

Pipeline Outreach Day: A creative approach to prospect development in fundraising

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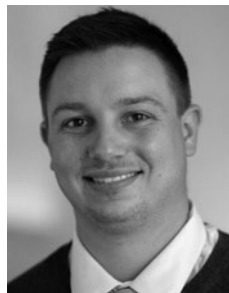


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Marcus Hardrick is an emerging prospect developer and data analyst with a unique background in the arts. Having been with Johns Hopkins Bloomberg School of Public Health just over a year, Marcus has cultivated a passion for pipeline-related work where he can apply his artistic background to data-driven projects to bolster fundraising efforts with projects such as Pipeline Outreach Day. In his free time, Marcus serves on the APRA Maryland board as their Communications Chair, travels to national parks and plays chess.

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Brett Schatz is an assistant director of development for the Johns Hopkins University Bloomberg School of Public Health (BSPH) and School of Nursing (SON). Since joining Hopkins in November 2021, Brett found a passion for pipeline work. From his start supporting the principal and major gifts team at the BSPH, to his current role serving the BSPH and the SON, Brett has worked on identifying, cultivating and stewarding donors to help build a robust donor pipeline at each division. Brett's work focuses on pipeline data and reporting within Hopkins' database, along with discovery outreach to pipeline prospects. Following in the footsteps of the BSPH, Brett helped bring the Pipeline Outreach Day event to the SON, improving the quality of leads in its pipeline and helping advance existing donor relationships. Brett holds a bachelor's degree in business administration from Towson University.

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Joanna Schofield has been with Johns Hopkins Bloomberg School of Public Health for three years, splitting her time between two separate teams. With one, she focuses on strategic planning with the Office of External Affairs on the Pipeline Development, Reporting, and Analytics team. Her second role is Director of Development for the Moore Center for the Prevention of Child Sexual Abuse. Joanna has been with Johns Hopkins for over eight years and has a diverse background, including over 20 years of leadership experiences in programme development, fundraising and sales, change management, business and data analyses, technical and development training, CRM and technical buildouts, marketing and communications, and event and volunteer management. Joanna co-leads a women's leadership group at Johns Hopkins, leads a monthly fundraising group at Maryland Nonprofits, and has previously served as the president of Apra Maryland for strategic intelligence in fundraising. She is the co-founder and president of an emerging nonprofit Professionals Who Care, which advocates for the inclusivity of caregivers in the workplace. Joanna has earned her bachelor's in international development and master's in NGO management. While she still connects with her Seattle roots as someone who loves nature, plaid shirts and waterproof shoes, she has lived in Maryland for the past 16 years with her husband. They cheer on their two adult daughters and hang out with their cat and two dogs — a sweet Labradane and goofy Great Dane.

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Abstract

This paper presents the implementation and outcomes of Pipeline Outreach Day (POD), an innovative initiative developed by the Development and Alumni Relations team at the Johns Hopkins Bloomberg School of Public Health. POD serves as a tool to enhance pipeline development by engaging a wide array of team members in prospect outreach activities. The paper discusses the background, methodology, outcomes and future directions of POD, offering insights and lessons learned that can be applied in a variety of fundraising settings.

Keywords

pipeline, donor, discovery, identification, data quality

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INTRODUCTION

The Johns Hopkins Bloomberg School of Public Health (BSPH) is one of the leading institutions globally in the field of public health. Located in Baltimore, Maryland, it was founded in 1916. The school offers a wide range of academic programmes, including master's and doctoral degrees as well as certificate programmes, in fields such as epidemiology, biostatistics, health policy and management, environmental health sciences, among others. It

is known for exemplary pedagogy and groundbreaking research, for innovative approaches to public health challenges and for its commitment to improving health outcomes worldwide through education, research, practice and advocacy.

Engaging prospective donors is a perpetual challenge for fundraising teams, work that was particularly constrained during the COVID-19 pandemic. To address the perennial challenge of connecting with donors and identifying

prospects, in 2022 the BSPH's development team devised Pipeline Outreach Day (POD). Logging over 2,000 outreach attempts, this proactive approach resulted in over 200 qualification conversations and visits with potential donors. Leveraging various communication platforms with an emphasis on innovative strategies, this initiative is now a valuable advancement strategy for pipeline development as well as a key Bloomberg School development team-building activity.

BACKGROUND

The inception of POD stemmed from an evolving fundraising landscape at the Bloomberg School, characterised by shifting resources and changing organisational structures. An external review highlighted the need for additional prospect discovery, prompting the team to pioneer new approaches to pipeline development. POD developed into a cohesive strategy to bridge the gap in engaging identified prospects. POD's primary goal is to qualify as many prospects as possible in a defined window of time. Secondary goals include lead disqualification, improved data quality and sustained engagement, all of which support long-term fundraising success for the school.

