



Education
Advisory
Board

Advancement Forum

Advancement by the Numbers

Using Data to Inform Strategy, Improve Performance, and
Secure Resources



September 19, 2014

San Jose State University

San Jose, California

Data-Driven Solicitations



Colorado State University

Fort Collins, Colorado
29,000 Students
Public Research

Colorado State had a wealth of data at its fingertips—both purchased and internally tracked. Understanding that a series of discrete data points is difficult for frontline staff to interpret and act on, research staff developed a suite of scores designed to inform solicitation efforts and make sense of a long list of data points.



Key Animating Principles

- CSU combined discrete data sources into a simple scoring system that frontline staff could easily understand and interpret
- Scoring indicators enable gift officers to better prioritize, approach, and solicit prospects
- The system's ease of use and corresponding user-friendly interface has facilitated quick adoption and ensures up-to-date, accurate information

Data-Driven Solicitations

Readily Understandable Indicators Focus Strategy and Activities

The Problem

How Does a Gift Officer Make Sense of Multiple Data Points?

What does household wealth actually mean for likelihood to give?

How do I prioritize prospects to meet my visit and dollar goals?



Do I discount net worth for a short giving history?

Has this cultivation reached a turning point for solicitation?

The Solution

Solicitation Readiness Scale & PAR Score

Solicitation Readiness Scale

- Incorporates multiple data points quantifying interaction with institution into one score on a scale of 1-1,000
- Provides clear, concise indication of prospect's major gift approachability
- Conserves gift officer time and effort by enabling alignment of gift officer activity with prospect readiness

Potential Ask Range (PAR) Score

- Incorporates multiple data points about individual into one score on a scale of 1-1,000
- Provides clear, concise indication of individual's likeliness and capacity to give a gift within 1 year in a specific dollar range
- Enables stronger targeting of solicitations and better prioritization of prospects within portfolio



Setting the Stage

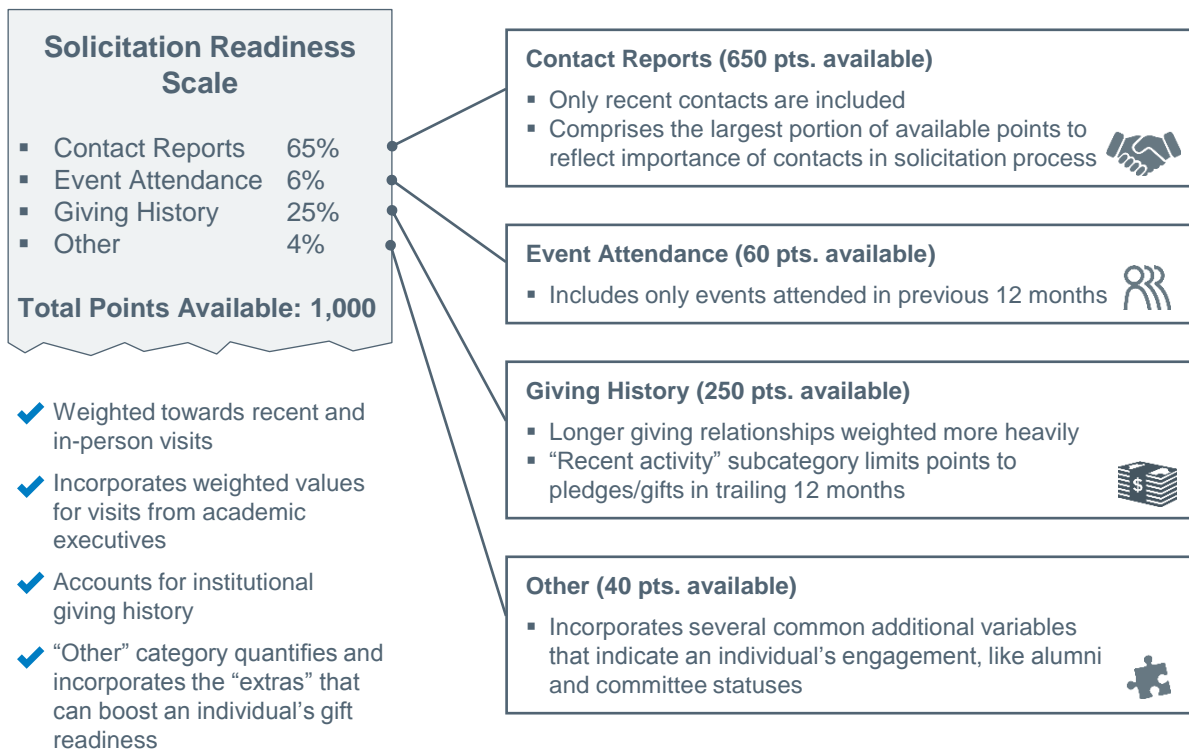
“With the abundance of data now available...it became imperative to develop a scoring or rating system which would be an easy-to-use, conservative, and realistic estimate of an individual’s giving capacity. Without such a mechanism in place, staff would end up spending an inordinate amount of time analyzing data instead of putting the information to use.”

