Targeting Your Best Prospects

A COLLABORATIVE STORY

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AGENDA

WHY BLACKBAUD

TARGET ANALYTICS &
MEREDITH COLLEGE

Q&A

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Q&A

Build a thriving institution with Blackbaud, the world's leading cloud software company powering social good.

We support the entire social good community.

Our vision is to power an Ecosystem of Good® that builds a better world.

We make it simple with one accountable partner

Software

We build, integrate, implement, and support solutions that help make your institution's vision a reality.

Expertise

With more than three decades of experience, we are undisputed industry experts on technology for higher education.

Services

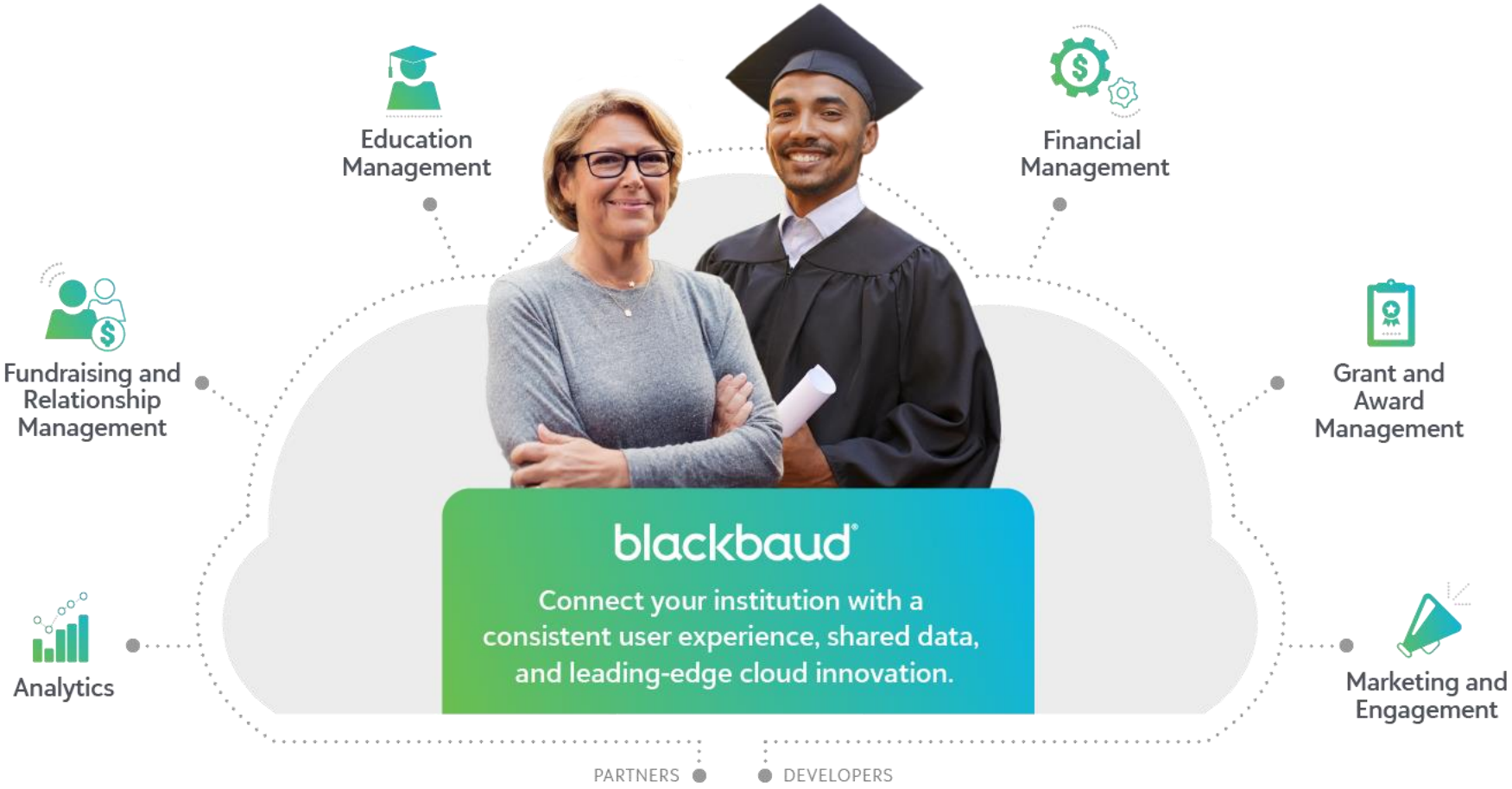
We offer dedicated customer support and training, along with strategic and managed services tailored to higher education outcomes.

