

Approval Date: October 21, 2011

Parent Policy: [Prospect Management Policy](#)

Prospect Management Policy Appendix A: Expectations of Prospect Management

Office of Administrative Responsibility:	Office of Advancement
Approver:	Chief Advancement Officer

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

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