Following the success of the first POD event in early 2022, the team secured a summer intern to spearhead a landscape analysis and benchmarking exercise with peer institutions. The team initiated the project by compiling a list of organisational peers. Subsequently, the intern conducted interviews independently and with mentorship from the team, systematically collecting data and insights. The analysis of these interviews yielded valuable insights, including an absence of similar projects among peer institutions, underscoring a unique opportunity for innovation.

METHODOLOGY

POD operates on the principle of team engagement, involving staff across various roles in targeted prospect outreach activities. Leadership support has been instrumental in starting and continuing POD, ensuring alignment with organisational goals. A key aspect of the initiative's success is ensuring ongoing consideration of POD culture. Emphasis is placed on fostering a supportive and fun atmosphere, integrating elements such as themed trainings, humour and gratitude, and ensuring a synchronous experience shared across messaging platforms.

The Bloomberg School tracks its pipeline through prospect groups in a customer relationship management software (CRM). The POD team started with a Johns Hopkins University-native CRM; however, in early 2022, the database was migrated to a Salesforce CRM to which the team successfully transitioned the event. The POD team pulls names from prospect groups to ensure that the identified leads continue to be qualified and engaged. BSPH prospect groups are defined using specific data-driven criteria which include alumni status, wealth capacity, modelling scores, graduation year, age and giving history.

To prepare for POD, one or more organisational goals are developed and discussed with the leadership team. Goals include thinking about initiatives such as upcoming events or leadership travel, sharing breaking news to those with specific philanthropic interests, engagement around campaign priorities, targeting specific geographical areas or outreach gaps, among others. Organisational goals inform the development of specific criteria that in turn are used to extract lists of names from the pipeline prospect groups. For example, organisational goals might align with specific

locations, alumni interests or topics of upcoming in-person or virtual events; however, it is important to note that the more complicated the initial criteria, the longer the development effort will take. The initial analysis incorporates a list that is larger than the final list to allow for name removals, pivots or late feedback — without having to reanalyse additional prospects. The implementation team reviews the selected names, thoughtfully allocating them based on an array of factors, such as fundraiser-assigned territory, upcoming travel, past contact reports, degree information, philanthropic interests and more. Each POD outreach caller is assigned approximately 20 names. Within each list, most of the names are warmer leads to provide a higher probability of some engaging conversations and a smaller portion of the list contains colder leads; this ensures the pipeline is successfully churned. A warmer lead is identified by reviewing past contact reports and giving.

Each outreach caller participating in POD accesses their resources in a shared drive, which includes scripts, a list of engagement opportunities, a contact report spreadsheet to collect the multiple actions per prospect and a data spreadsheet to collect updates on contact information and prospect insights. The outreach callers conduct pre-event outreach, synchronous phone calls (the official POD) and post-event communication, as described in the following two sections ('Communication efforts' and 'Communications schedule').

Following the final outreach, the spreadsheets are collected, combined and cleaned with a data quality review and data standardisation process. The outreach team members utilise unique keywords in the contact reports to enhance the ability to later pull and

analyse the data. For example, if someone speaks with a prospect interested in food security, that keyword is added to the spreadsheet and later entered into the CRM by the administrative team.

Following outreach, prospects are assessed for further qualification efforts. The prospect engagement categorisation system is structured to optimise outreach efforts effectively. A prospect categorised as 'hot' is more likely to receive immediate assignment to a fundraiser portfolio due to their high potential for making a major gift or leadership annual gift within the next two years. Prospects categorised as 'warm' are earmarked for retention in the BSPH pipeline. While they may not have immediate giving potential, regular engagement could cultivate major gift opportunities in the future.

'Cold' prospects, however, are further subdivided based on responsiveness. Those determined to be 'cold' because they did not respond are not immediately disqualified; instead, potential issues such as incorrect contact information are recognised and therefore the prospect is retained so that efforts can be made to update contact information. Finally, prospects categorised as 'cold-disqualify' are either temporarily ineligible for engagement, with plans for re-evaluation in the future, or permanently disqualified due to circumstances such as dementia or adverse response to outreach. These individuals are placed into an exclusion group for future outreach and reassessment in three years. This systematic approach ensures targeted and efficient allocation of resources pertaining to prospects with the highest potential for impactful giving.

Immediate POD metrics are gathered via Excel and then entered into the CRM, including prospect qualification or disqualification, substantive

actions completed, assignments made, contact information updated and any insights gained regarding immediate gifts or about the prospect. Three to six months later, two post-POD activities occur. First, a team member will conduct additional outreach with those prospects who were not successfully engaged but were determined to have valid contact information. For example, the original POD engagement date was not convenient for the prospect. Second, an additional analysis is completed to determine the number of gifts received and number of people who participated in follow-up engagement activities with the school. In this analysis, the team includes qualification and data intelligence information so that the outcomes are viewed through a more holistic lens rather than solely on immediate gifts received. Evaluation results are shared with the team and leadership.