Data Intelligence

Using exclusive data, analytics, and expertise, we deliver unparalleled insight and intelligence to the institutions we serve.

The Cloud Solution for Higher Education

Purpose-built to drive digital transformation and impact across your institution. Flexible and scalable to work the way you want.



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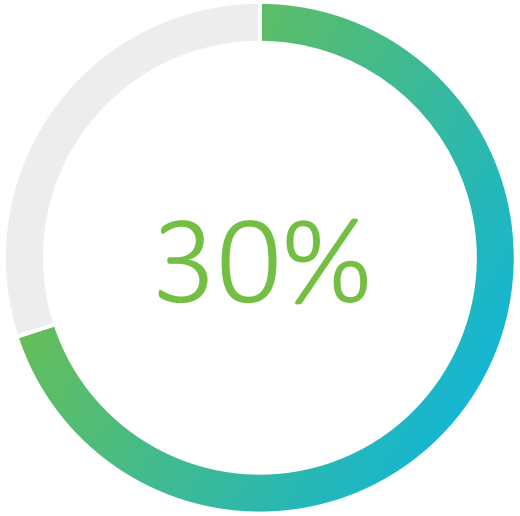
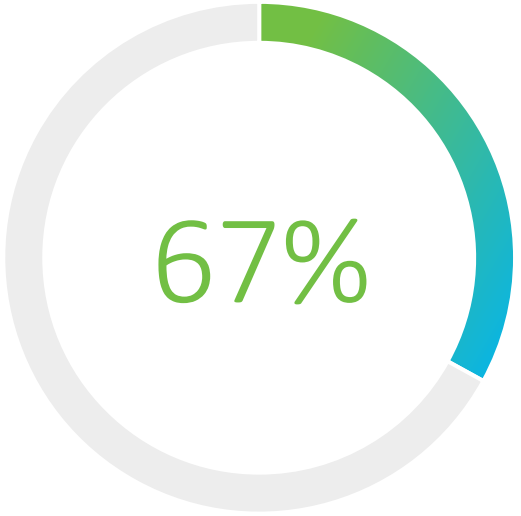
Q&A

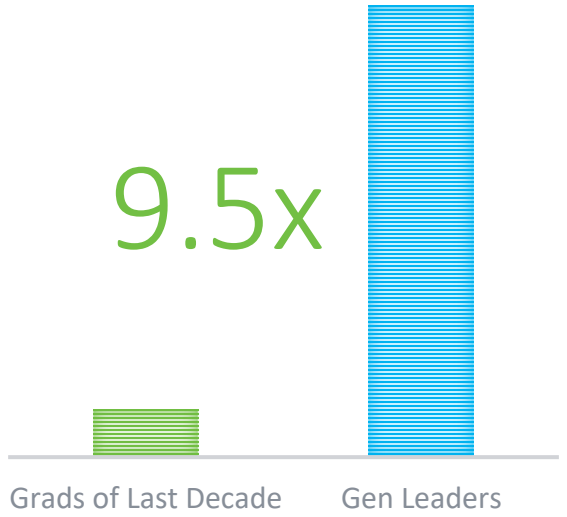
Research across hundreds of colleges and universities tells us the fundraiser's job is tough and getting tougher



Decline in participation in middle-aged donors in the last 20 years



Of the best prospects are not assigned or are not on your radar



Around 10 years post-graduation, Generational Leaders give gifts 9.5 times greater than average.

Stats from the 2021 Higher Education Community Report for Advancement

Streamline Portfolios

When the portfolio contains **less than 120 prospects**,
the average commitment per assigned household increases...

