

Harness Your Data, Transform Your Campaign

JAA ANNUAL CONFERENCE

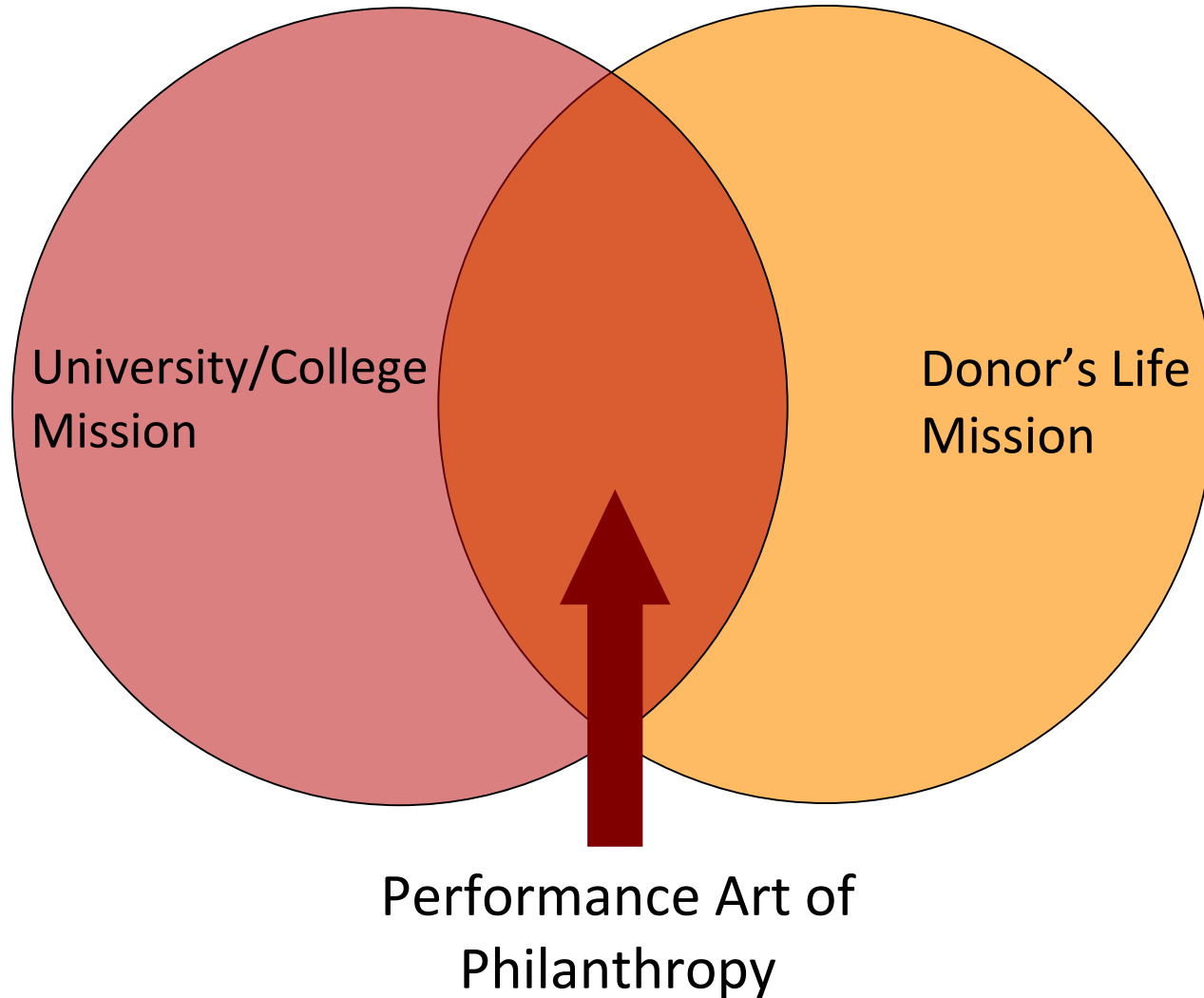
MILWAUKEE, WI

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Campbell & Company

Advancement Planning • Fundraising • Communications • Executive Search

The Philanthropic Exchange



Agenda

- Importance of Relationship Building in Fundraising
- Data available to help prioritize time/resources
- How to use the data
 - Wealth Screening
 - Engagement Scoring or Predictive Modeling
 - Using scores and ratings to build gift table
 - Assessing portfolios and stages
- How to use this in practice

Wealth Screening

- What is it?
 - Online search for publically available information
- What does it give you?
 - Focus on assets
 - Yields Capacity
 - Gift potential over 5 five years to all philanthropic interests
- How is it done?
 - Outsourced to vendor
 - Conducted in-house using vendor's online tools

