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Fundraising Systems & Donor Database Services

# Hospital Foundation Client

Sample WealthPLUS Presentation

## Screening Summary

2098 Records Submitted

2066 Records Screened

68% Qualify as Major Donor Prospects (P2G rating)

5 Year Giving Value of File = \$177MM (\$35MM per Year)

# Screening Definitions

## Gift Capacity Ratings

These are statistically derived, modeled scores. They do not utilize client-supplied data.

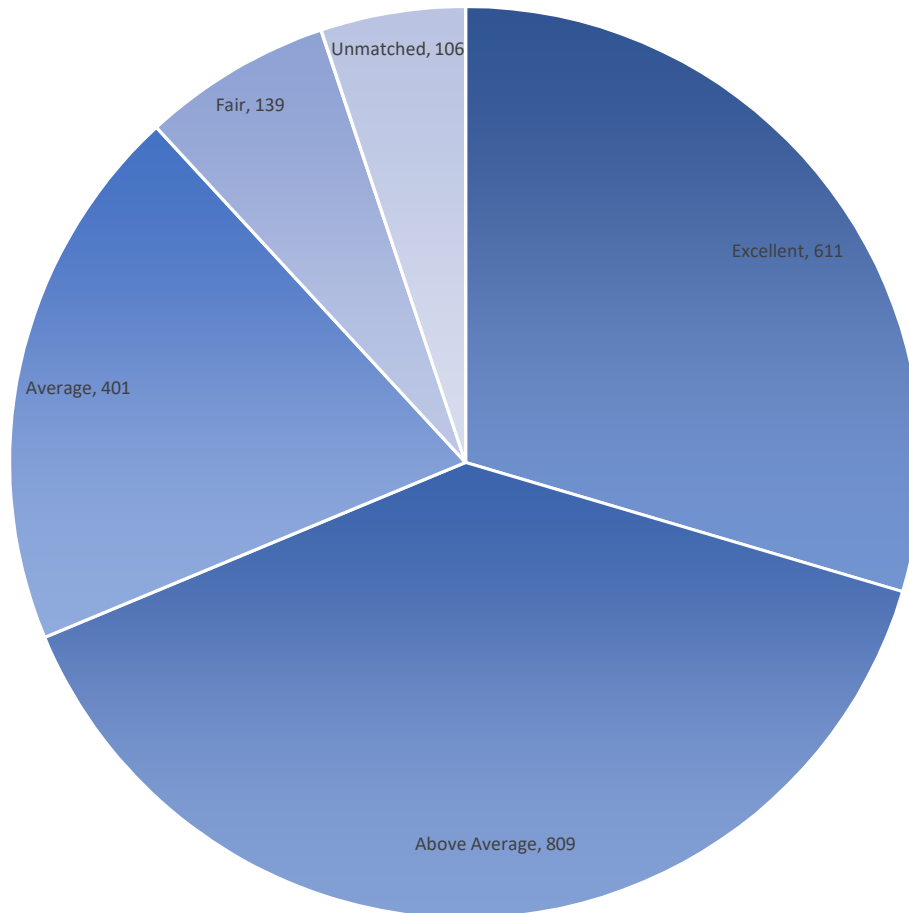
- Gift Capacity – Total giving to all organizations combined over a 5-year period
- Estimated Annual Giving Capacity—Total giving to all organizations in a single year

## Propensity to Give (P2G)

Combines wealth data and predictive values of specific data source matches as a way of identifying top prospects.

