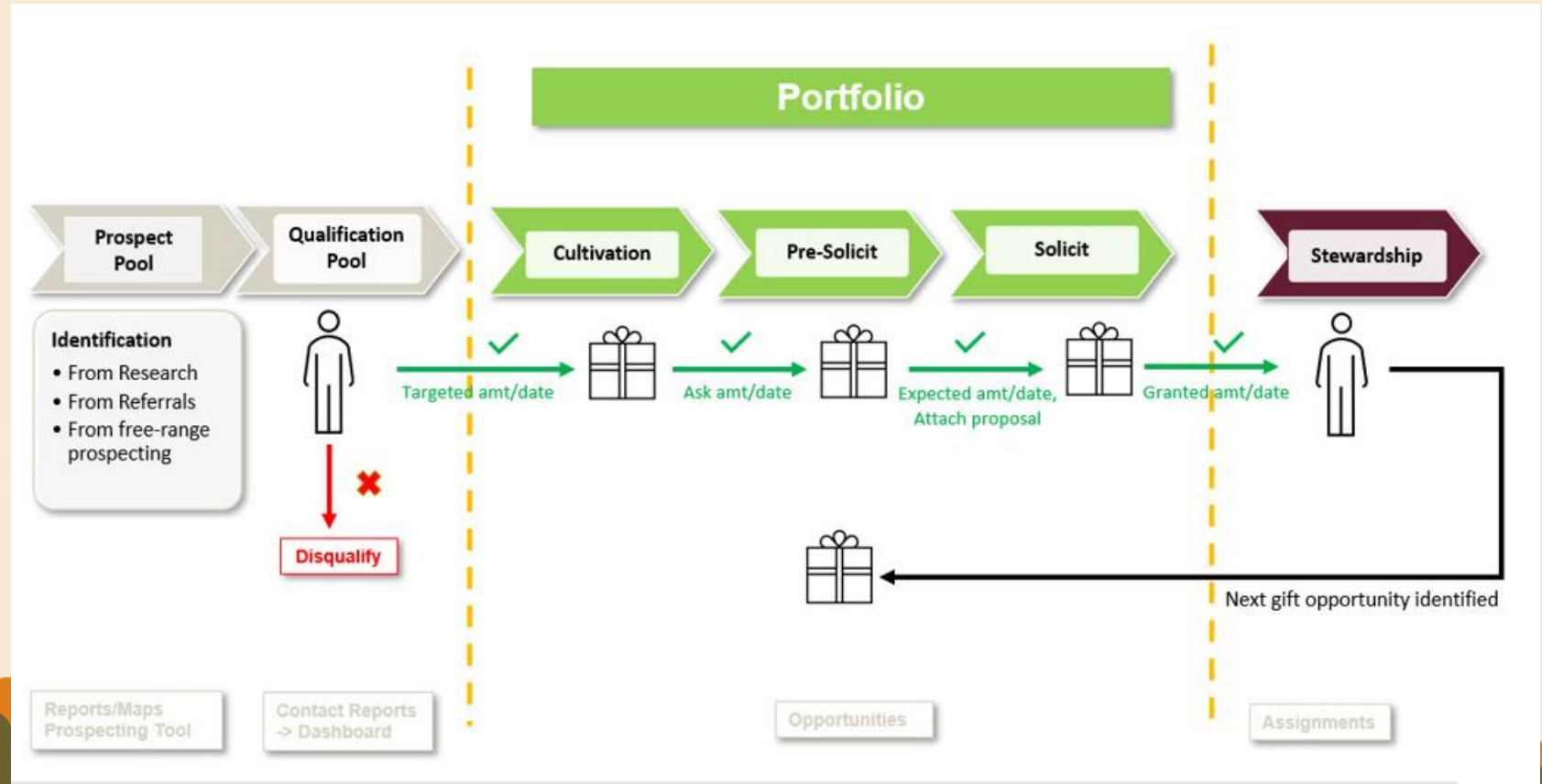
x4



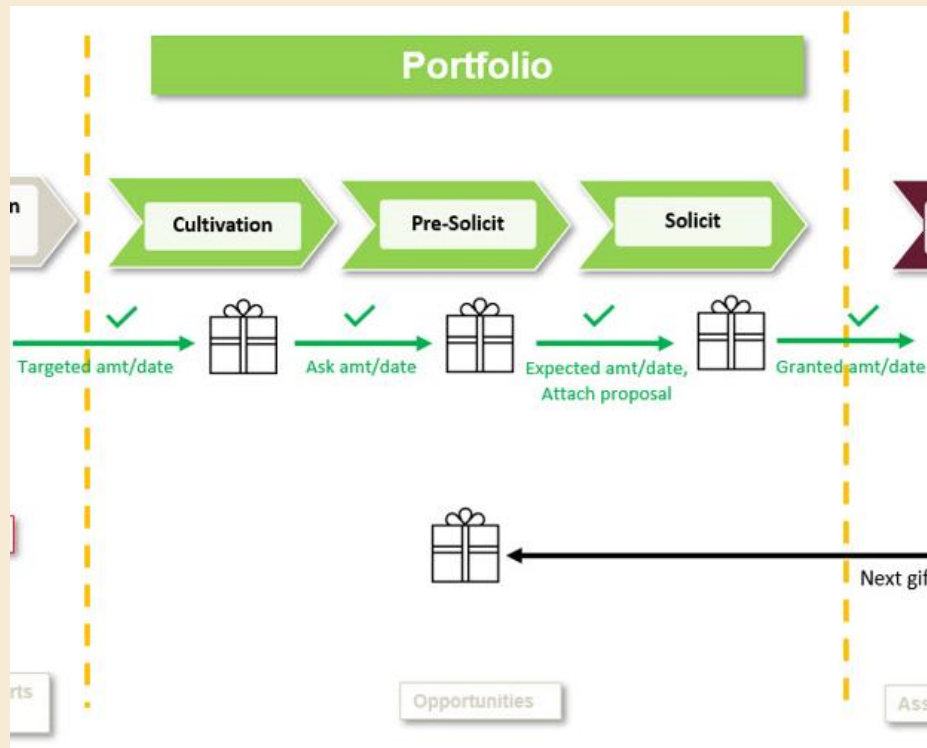
Portfolios are for gifts,
not people.