Colorado State University Statement on PAR Score

Score 1: Solicitation Readiness Scale

Components Weighted Toward Most Significant Types of Contact

6



Solicitation Readiness Scale: Score Breakdown

In-person Visits		Avail. Points
1 Visit	0-3 Months	75
	3-6 Months	50
	6-12 Months	25
	Subtotal	150
2+ Visits	0-3 Months	50
	3-6 Months	50
	6-12 Months	25
	Subtotal	125
More Than 1 College/Unit	0-3 Months	50
	3-6 Months	25
	6-12 Months	25
	Subtotal	100
Dean Or Higher	0-3 Months	25
	3-6 Months	25
	6-12 Months	25
	Subtotal	75
At Least 1 Visit In Past Years	2 Years Past	25
	3 Years Past	25
	Subtotal	50
Total In-person Potential Points: 650		

Contact Categories

Engagement Categories

Phone Visits		Avail. Points
1 Telephone Call	0-3 Months	45
	3-6 Months	20
	6-12 Months	20
	Subtotal	85
	Total Phone Potential Points: 100	
2+ Telephone Calls	0-3 Months	5
	3-6 Months	5
	6-12 Months	5
	Subtotal	15

Giving		Avail. Points
Recent Activity	0-12 Months (1 Gift/ Pledge)	125
	0-12 Months (2+ Gifts/ Pledges)	25
	Subtotal	150
Recent Activity Sum	0-12 Months (Cumulative \$1,000+)	25
Year of Giving	2-5 Years	10
	6-10 Years	25
	11-15 Years	45
	16+ Years	75
Total Giving Potential Points: 250		

Correspondence		Avail. Points
Email or Traditional Mail, at Least 2 Instances	0-3 Months	30
	3-6 Months	15
	6-12 Months	5
	Subtotal	50
	Total Phone Corr. Points: 150	

Events		Avail. Points
Recent Attendance	0-6 Months (1 event)	25
	0-6 Months (2+ events)	25
	Subtotal	50
Prior Attendance	6-12 Months (1+ event)	10
Total Events Potential Points: 60		

Other		Avail. Points
Additional Information	Alum	5
	Spouse is Alum	5
	Parent	5
	0-12 Months (2+ click-throughs)	10
	Active Committee Member	15
Total Other Potential Points: 40		

Score 1: Solicitation Readiness Scale

Indicator Quantifies Relationship with Institution

In Practice: How The Solicitation Readiness Scale is Used

How Does a Gift Officer Use the Score?



One Number, Lots of Information

SRS provides a single indicator of the level of contact and frequency of engagement with a prospect



Getting Closer

400 is a tipping point within a portfolio: this number is a good point to begin considering an ask



First Things First

SRS also serves as a prioritization tool for gift officers, enabling them to better manage their portfolio and craft visit and contact strategies

How Does the Score Change the Management Conversation?

Gift Officer
Quantifiable evidence of work put in to relationships



Manager
Clear indicators of relationship progress to start looking forward

SRS Enables Management to Ask Direct Questions of Gift Officers

- Who are your strongest prospects right now?
- What are you doing to move your prospects forward (closer to solicitation)?
- Are you applying quality contacts (dean visits, in-person visits) to quality prospects?
- When will this prospect reach the formal ask stage?

Score 2: Potential Ask Range

Lots of Data In, One Score Out

PAR Overview

Up to eleven data points per contact included...

...algorithm applied...

...PAR score provides ask range.