- 1 = Minimum capacity of \$50k plus strong match with other Major Donor indicators
- 2 = Minimum capacity of \$50k
- 3 = Low capacity, strong match
- 4 = Low capacity, basic match only
- 5 = No match with WealthEngine Data

## Propensity to Give (P2G)



## Analytics Definitions

### Active Foundation Donors (869)

Individuals who have given a non-Event Gift of any amount since 2014

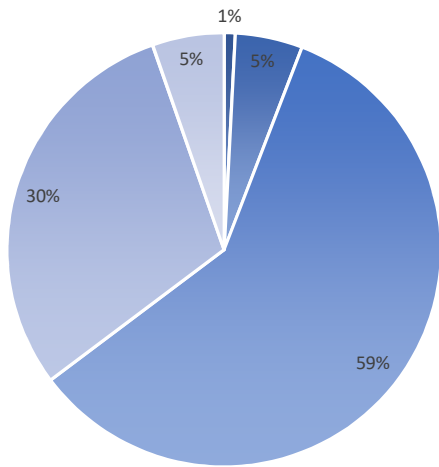
### Suspects and Lapsed Donors (1,197)

Donors who have given only Event-related gifts since 2014

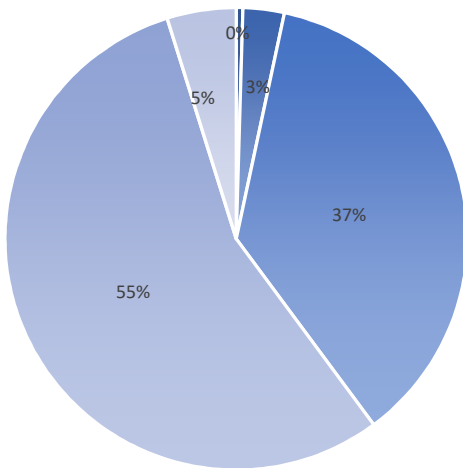
Donors who have not given since 2014

Individuals with no giving on record

Suspect

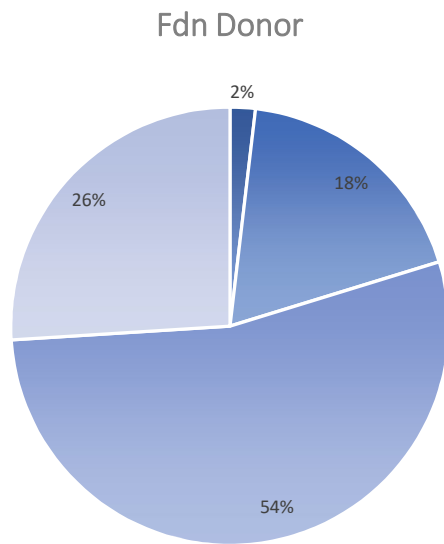
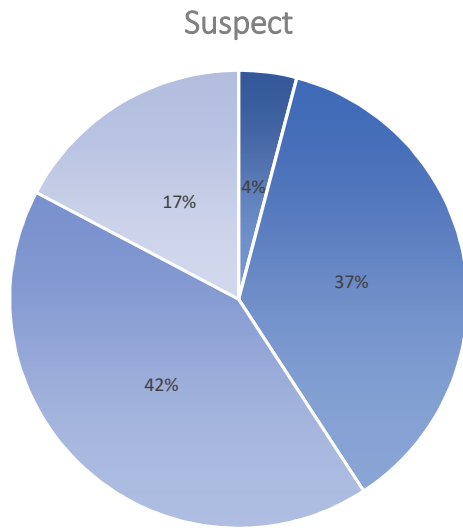


Fdn Donor



## Net Assets

	Suspect	Fdn Donor
\$50MM and more	10	4
\$10MM-\$49MM	60	25
\$1MM-9MM	705	317
Under \$1MM	358	480
Unable to rate	64	42