Communication efforts

POD strategy unfolds within a condensed time frame, typically spanning one week. The first step consists of an initial e-mail approximately five business days before the event, with the goal of scheduling a phone call. If the prospect has not responded within 48 hours, a POD team member follows up with a second e-mail. After these initial e-mails, the POD team members make phone calls to their lists of prospects on the event day. These phone calls offer a direct and impactful avenue for connection.

Finally, to maintain the rhythm of engagement, prospects receive a final follow-up e-mail one to two days after the phone calls have taken place. These follow-up e-mails are sent within the same week as the call to ensure that communication is timely and effective. This

approach not only maximises impact but also respects a prospect's time and priorities. Additionally, throughout the outreach efforts, the POD team operates from a virtual office environment, allowing for concurrent collaboration and co-ordinated outreach efforts. This ensures a cohesive approach to engagement.

Communications schedule

- *Initial outreach.* The outreach team member sends an e-mail (see Figure 1) to verify each prospect's contact information. This ensures smooth communication channels from the outset.
 - *Scheduling considerations.* Understanding the value of a prospect's time, the outreach team member e-mail should include the date by which an outreach call will be made, offering the prospect the opportunity to respond and reschedule if necessary. Different time zones are considered before making calls. It is helpful to think about when prospects might be available to take a call (during a lunch break or after work, for example).
- *Second e-mail.* The team member sends a follow-up e-mail to prospects who have not responded to the initial outreach. This e-mail reaffirms the initial outreach intentions and again includes the date when the team member plans to call the prospect.
- *Phone call.* Phone calls are made to prospects on the designated outreach day, with the goal of connecting with the prospect and learning about their experiences with BSPH. This helps determine if a prospect would like to be involved with the school in the future and in what way. Team members do not make solicitations during these phone calls, which are meant to remain focused on engagement with the individual, providing

Dear FIRST NAME,

I'm FUNDRAISER NAME, a/an JOB TITLE at the Johns Hopkins Bloomberg School of Public Health. I believe public health's potential is enormous, particularly when it comes to addressing the daunting and complex health challenges our world faces. The Bloomberg School community—our educators, researchers, practitioners, and students—is up for the challenge. We are motivated, inquisitive, and committed to finding solutions.

I'd love to chat with you to learn about your experience with the Bloomberg School and discuss the School's impact across the public health field and in the community. I'll give you a call on Wednesday, May 8, using the number we have on file for you, PHONE. If that number is not correct or if you'd prefer to chat another time, just let me know!

Looking forward to hearing from you.

Best,

FUNDRAISER NAME

FIGURE 1 Part of the script the team uses when conducting e-mail outreach to prospects

school updates relevant to that prospect's relationship with the school.

- *Follow-up.* Within 48 hours of the phone call outreach, the team member sends a final follow-up e-mail to all contacted prospects. Whether a conversation took place, an incorrect or out of service number was dialled or if a voicemail was left, each prospect receives communication tailored to the specific outcome of the phone outreach.

Technology

The experimental mindset and flexibility of POD culture enables frequent assessment of the viability and effectiveness of different outreach platforms. Platforms tested during POD sessions have included Calendly, LinkedIn Sales Navigator and ThankView. Calendly supports streamlined scheduling, which allows outreach team members to seamlessly co-ordinate time slots for their calls. LinkedIn Sales Navigator provides a less traditional directive that targets

and engages with key prospects more strategically. ThankView provides a personal touch to communications through personalised video messages. While the team does not regularly use all these platforms, the platforms have provided an opportunity to test out methods and technologies for enhanced POD strategic communication efforts.

Participants and roles

The BSPH welcomes staff from all office of external affairs units to participate in POD. A team member may assist with any of five different roles, including pipeline, communications, outreach, institutional knowledge and administrative. The pipeline team is responsible for the development of criteria, logistical co-ordination of the entire initiative and for making prospect assignments. The communications team is responsible for crafting compelling messages to share with a prospect, including writing scripts for different scenarios or developing a

theme or focused message. The outreach team member then takes the draft scripts and personalises them. The institutional knowledge team is responsible for offering insight into the history of the organisation and is typically comprised of long-serving staff members, or an individual who knows the organisation very well. This team is crucial to the POD effort because frequently older prospects ask questions about faculty or a project from their era, but the outreach team member does not have historical context. By consulting with the institutional knowledge team member, who is 'on call' throughout the POD effort, the engagement can be more relevant and personal. The administrative team is responsible for the data management surrounding POD and ensures the data is successfully loaded into the CRM. The collective work of these teams makes POD successful.

