

Apra Plug In to

PORTFOLIO OPTIMIZATION

Nov. 9-10, 2026



Day 1 - Monday, November 9, 2026 | 11 a.m. - 3:45 p.m. ET

11 - 11:05 a.m. ET

Welcome & Introductions

Join us for a welcome from Apra Volunteers and Apra President, followed by a brief logistics overview before the start of our first session at 11:05 a.m. ET

11:05 - 11:50 a.m. ET

Session 1: Optimization at Notre Dame: Downsizing 100 Portfolios in 90 Days

This presentation provides an overview of Notre Dame's recent Portfolio Optimization project including the lead-up, the process, the outcome and potential future challenges. It will feature discussion of Notre Dame's current portfolio model, the reasons optimizing became necessary and the timeline in which optimization was completed. Key points of emphasis will also include the way trusted partnership between the Prospect Management team and frontline fundraisers, enabled more manageable portfolios, encouraged collaboration and increased overall portfolio movement and efficiency.

Speaker: Annabelle Hilson, Prospect Management Consultant, University of Notre Dame

11:50 a.m. - noon ET

Break

noon - 12:45 p.m. ET

Session 2: Portfolios by Purpose: Maintaining the Right Portfolio for the Role

In this session, we'll explore how clearly articulating a portfolio's purpose will support determining its best size, composition and health benchmarks. Participants will learn how portfolio purpose influences size, prospect composition, activity expectations and portfolio health measures and how to adapt standards to reflect varying levels of relationship complexity and fundraiser capacity. Whether you're building portfolio standards for the first time or refining an existing model, you'll leave with actionable approaches for creating role-specific portfolios that support stronger fundraising outcomes.

Speaker: Ashley Mick, Senior Director of Prospect Management, LSU Foundation

12:45 - 1:45 p.m. ET

Lunch

1:45 - 2:30 p.m. ET

Session 3: Major Gift Metrics and Portfolio Optimization: Six Years of Results

Six years ago, the University of Iowa Center for Advancement undertook a project to reform Major Gift Officer metrics and redefine how we think about prospect portfolios. We set out to improve our fundraising performance while improving our culture and now with longitudinal data, we demonstrate the effectiveness of our new model. In addition to our actual outcomes, we share the evolutions of this project as a model for collaboration between Data Science, Prospect Development and Fundraising Leadership to accomplish enterprise-level objectives.

Speakers: R. Kent Clark, University of Iowa, Nicholas Teff, University of Iowa, Janet Weimer, Executive Director, Prospect Development, University of Iowa Center for Advancement

2:30 - 2:45 p.m. ET

Break

2:45 - 3:30 p.m. ET

Session 4: From Resistance to Partnership: Building Buy-In for Corporate Portfolio Optimizations

Building trust with fundraisers and making portfolio optimization feel like a truly collaborative process can be hard work! Join Megan and Emily from UNICEF USA as they share how they shifted the relationship between Prospect Development and UNICEF USA's Corporate and Civil Society Partnerships Team from fundraiser pushback to a successful strategic partnership. They'll explore how portfolio optimization meetings became a key driver of this relationship reset and helped establish Prospect Development as a trusted thought partner. Attendees will leave with practical ideas for working through resistance, building fundraiser buy-in and strengthening collaboration with institutional fundraising teams.

Speakers: Emily Cooper, Manager, Prospect Intelligence UNICEF USA and Megan Horton, Manager, Relationship Management, UNICEF USA

3:30 - 3:45 p.m. ET

Day 1 Closing and Logistics

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Day 2 - Tuesday, November 10, 2026 | 11 a.m. - 3:45 p.m. ET

11 - 11:05 a.m. ET

Welcome & Introductions

Join us for a brief logistics overview for Day 2 before the start of our first session at 11:05 a.m. ET.

11:05 - 11:50 a.m. ET

Session 5: The Purge: Transforming Prospect Hoarding to Portfolio Health

Gift Officers often hold onto prospects they believe have potential, even when they no longer meet the Foundation's guidelines for active management. This "keep them just in case" mindset can lead to stagnant portfolios and less capacity to engage stronger prospects. To address this, the NDSU Foundation created "The Purge", an annual collaborative exercise that helps Gift Officers confidently evaluate, disqualify and release prospects who are no longer a strategic fit. Developed through a partnership among Prospect Management, Prospect Research and frontline Gift Officers, "The Purge" provides a structured, data-informed process to "Bless and Release" prospects without hesitation or guilt. Wealth screenings, concise research profiles and relationship-management insights give officers the information they need to make informed decisions and let go of prospects without meaningful activity. The process has sparked more candid conversations about portfolio composition and created a supportive environment where officers feel comfortable disqualifying prospects year-round. The result is a healthier, more focused portfolio that aligns with organizational priorities and allows Gift Officers to spend more time cultivating the most promising relationships.

Speaker: Miranda Rutten, Director of Development Operations, North Dakota State University

11:50 a.m. - noon ET

Break

noon - 12:45 p.m. ET

Session 6: Portfolio Management and Optimization Using Data Modeling

Development officer portfolios often suffer from low penetration rates, characterized by oversized prospect pools and stagnant relationships. To address this challenge, Michigan State University (MSU) established a strategic workgroup to realign portfolio capacity with actual development officer bandwidth.

This presentation outlines MSU's approach to right-sizing portfolios while empowering Development Officers to prioritize high-value prospects. We will share recommended changes to portfolio composition and consultation processes and comparative results from peer institutions. Additionally, we will discuss how MSU's analytics team deployed predictive scoring models—including Proposal Likelihood, Best Unit Propensity, Planned Gift Propensity and Stage Transaction Likelihood—to guide prospect selection.

Speakers: Matt Phelan, Prospect Development Consultant, Michigan State University, Chet Hodges, Matt Riggs

12:45 - 1:45 p.m. ET

Lunch Break

1:45 - 2:30 p.m. ET

Session 7: Evolving from Data-First to Policy-First Portfolio Management

Join us for a virtual learning experience focused on practical, tested strategies for defining and strengthening your organization's portfolio. Learn how the University of Michigan is navigating complex data and structural hurdles by shifting from a data-first to a policy-first approach. Michigan speakers will share their interactive onboarding strategy using anonymized portfolios, how prioritizing policy intent allows for flexible yet practical prospect assignment strategies and key lessons from Michigan Medicine's major health system CRM migration.

Speakers: Emily Carter Sharpe, Prospect Management Analyst, University of Michigan Office of University Development Prospect Development & Analytics, Marion Chaloux, Prospect Management Analyst, University of Michigan and Kristin Moser Gill, Assistant Director of Prospect Developments, University of Michigan

2:30 - 2:45 p.m. ET

Break

2:45 - 3:30 p.m. ET

Q&A Panel

Panel: Matt Phelan, Chet Hodges, Matt Riggs, Miranda Rutten, Ashley Mick

3:30 - 3:45 p.m. ET

Event Wrap Up