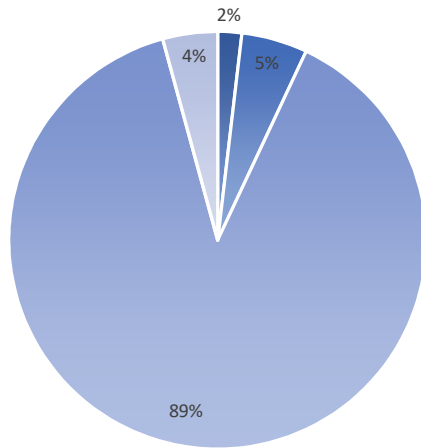


## Gift Capacity

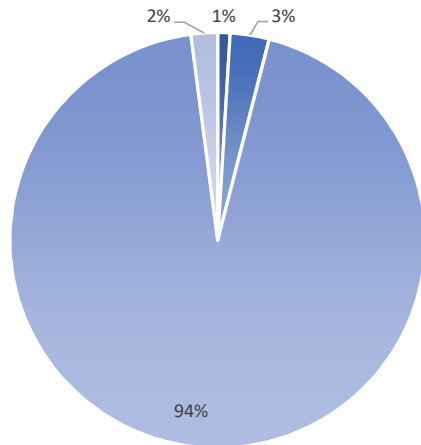
Total Giving Capacity to all organizations over 5 years

	Suspect	Fdn Donor
Leadership Capacity (\$500K and more)	55	21
High Capacity (\$100k-499k)	493	205
Moderate Capacity (\$50k-99k)	563	600
Low Capacity (Under \$50k)	232	290

Suspect



Fdn Donor



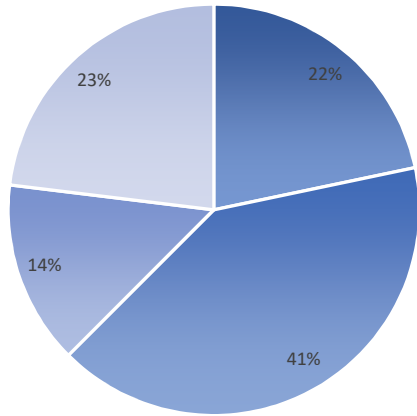
## Estimated Annual Giving

Total Giving Capacity to all organizations in one year

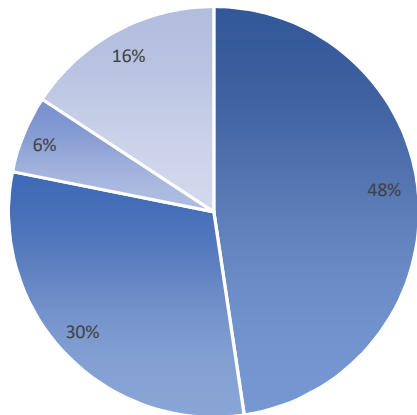
	Suspect	Fdn Donor
Leadership (\$50k or more)	21	8
Major II (\$10k-44k)	58	25
Major I (\$1k-9k)	1,006	777
Regular (under \$1k)	48	17



Suspect



Fdn Donor



Age

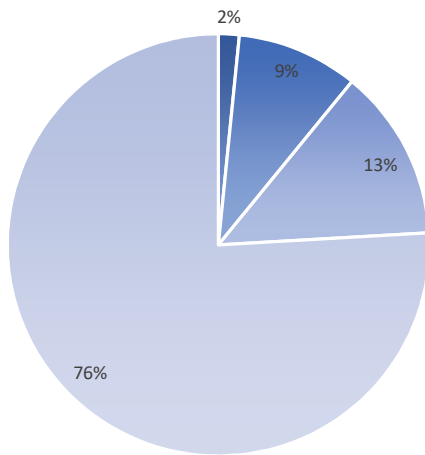
	Suspect	Fdn Donor
70 Years and Over	260	414
50-69 Years	488	265
Under 50 Years	173	53
Unknown	276	137

## Screening Definitions

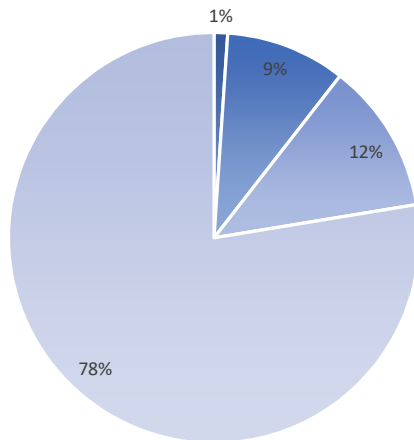
### Planned Giving (Bequests, Annuities, and Estates)

