Prospect Management Policy Appendix A: Expectations of Prospect Management

The following expectations are based on industry standards and are intended to be articulated in Prospect Managers' job descriptions and performance metrics.

1. A typical portfolio size for a Major Gift officer (MGO) is 150; for a Principal Gift officer (PGO) the typical size is 75.

2. Each officer is expected to have 150 (MGO) or 75 (PGO) face-to-face meetings annually.

3. The ideal balance within an officer’s portfolio is 1/3 in qualification, 1/3 in cultivation and 1/3 in solicitation, with a goal of achieving:
   a. 2 proposals monthly;
   b. At least 8 solicited major gifts closed (1/3 of proposals) annually; and
   c. 2 planned gifts closed or bequests recorded annually.

4. Prospect Managers will actively engage and support senior administrators, deans and faculty in the fund-raising process. Optimally, each dean will see 75 people face to face per year, seeing their top 10 to 20 prospects three or four times annually.

DEFINITIONS

There are no definitions for this Appendix.

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