↑ 57%

for leadership annual gifts

↑ 35%

for major gifts

↑ 67%

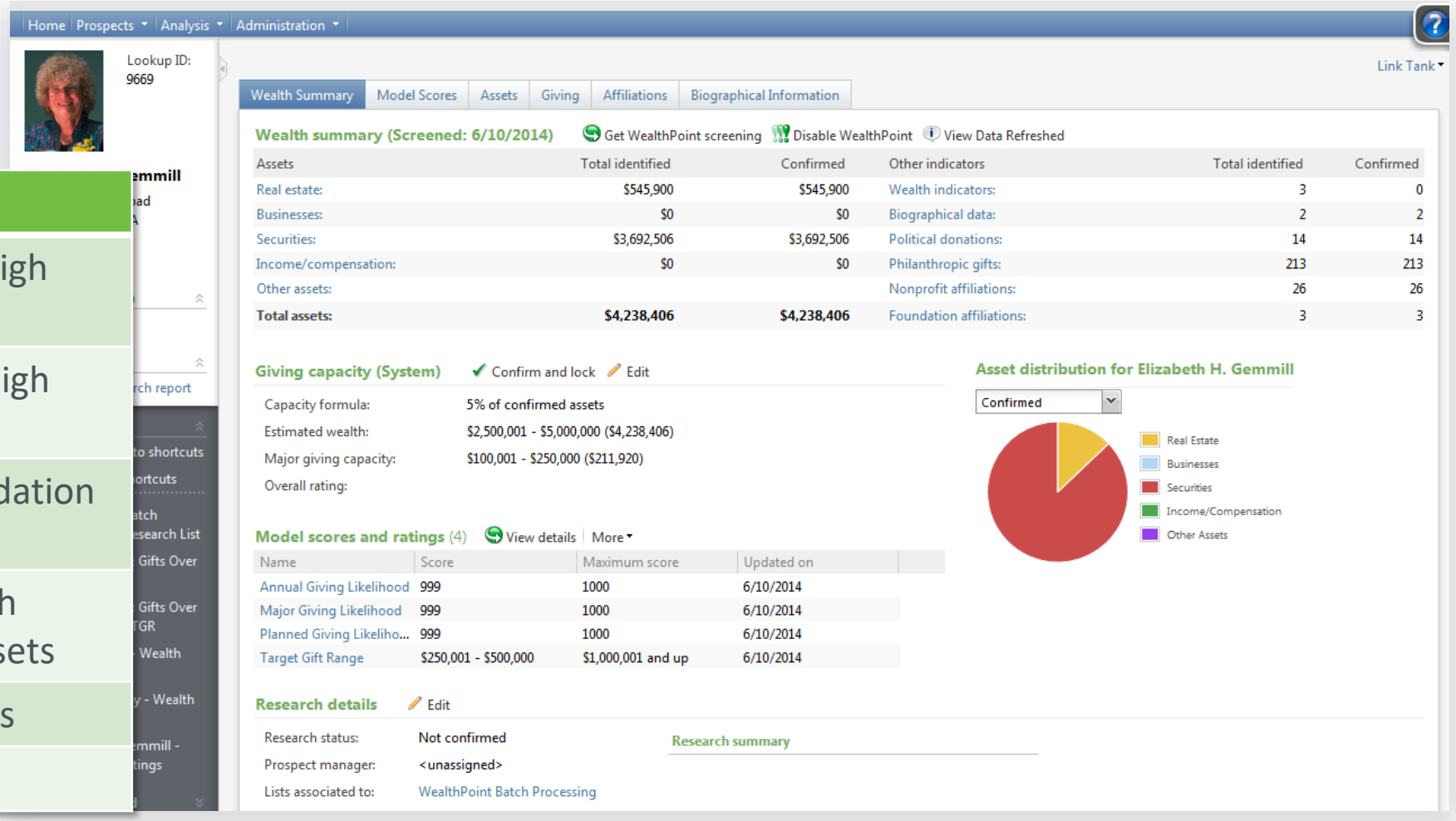
in planned gifts

Stats from the 2021 Higher Education Community Report for Advancement

Blackbaud Target Analytics: ResearchPoint

Prospect Research Software with Wealth Point Data

Priority	Score return
1	MG Capacity + High Philanthropy
2	Any Capacity + High Philanthropy
3	Confirmed Foundation Affiliations
4	MG Capacity with Unconfirmed Assets
5	Wealth Indicators
6	MG Capacity



Who to screen?

Entire Database

Not recommended

Smaller batches

Screen batches up to 4x per year

Stay focused

Who to screen?

Parents

Screen incoming traditional parents every year.

Alumni

All alumni should have a wealth screening result from within the past 5 years.