Calculated likelihood based on Age and Net Assets

Suspect



Fdn Donor



## Planned Giving

	Suspect	Fdn Donor
Trust	25	12
Annuity	147	106
Bequest	208	133
None	1197	869

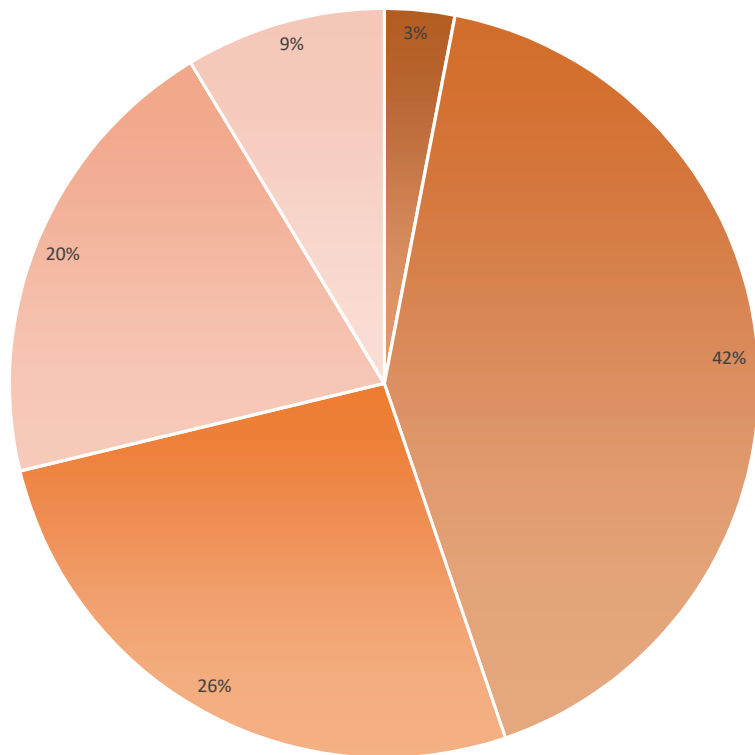
## Patient Screening Summary

925 Records from 2015-2016 Patient Screening Files

45% Qualify as Major Donor Prospects (P2G rating)

