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# Targeting Your Best Prospects

A COLLABORATIVE STORY

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# AGENDA

WHY BLACKBAUD

TARGET ANALYTICS &  
MEREDITH COLLEGE

Q&A

A photograph of a modern building interior, likely a university hallway or atrium. The space is bright and open, with large windows on the upper level and a glass-walled room on the right. People are seen walking through the space. The image is overlaid with a semi-transparent green filter. The text 'AGENDA' is in the top left, 'WHY BLACKBAUD' is in the center left, 'TARGET ANALYTICS & MEREDITH COLLEGE' is below it, and 'Q&A' is further down. The 'blackbaud' logo is on the right wall, and the 'blackbaud' logo is in the bottom left corner of the slide.

AGENDA

## WHY BLACKBAUD

TARGET ANALYTICS &  
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Q&A

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Build a thriving institution  
with Blackbaud, the  
world's leading cloud  
software company  
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We support the **entire  
social good community.**

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



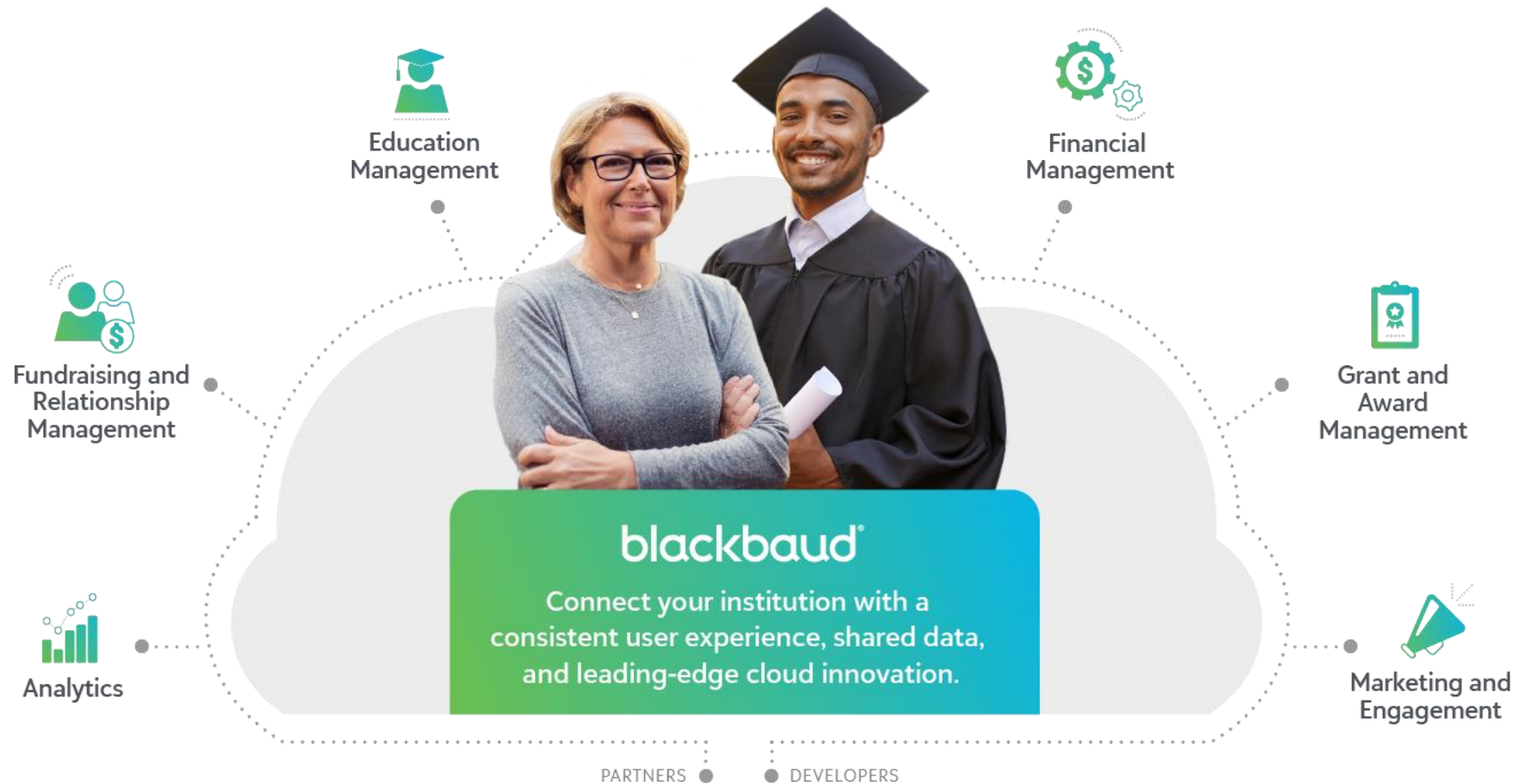
We make it  
simple with **one**  
**accountable**  
**partner**

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# 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.