Internal

- Giving total

Purchased

- Gift Range (Target Analytics)
- Major Gift Likelihood (Target Analytics)
- Income360 (Target Analytics)
- Echelon Segment (Target Analytics)
- PRIZM Category (Nielsen Claritas)
- PRIZM Real Estate (Nielsen Claritas)
- PRIZM Income (Nielsen Claritas)
- 1-Year All-Gift Capacity (GG&A)
- 1-Year Exact Gift Capacity (GG&A)
- 1-Year Gift Capacity (WealthEngine)



- Sources weighted differently according to reliability
- Data availability factors into a second figure, the Reliability Score

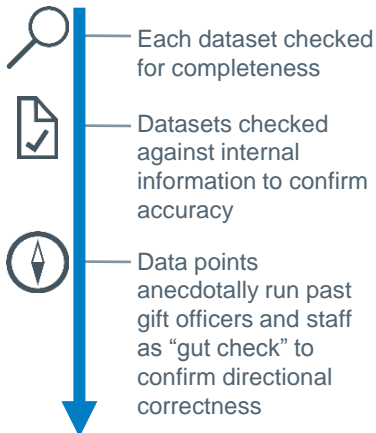
Potential Ask Range
1-1,000 points

- Each hundred-point PAR range corresponds to a dollar range
- Provides one-year ask range
- Ongoing testing, anecdotal and statistical, to improve understanding and accuracy of scores

Score 2: Potential Ask Range

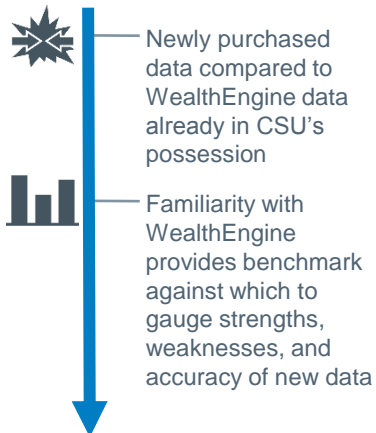
Determining the Recipe: Examine Data Sets Individually, Then Experiment

Does it feel right?



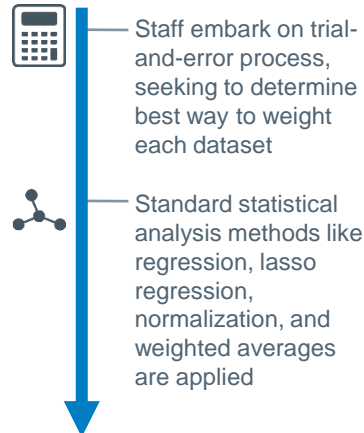
Understanding of each set's accuracy, enabling staff to begin determining each set's weight

How does it compare to a trusted reference point?



Awareness of how datasets relate to one another and how datasets meet others' shortcomings

How do these all fit together?



Various "test" scores created until arrival at final score and setting of 1,000 point scale

Score 2: Potential Ask Range

The Final Result

One-Year Potential Ask Range and Reliability Score

Component Weights Reflect Accuracy of Individual Datasets

Score Component <i>(P) denotes Purchased</i>	Avail. Points
Gift Range <i>(P)</i>	100
Major Gift Likelihood <i>(P)</i>	100
Household Income <i>(P)</i>	100
Echelon Segment <i>(P)</i>	100
Demographic Category <i>(P)</i>	100
Income <i>(P)</i>	50
Real Estate <i>(P)</i>	50
One-Year All Gift Capacity <i>(P)</i>	100
One-Year Exact Gift Capacity <i>(P)</i>	100
One-Year Gift Capacity <i>(P)</i>	100
Campaign Giving Total	100

Score Tells Gift Officer Where to Target Ask

Points	Ask Range	Points	Ask Range
1-199	Less than \$5,000	600-699	\$100,000 - \$250,000
200-299	\$5,000 - \$10,000	700-799	\$250,000 - \$500,000
300-399	\$10,000 - \$25,000	800-899	\$500,000 - \$1 M
400-499	\$25,000 - \$50,000	900-949	\$1 M - \$5 M
500-599	\$50,000 - \$100,000	950-1,000	\$5 M +

Key Attributes of PAR Score

- Single indicator makes sense of eleven disparate data sources
- Accuracy of source data “built in” to final score via total points available for each source
- Gift officers need only look at one score to determine range, enabling better portfolio management, prioritization, and forecasting

Reliability Score Adds Context

- Sits alongside PAR score
- Discounts total potential points based on completeness of available data
- Informs a gift officer of how heavily to rely on PAR figure

Available Sources	Total Possible Points
1	50 – 100
2	101 – 200
3	201 – 300
4	301 – 400
5	401 – 500
6	501 – 600
7	601 – 700
8	701 – 800
9	801 – 900
10	901 – 1,000



Knowing Our Own Systems

“The PAR Reliability score is simply an indicator of how many data points were available to derive the PAR score. In the broadest sense, the PAR Reliability score is a measure of how accurate the PAR score is until further research, by either the prospect research staff or a development officer, is done. Currently, we feel that the PAR score is around 80% of the time right on target. When the PAR score is off it is often only off by one level, and usually lower than reality.”