Scoring and Modeling



RFM Scoring

Engagement
Scoring

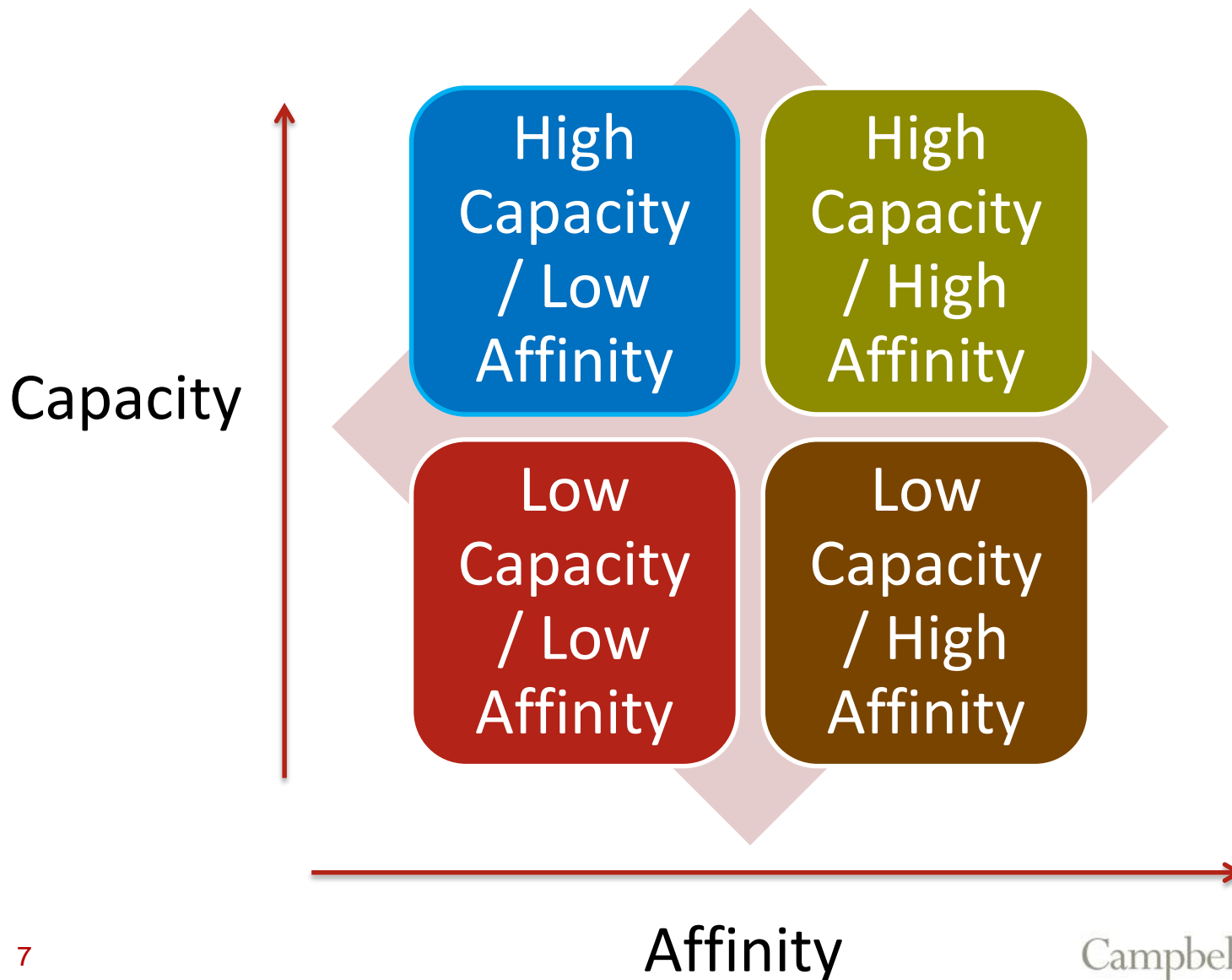
Predictive
Modeling

- What is it?
 - Uses giving and behavior data to develop scores
- What does it give you?
 - Focuses on affinity
 - Yields a variety of scores
- How is it done?
 - Conducted in-house using simple or more complex programs
 - Outsourced to vendor

Using scores and ratings to build gift table

	Sample Gift Table: \$100M Campaign				Current Prospect Pool		
Gift Level	Gifts Needed	Qualified Prospects Needed	Subtotal	Cumulative %	Prospects Identified	Prospect Gap	Future Prospects Identified
20,000,000	<i>Ideal, not included in table</i>						2
10,000,000	1	3	10,000,000	10%	2	(1)	4
5,000,000	3	8	15,000,000	25%	4	(4)	8
2,500,000	4	7	10,000,000	35%	5	(2)	12
1,000,000	10	21	10,000,000	45%	20	(1)	33
500,000	19	38	9,500,000	55%	43	5	47
250,000	35	68	8,750,000	63%	87	19	112
100,000	86	191	8,600,000	72%	251	60	234
50,000	167	342	8,350,000	80%	289	(53)	480
25,000	323	650	8,075,000	88%	413	(237)	1765
Smaller	Many	Many	11,725,000	100%		Many	

Reviewing Portfolios



Reviewing Stages (Sample)

Stage	Goal	# of Substantive Interactions	Length of Time (Months)	Next Steps, if unable to "Move"
Identification	Identify wealth	Prospect research/mgmt; no frontline contact		
Qualification	Confirm wealth; identify affinity	1	3	DQ "Unresponsive" after 6-8 contact attempts
Cultivation	Engage prospect; develop strategy; involve partners	3-4	12-18	Review in Relationship Mgmt meeting; Diagnose lack of movement (e.g. no contact); Determine whether prospect should be removed, reassigned or retried
Solicitation	Execute strategy Make the ask	1-2	3	
Stewardship	Thank and recognize appropriately; Continue to engage; Determine when to re-qualify for next gift	1-2 annually	Varies based on pledge period; aim for re-qualification by last year of pledge	

Questions and Discussion

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