52 Records have Deceased Indicator (these records are included in summary analysis)

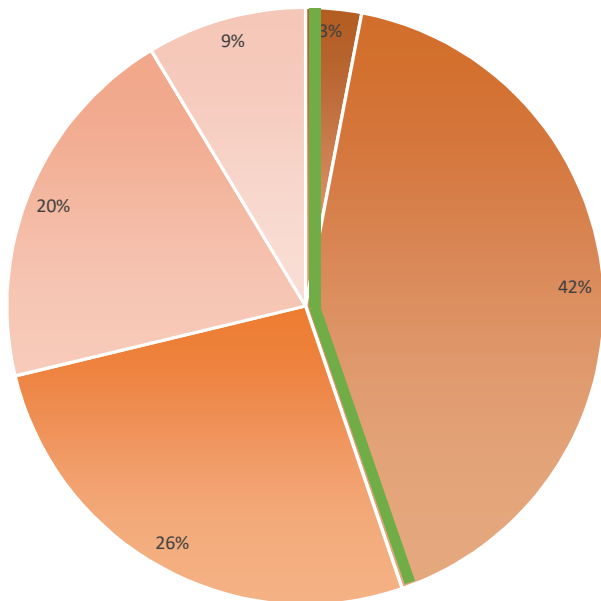
## Propensity to Give



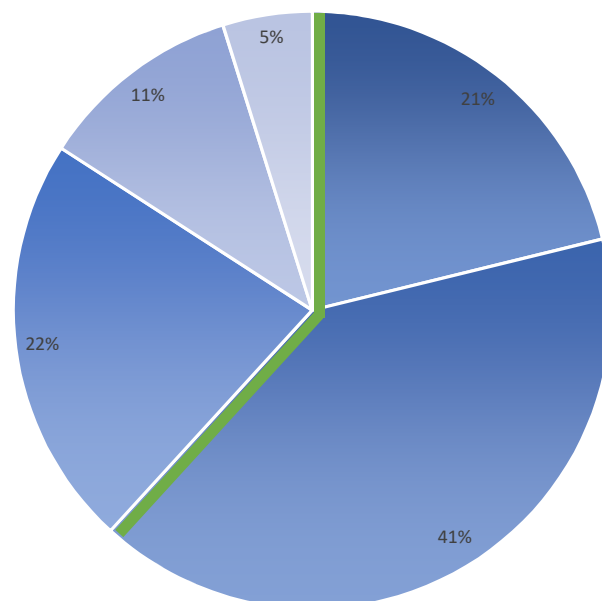
Excellent	28
Above Average	386
Average	245
Fair	186
Unmatched	80