*Colorado State University
Statement on PAR Score*

Data-Driven Solicitations

Closing the Loop: Embedding Scores into Everyday Operations Yields Results

Gift Officer Education Leads to Data-Driven Conversations

Scores Still New, But Showing Promise



Training Materials

Prospect Research provides frontline staff with materials explaining the source data, score calculations, and how to use the scores



One-on-One Training

Prospect Research staff work closely with all development officers on using the scores, emphasizing:

- Validity
- Contextualizing scores based on interactions with prospect



Changing the Conversation

“The scores have proven to be very useful in allowing far more and more detailed discussions about the progress with particular prospects and groups of prospects without having to just rely on memories of the development officers.”

*Colorado State University
Statement on PAR Score*

Data-Driven Solicitations

Manage to Data and Systems to Maintain Integrity of Reporting and Analyses

Intranet access puts information in front of officers every day

Make It Easy for Them
System Characteristics Drive Adoption

PAR and SRS front and center for every prospect, updated daily

Development Pipeline - Prospect Portfolio

Drilldown Settings

All - Face Value
Assigned -- *John A. Cooney, CSU*

Overall Statistics for *John A. Cooney, CSU*

- 63 Total Prospects
- 6 Added in Last 365 Days
- 9 Dropped in Last 365 Days

Actions	Stage	Prospect Name	Expectancy	PAR	SRS	Days Since Last Contact	Next Task	Proposal Date	Proposal Amount Assigned
[Icons]	Explore	<i>John A. Cooney & The Board of CSU Officers</i>	(secondary)	\$100K-\$250K	295 ↓	137			
[Icons]	Explore	<i>John A. Cooney</i>		\$100,000	100	53			
[Icons]	Stewardship	<i>John A. Cooney</i>	(secondary)	\$25K-\$50K	245 ↓	33			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$25K-\$50K	220	20			
[Icons]	Solicitation	<i>John A. Cooney</i>	(secondary)	\$10K-\$15K	85	683			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$25K-\$50K	210 ↓	113	12/3/12	\$200,000	
[Icons]	Substantive	<i>John A. Cooney</i>	(secondary)	\$50K-\$100K	235	203			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$15K-\$25K	80 ↓	258	12/1/12	\$5,000	
[Icons]	Explore	<i>John A. Cooney</i>		\$0	-2,500	350			
[Icons]	Solicitation	<i>John A. Cooney</i>	(secondary)	\$15K-\$25K	400 ↓	17			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$1M-\$5M	R/C	350			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$100K-\$250K	350 ↓	165			
[Icons]	Explore	<i>John A. Cooney</i>		\$1,000	\$15K-\$25K	35			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$15K-\$25K	410 ↓	-132			
[Icons]	Explore	<i>John A. Cooney</i>		\$10,000	\$25K-\$50K	42			
[Icons]	Explore	<i>John A. Cooney</i>		\$1	\$25K-\$50K	25			
[Icons]	Explore	<i>John A. Cooney</i>		\$10,000	\$25K-\$50K	25			
[Icons]	Explore	<i>John A. Cooney</i>	(secondary)	\$25K-\$50K	275 ↓	3			
[Icons]	Explore	<i>John A. Cooney</i>		\$25,000	\$15K-\$25K	155 ↓			

Graphical indicators indicate recent changes to relationship reflected in SRS

Also optimized for viewing on mobile devices (iPhone, iPad, and Android)

- **User-friendly.** Can users easily and quickly figure out where to go to get the information they need?
- **Visually appealing.** Are graphs, charts, and reports easy to read and understand?
- **Mobile accessible.** Can staff, especially gift officers, enter and pull information on the go (like entering a contact report immediately after a visit)?
- **Inescapable.** Do users see the interface regularly (e.g., as an Intranet homepage or automated email push)?



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eab.com

2445 M Street NW | Washington DC 20037
P 202.266.6400 | F 202.266.5700