Gift Acquisition Workflow



Opportunities = Active Gift Conversations



Cultivation - [TARGET INFO]

I have qualified the GIFT and I think it is going to look like x, y, z.

Pre-Solicitation - [ASK INFO]

I know what my ask is and when I am going to make the ask.

Solicited - [EXPECTED INFO]

I have delivered a proposal and am awaiting the final decision from the donor.

Forecasting Your Next Step

Opportunity

+ Follow

Edit

Delete

Printable View

Details

Activity

Contact Reports

Real Estate

Chatter

DocuSign

Marq

Opportunity ID

N3661425

Opportunity Name

Organization Name

Constituent

Add Spouse

Type

Scholarship

Proposal Funding Type

Current - Endowed

Academic Organization

Business

Project of Interest

Donor Initiated

Lead Source

Portfolio Strategy

No Gift Recognition

Designation

Proposed Naming Component

Stage

Solicited

Opened Date

2/26/2025

Development Officer

Description Information

Description

Target Amount and Date

Target Ask Amount

\$125,000.00

Target Ask Date

4/30/2025

Ask Amount and Date

Ask Amount

\$125,000.00

Ask Date

4/1/2025

Expected Amount and Date

Expected Amount

\$125,000.00

Expected Date

8/31/2025

Granted Amount and Date

Granted Amount

Granted Date

Related

Sub Proposals (1)

D-00076859

Unit (Academic Or...

Business

Amount:

View All

Contact Roles (1)

Role:

Spouse

Title:

View All

Opportunity Team (2)

Member Role:

Gift Planning

Member Role:

Lead Development Officer

View All

Files (1)

3-31-2025 icr GA1

Apr 2, 2025 • 175KB • pdf

View All

Stage History (3)

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2025

21

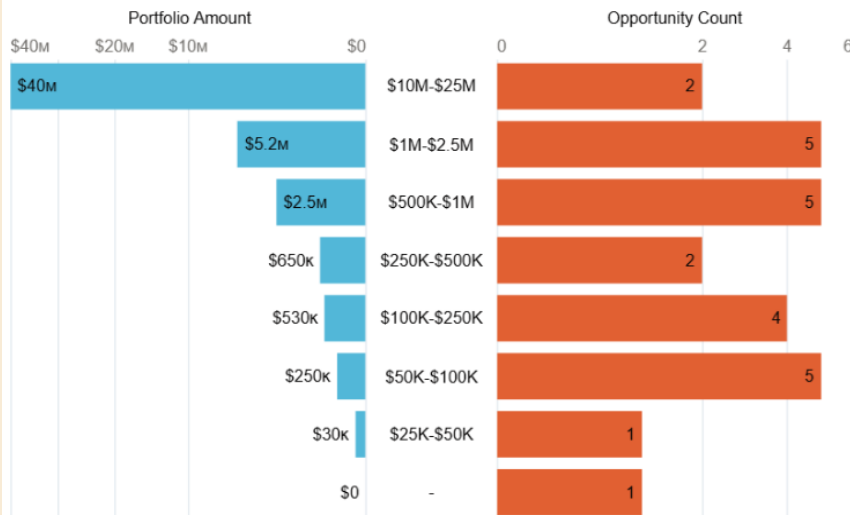


Clear is kind.