Current Year	Screen class years ending with
2022	3 & 8
2023	4 & 9
2024	5 & 0
2025	6 & 1
2026	7 & 2

Donors

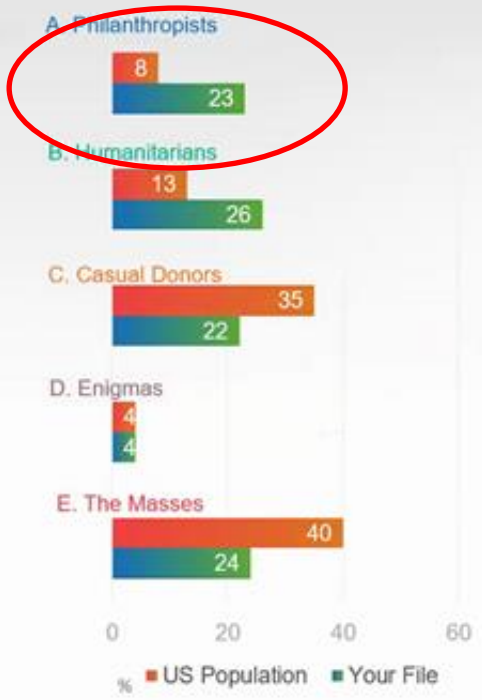
Current donors should have a wealth screening from within the past 3-5 years.

Why an analytics project?

- It was time
  - Last analyzed our database in 2010
- End of the Beyond Strong Campaign
  - What's next?
- Building our prospect pipeline
  - Strategic, timed asks
- Intrigued by the results of a preliminary analysis of our database

Affluence Scorecard

Prospect and Donor Profile Screening



Average Identified Wealth

Segment	Discretionary Spend	Net Worth	Income	Investments
Average	$14,235	$881,461	$108,170	$645,785

?!?!

Noteworthy Individuals

	# Constituents Identified	Sample of Individuals Not Giving	Sample of Individuals Giving Low	Sample of Individuals Giving High
Annual Income > $250,000	2,442 13.0% have donated			
Total Net Worth > $1,000,000	10,658 12.5% have donated			
Total Discretionary Income > $50,000	540 15.2% have donated			
Total Investments > $1,000,000	7,131 12.9% have donated			

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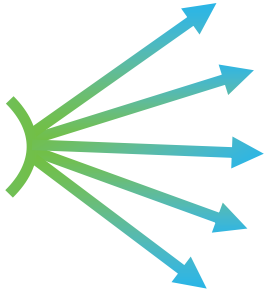
Blackbaud Target Analytics: Affluence Insights

Pulling accurate, actionable wealth attribute intelligence from across the US population to organize prospects into precise donor groups and segments.

4 Wealth Attributes

- Annual Income
- Net Worth
- Investments
- Discretionary Spending



5 Donor Groups | 13 Segments

- A. Philanthropists
- B. Humanitarians
- C. Casual Donors
- D. Affluent Enigmas
- E. Non-Affluent Enigmas

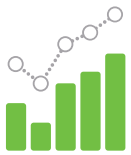
Blackbaud Target Analytics: ProspectPoint Models

- ✓ Major Giving
- ✓ Annual Giving
- ✓ Planned Giving
- ✓ Principal Giving
- ✓ Target Gift Range

Identify the best prospects for each fundraising program

Minimize time and resources wasted researching suboptimal prospects

Leverage guidance from strategic consultants with decades of knowledge and experience



Maximize your return on fundraising investment

Modeling scores can be added to any Blackbaud or third-party database

Identify upgrades

For those with high Major Gift Likelihood, use Target Gift Ranges against largest annual gift total from the last 5 years to identify areas of upgrade potential.

Largest annual gift total (last 5 years)	TGR 6: $1,001 - $2,500	TGR 7: $2,501 - $5,000	TGR 8: $5,001 - $10,000	TGR 9: $10,001 - $25,000	TGR 10: $25,001 - $50,000	TGR 11: $50,001 - $100,000	TGR 12: $100,001 +
$100,001 +							**17**
$50,001 - $100,000						**12**	1
$25,001 - $50,000					**20**	4	1
$10,001 - $25,000				**31**	10	3	0
$5,001 - $10,000			**43**	23	9	4	0
$2,501 - $5,000		**57**	34	17	8	1	0
$1,001 - $2,500	**127**	169	38	59	5	0	2
$501 - $1,000	248	64	50	18	10	0	0
$251 - $500	160	158	40	29	0	1	0
$101 - $250	445	74	59	12	1	0	1
$51 - $100	98	54	12	5	1	0	1
$1 - $50	76	16	4	1	0	0	0
$0	24	10	5	2	1	0	0
Total	1,178	603	285	197	65	25	23

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Thank You!

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