DATA ANALYTICS

Alumni giving is the financial backbone for many universities and colleges, as are grateful patients for hospitals, or members for museums, and with growing reputation and impact of your organization in the community, it is likely to remain so in the future. We offer the following analytical tools to assess historical donor trends and future giving potential:

1. **TRANSACTIONAL GIVING ANALYSIS**

   Using a standardized definition of a major, regular or annual gift, we will prepare a data request for transactions for up to the past ten years. Based upon our quantitative analysis process of these transactions, we will examine trends in donor acquisitions, renewals, upgrades/downgrades, average gifts, solicitation strategies (mail, phone, email, personal visit and other) and giving standards. We will be able to benchmark these against a small pool of comparative organization where data is available. You will get a clear understanding of the strengths of your giving program and where you should focus your efforts for the greatest improvement and returns.

2. **DONOR PIPELINE ANALYSIS**

   Of critical importance in evaluating the potential for your organization is a solid understanding of the state of readiness of the major and annual donor pipeline.

   A key outcome of a donor pipeline analysis is an assessment and development of donor group profiles for both existing donors and non-donors. The use of psychometric profiles, will be utilized to compare giving potential of non-donors with donors.

   A prospect scoring system will be used to refine the prospects "discovered" through the use of donor group profiles and a robust prospect development process will be developed for both existing donors (ideally, to move them into the next higher giving level) and for non-donors (ideally, to secure new donors and new donors at various giving levels).

   The development of prospect lead lists will look at three critical elements:

   a) a review and analysis of the of the existing major donor database using RFM (Recency, Frequency, and Monetary);

   b) creation of donor group profiles based on giving levels;

   c) scoring of prospects to produce prospect lead lists for both existing donors and non-donors.