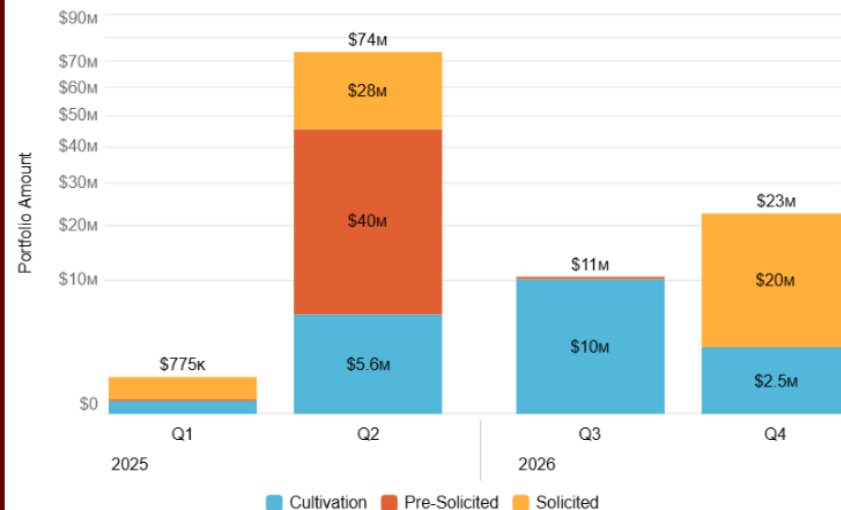
Active

Granted

Portfolio - In Solicitation



Remaining Portfolio this FY



Gift Planning: 52

Lead Development Officer: 21

Secondary: 1

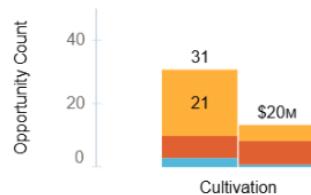
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Active Portfolio Count

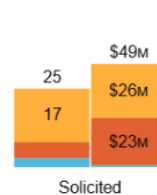
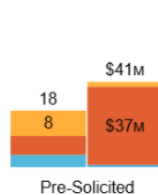
\$110,003,000.00

Active Portfolio Amount

Opportunity Count



Active Portfolio



Dollar Amount

Solo Opp
Team Opp
Team Opp - Same Unit

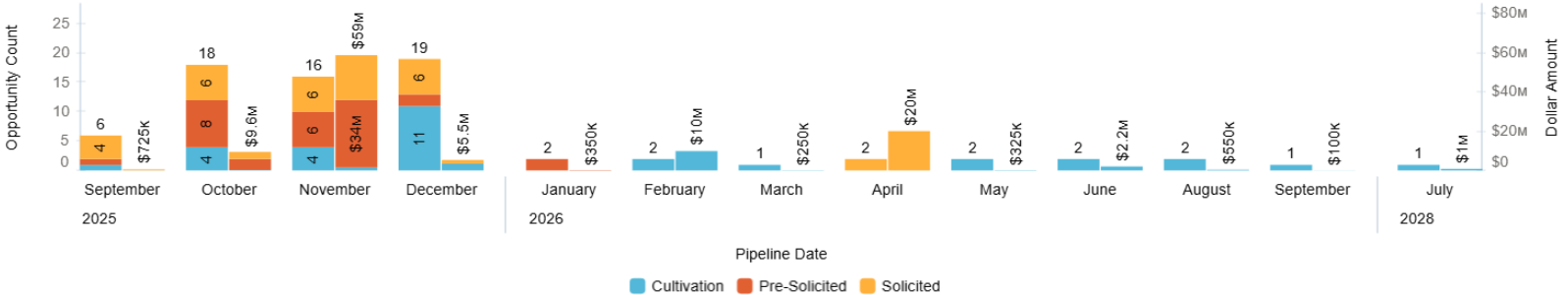
Opportunities: Missed Forecast Date



Solicited

Donor Name	Name	Days Since Last Contact by You	Stage	Team Role	Target Ask Date (Cult.)	Ask Date (Pre-Sol.)	Expected Date (Sol.)
		0	Solicited	Gift Planning	2025-06-30	2025-06-30	2025-09-15

Upcoming Opportunities



Donor Name	Name	Pipeline Date ↑	Pipeline Amount	Stage	Days Since Last Contact by You	Days in Stage	Team Role
		2025-09-30	\$25,000.00	Pre-Solicited	204	204	Lead Development Officer
		2025-09-30	\$100,000.00	Cultivation	0	140	Gift Planning

Opportunities with Data Entry Errors



■ Cultivation ■ Pre-Solicited

Donor Name	Name	Days Since Last Contact by You	Stage	Team Role	Target Ask Date	Ask Date	Expected Date
		8	Pre-Solicited	Lead Development Officer	2025-09-26	2025-09-26	2025-10-31

Opportunities with Extended Gap Since Last Contact



■ Cultivation ■ Pre-Solicited ■ Solicited

Donor Name	Name	Stage	Days Since Last Contact by You	Days in Stage	Team Role
		Solicited	86	72	Gift Planning

Stagnant Opportunities



■ Cultivation ■ Pre-Solicited ■ Solicited

Donor Name	Name	Stage	Days Since Last Contact by You	Days in Stage ↓	Team Role
		Solicited	76	1,715	Lead Development Officer

Impactful Philanthropy



1,295

Major Gifts
\$25K+

—

\$295K

Average Gift Size

—

71

Principal Gifts
\$1M+

—

Creating your own Portfolio Strategy





Ask yourself...





How can I strategically make a donor's dream a reality?

Am I being clear?

Am I being donor centric by calling “dibs?”

What is the goal of my portfolio?

Can I confirm what “my gut” is telling me?

What am I qualifying?



How am I using data to drive my fundraising decisions?



Go do something
about it.



Thank
you.