# Propensity to Give

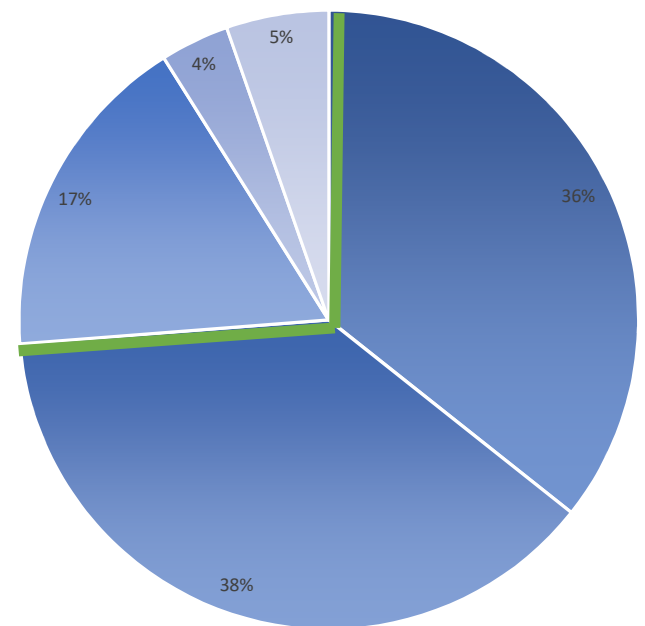
## Patient



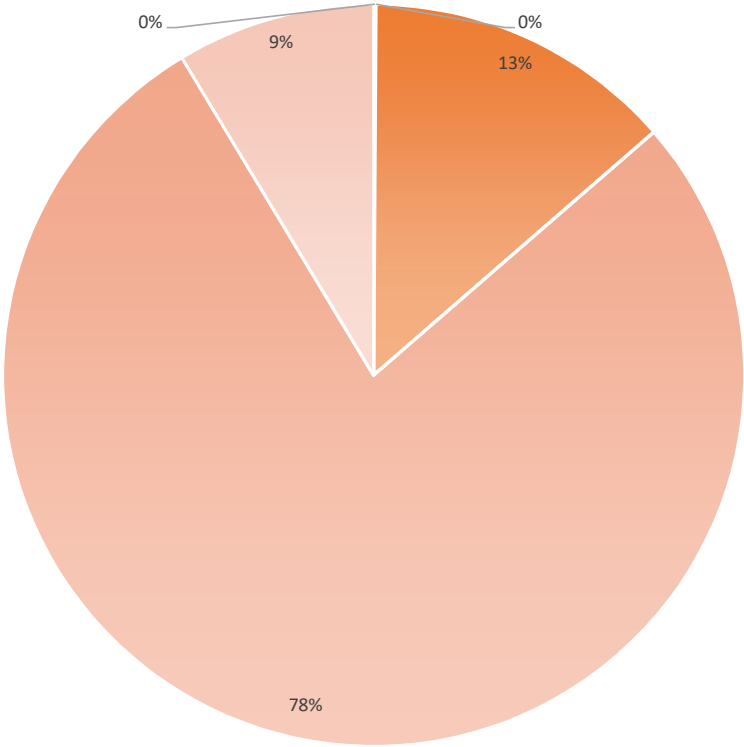
## Fdn Donor



## Suspect

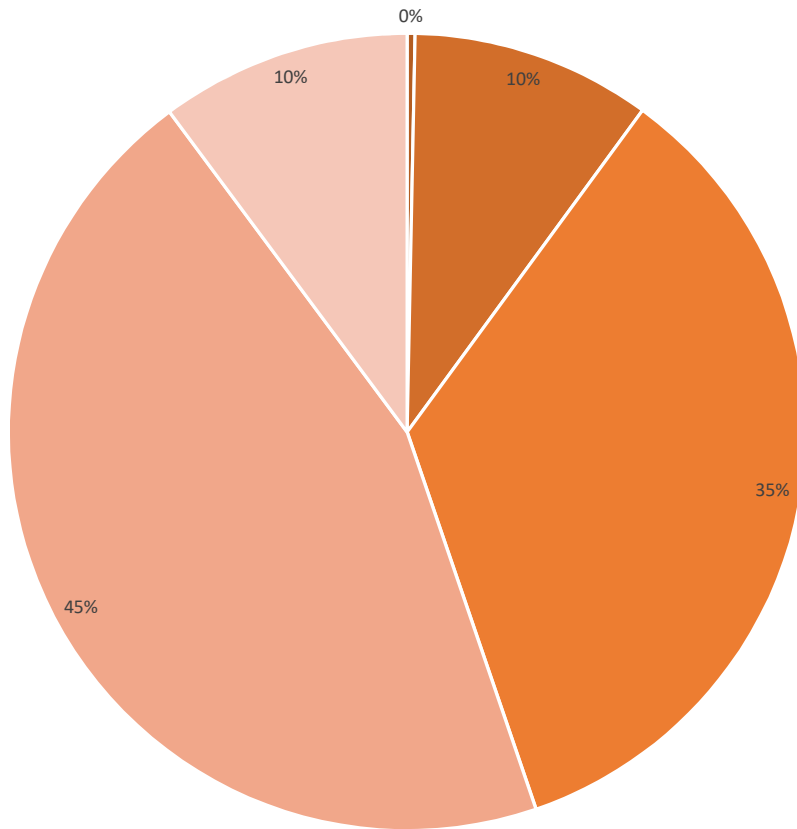


# Net Assets



Over \$50MM	1
\$10MM-\$50MM	0
\$1MM-\$9MM	125
Under \$1MM	719
Unable to rate	80

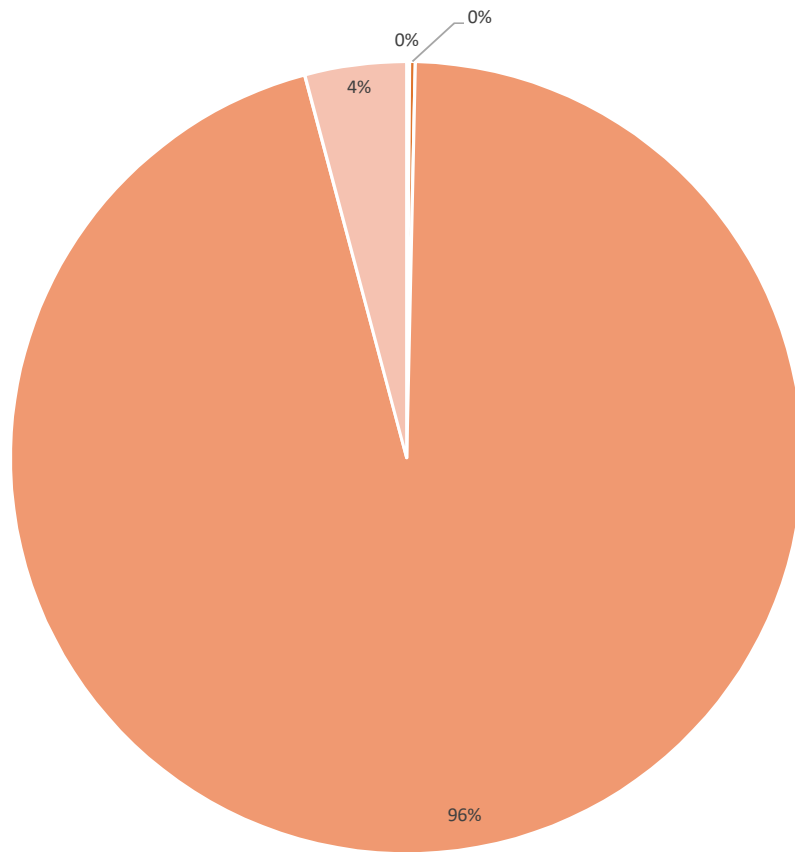
## Gift Capacity



Leadership Capacity (\$500k and over)	3
High Capacity (\$100k-\$499k)	90
Moderate Capacity (\$50k-99k)	321
Low Capacity (under \$50k)	417
Unable to rate	94

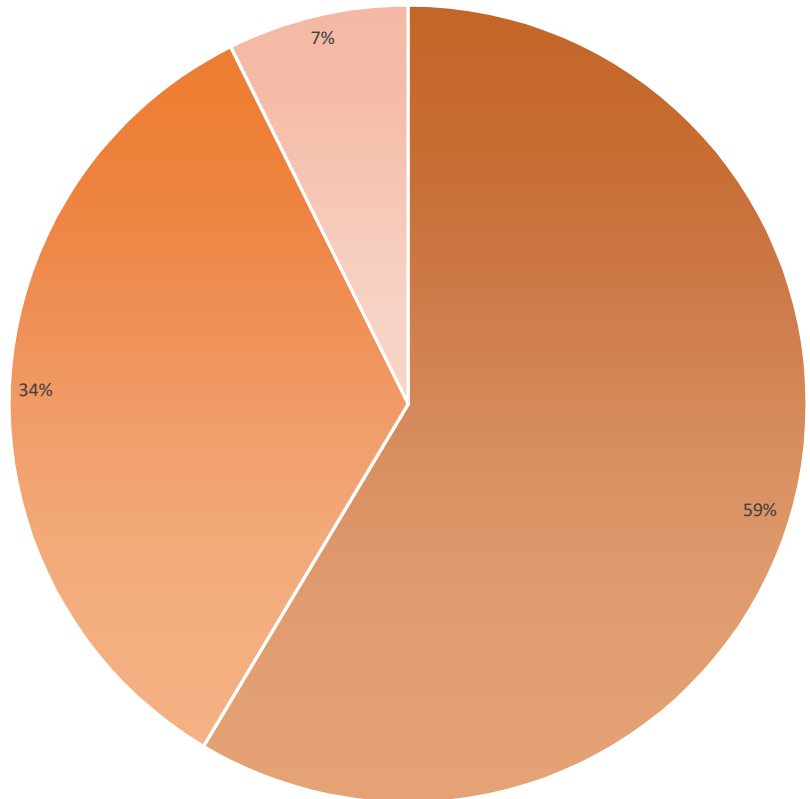


## Estimated Annual Gift Capacity



Leadership (\$50k or more)	1
Major II (\$10k-44k)	2
Major I (\$1k-9k)	807
Regular (under \$1k)	35

# Age



Over 70	495
50-69 Years	288
Under 50	62

## Planned Giving

Trust	1
Annuity	67
Bequest	78

## File Segmentation Based on WealthScreening Results

### High Capacity Donors (80)

Active donors with High Capacity + Leadership Donor Indicators

### High Capacity Prospects (125)

Suspects and lapsed donors with High Capacity + Leadership Donor Indicators

### Major Donors (147)

Current donors with demonstrated \$1,000+ giving without strong Leadership Donor Indicators