In welcoming team members from varying roles to complete this collective work, POD serves as a great opportunity to introduce staff to advancement work with which they are not familiar or regularly interact. POD is a voluntary initiative, meaning that staff members are recruited on a volunteer basis to participate. This allows staff members with varying skillsets to participate in pipeline development and frontline work, providing them with professional development opportunities within a focus area different from their own. Because POD is mostly synchronous, more seasoned staff can work with newer staff to provide shadowing opportunities.

OUTCOMES

The multifaceted benefits of POD became evident through successive iterations. Notable outcomes include the ability to

qualify a substantial number of prospects, enhance data integrity through updated contact information and cultivate a supportive team culture. Feedback through survey results and debrief meetings facilitate ongoing POD refinement, ensuring its relevance and effectiveness in prospect development endeavours. To measure the success of POD, all POD team members complete a post-event evaluation. The team conducts surveys and feedback sessions with all the POD team member participants. POD events at BSPH are held about twice per year. Outcomes from a recent POD are as follows:

- individual prospects identified: 127
- conversations with prospects: 31
- contact information updated: 26
- new assignment to fundraiser portfolios: 6
- new gifts and pledges (measured six months after event): 61

There is a time commitment to any successful initiative like this one. In a survey conducted after the event, results showed that outreach team members spent about 2.5 hours each making outreach calls, 1 hour conducting e-mail outreach ahead of and after the event and 1.15 hours documenting collected data intelligence and entering into spreadsheets. Additional unaccounted staff time not collected in the survey includes time spent developing training tools, holding training meetings, building the prospect lists, organising the spreadsheets, writing the phone and e-mail scripts and entering the data into the CRM. The inaugural POD event requires the most planning, training and managing, with subsequent events requiring less time and fewer resources.

POD has benefited the BSPH prospect pipeline in several ways. It provides

a short-term energy burst on pipeline cultivation, allowing the team to ensure prospects are being engaged and not allowed to sit idle. It provides qualification and disqualification information so that the pipeline continues to be strengthened. POD also helps to improve constituents' data integrity by archiving outdated contact information and adding updates, thereby improving the school's future outreach. It also provides critical prospect insights that can offer lasting benefits, such as identifying philanthropic interests that can be used for specific funding opportunities or learning a prospect's affinity for faculty or fellow alumni for potential crowdfunding opportunities. In sum, the short-term investment in a POD programme ensures long-term success for development and alumni relations endeavours.

An additional outcome relates to how POD benefits a team's culture. The process of collecting survey feedback, hosting debrief meetings and making the team part of the event's evolution encourages and supports collegiality and team performance.

A key component to POD success is to maintain an experimental mindset. Not every call will be perfect, and many times prospects will not pick up the phone. Having a team-oriented atmosphere on the POD event day when team members conduct these 'cold calls' makes this crucial advancement work easier and more fun.

FUTURE DIRECTIONS

Continued enthusiasm among all BSPH fundraisers for the POD work effort underscores its potential as an ongoing prospect development tool. Plans for future iterations include refining

outreach strategies, testing additional new technologies such as using artificial intelligence (AI) for donor insights and texting as a communications method to reach prospects. Insights gleaned from the Bloomberg School's experience may offer valuable guidance for teams seeking to implement similar initiatives in their organisations.

The Bloomberg School has tested mobile phone texting as a form of outreach apart from POD. The team has used texting to invite prospects to BSPH events and has observed an increase in enrolment rates for these events, indicating its effectiveness in engaging prospects. Additionally, BSPH has seen higher response rates from individuals unable to attend, but who are interested in staying connected with the school, showcasing the versatility and accessibility of this communication channel. Given these promising results, BSPH is eager to leverage texting for POD initiatives in the future, recognising its potential to enhance engagement and drive further outreach success.

The BSPH advancement team is interested in exploring AI donor insights as a tool to further customise outreach to prospects. For example, AI can tell us when and how a donor would like to be contacted and can use information from across large data sets to establish donor patterns and interests. Understanding and using AI is a burgeoning area within the development and fundraising sector. As more AI tools become available to ascertain how prospects want to be communicated with, what they're interested in, when they plan to donate and how they want to be engaged, such applications will refine outreach tactics and may prove to be an effective approach to increasing prospect engagement.

CONCLUSION

The BSPH POD programme has met with significant success by both quantifiable and qualified measures, underscoring its adaptability and relevance for diverse fundraising contexts. Most importantly, a POD approach can be adjusted to meet any team's needs, including in non-higher education fundraising settings. A small non-profit or a larger healthcare fundraising team could utilise

smaller or larger prospect lists with different criteria, customised to meet their unique needs.

The BSPH POD exemplifies a novel approach to prospect development, blending collective engagement, structured outreach and team-building elements to enhance fundraising effectiveness and serves as a testament to the transformative power of innovative initiatives in advancing philanthropic endeavours.