

Development Portfolio Management KQED/San Francisco

To help in better managing special accounts in KQED's annual major gifts program, a select group of accounts have been flagged with a special project, called Development Portfolio, in Team Approach. On a weekly basis, portfolio managers review their assigned prospects, and develop strategies for the stewardship of donors and cultivation of new gifts.

Procedures for creating and using weekly report:

KQED develops and maintains weekly portfolio tracking reports. All refinements and changes to the reports are based on changing and evolving circumstances. These changes are made in Team Approach, under the project page of each account. Then, a query (please see query parameters listed below) is performed once per week and exported into FileMaker. Then, an ad hoc (one time use) report is created and reviewed by each Project Manager to determine changes strategies for the stewardship and cultivation gifts.

The Team Approach Query is as follows:

Parameters:

All Accounts that have a special coding called "Devel", indicating that these accounts are part of a special portfolio project.

Output:

ACCOUNT_ID
ALPHA
NAME LINE
SALUTATION_1
SALUTATION_2
SALUTATION_3
EXTRA_1
EXTRA_2
ADDRESS
CITY_STATE_ZIP
DEVEL_STS
DEVEL_PRIOR
DEVEL_ACCT_MGR
DEVEL_NOTES
EXPIRATION
RENEW_AMT
PLG_AMT
PAID_AMT
RENEW_DATE
LAST_PLG_AMT
LAST_PD_AMT
LAST_DATE
HON_SS
DEVEL_STAGE
CMP_PLG
CMP_PAID