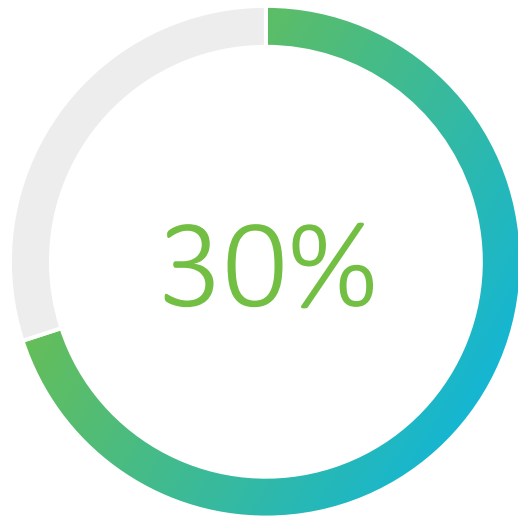
AGENDA

WHY BLACKBAUD

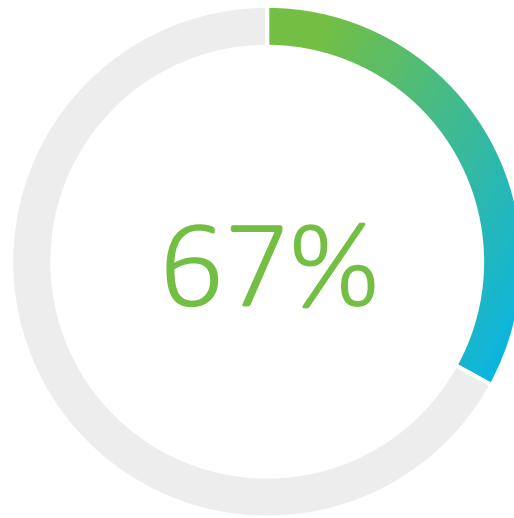
**TARGET ANALYTICS &  
MEREDITH COLLEGE**

Q&A

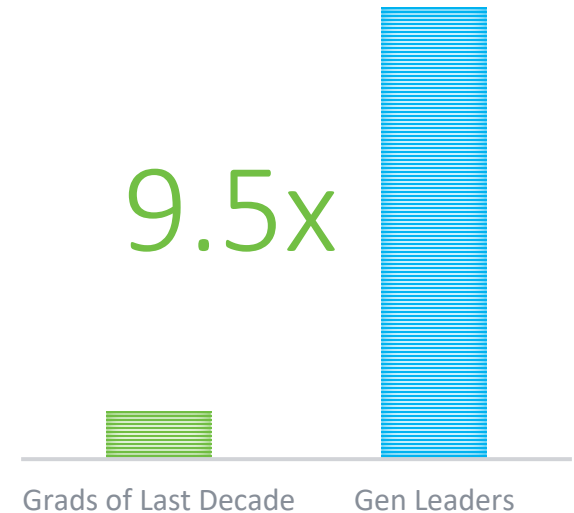
# Research across hundreds of colleges and universities tells us the fundraiser's job is tough and getting tougher



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

HomeProspectsAnalysisAdministration



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Wealth SummaryModel ScoresAssetsGivingAffiliationsBiographical Information

Wealth summary (Screened: 6/10/2014)

Get WealthPoint screeningDisable WealthPointView Data Refreshed

Assets	Total identified	Confirmed	Other indicators	Total identified	Confirmed
Real estate:	\$545,900	\$545,900	Wealth indicators:	3	0
Businesses:	\$0	\$0	Biographical data:	2	2
Securities:	\$3,692,506	\$3,692,506	Political donations:	14	14
Income/compensation:	\$0	\$0	Philanthropic gifts:	213	213
Other assets:			Nonprofit affiliations:	26	26
Total assets:	\$4,238,406	\$4,238,406	Foundation affiliations:	3	3

Giving capacity (System)

Confirm and lockEdit

Capacity formula:5% of confirmed assets

Estimated wealth:\$2,500,001 - \$5,000,000 (\$4,238,406)

Major giving capacity:\$100,001 - \$250,000 (\$211,920)

Overall rating:

Model scores and ratings (4)

View detailsMore

Name	Score	Maximum score	Updated on
Annual Giving Likelihood	999	1000	6/10/2014
Major Giving Likelihood	999	1000	6/10/2014
Planned Giving Likeliho...	999	1000	6/10/2014
Target Gift Range	\$250,001 - \$500,000	\$1,000,001 and up	6/10/2014

Research details

Edit

Research status:Not confirmed


Prospect manager:<unassigned>

Lists associated to:WealthPoint Batch Processing

Research summary

Asset distribution for Elizabeth H. Gemmill

Confirmed



Real EstateBusinessesSecuritiesIncome/CompensationOther Assets



# 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?

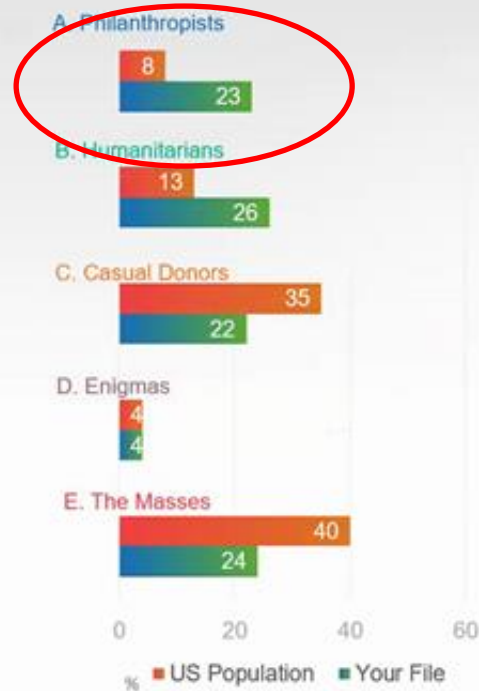
- It was time
  - Last analyzed our database in 2010
- End of the Beyond Strong Campaign
  - What's next?
- Building our prospect pipeline
  - Strategic, timed asks
- Intrigued by the results of a preliminary analysis of our database

# Affluence Scorecard

Prospect and Donor Profile Screening



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## 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



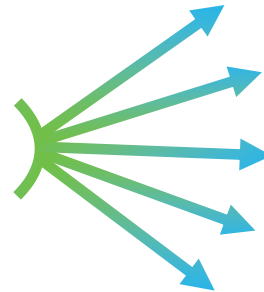
C. Casual Donors



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



AGENDA

WHY BLACKBAUD

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MEREDITH COLLEGE

**Q&A**



# Thank You!

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