### Moderate Capacity Regular Donors & Prospects (457)

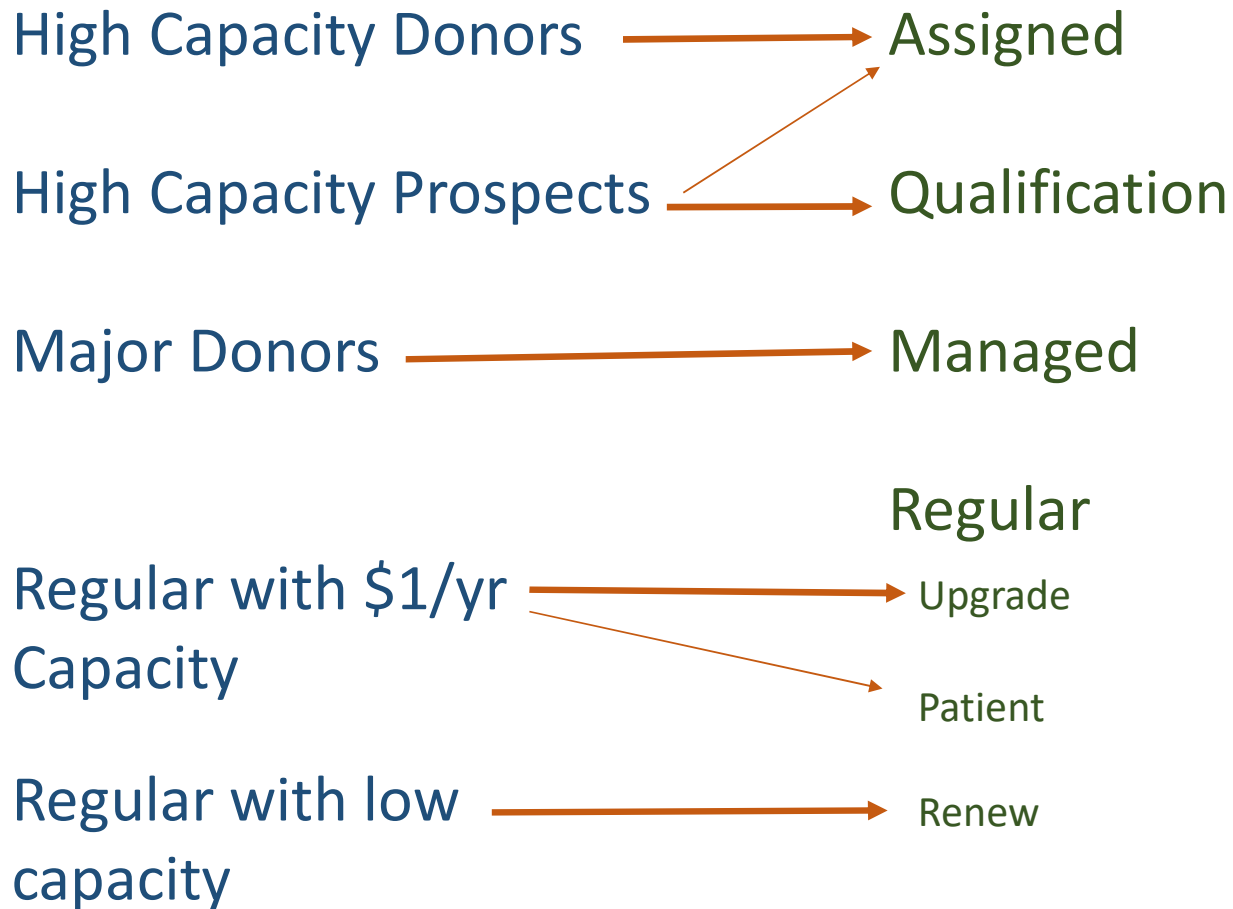
Current, regular-level donors and prospects with suspected capacity to give \$1k-5k annually

### Regular Donors (1,257)

Prospects and donors giving under \$1k who have Low Capacity or low inclination to give \$1k+

## High Capacity Prospect List

## Segmented Communication Tracks



## Segmented Communication Tracks

...Continued