Spring 2013

# GG+A Quarterly Review

GG+A
Grenzebach Glier and Associates

*Philanthropic News & Analysis*

## The Brave New World of Advancement Services

Not-for-profit organizations of all sizes across all sectors have access to far greater amounts of information from more diverse sources than ever before. This unprecedented access to data is changing how institutions operate, how decisions are made, and how constituents are engaged.

This avalanche of data comes at a time when advancement professionals must produce more detailed plans and budgets, respond to more complex federal and local rules and regulations related to charitable giving, and keep pace with evolving technologies to collect and analyze data. Increasingly, senior managers and board members are interested in performance metrics and benchmarking to assess the effectiveness of fundraising operations. All of these factors have contributed to an expanding role for advancement services.

In this issue, senior advancement services professionals from educational, cultural, healthcare, and voluntary organizations discuss how their function has moved out of the back office to the forefront of the advancement operation. In addition, initiatives spearheaded by administrative services operations are highlighted throughout the newsletter.

### A Place at the Table

When Walt Dryfoos, associate vice president of advancement services for the **University of Washington**, was a student working in development at the **University of California, Berkeley**, "address updates were made by hand on standard forms and carried to the keypunch operators. The stacks of punch cards then were mailed to

*continued on page 2*

## In this Issue



## Data is Power

### Metrics Drive Development Decision-Making

Interviewees are fully committed to ensuring that advancement services provides front-line fundraisers and chief development officers with key metrics that can help them make more informed solicitations and achieve fundraising goals.

Advancement services shops are using both traditional systems and cloud-based software solutions to generate a variety of weekly, monthly, and annual reports to guide fundraising activity. "**World Wildlife Fund** uses a standard statistical analysis program, and we architect it to meet our needs," says John Schwass, senior director of fundraising operations and strategic analysis, who draws extensively on early-career experience in the telecommunications industry with databases and data warehousing. Schwass produces automated e-mail reports for overall fundraising as well as specific programmatic appeals. A web-based portal allows

*continued on page 10*

## The Brave New World of Advancement Services

*continued from page 1*

a central office in Fresno, which housed the mainframe computer for nine campuses."

Over the course of his 33-year career in advancement services, Dryfoos has supported three major comprehensive campaigns and four database conversions at three institutions. When he joined the University of Washington, he advocated for advancement services to report to the vice president of external affairs. "To be most effective, it is important for advancement services to report directly to senior management," says Dryfoos. "Working with executive leadership, I can bring a quantitative and information technology perspective to all conversations."

That perspective is key as advancement services participates more fully in the advancement planning process. "This is an area that can help establish priorities for the development operation," says Katie Edwards, executive director of advancement operations and analytics at **Amherst College**, her alma mater. "We can put power in the hands of front-line fundraisers by giving them the data and the tools to access the information they need."

"The increased functionality of advancement services gives fundraisers more time to focus on the cultivation and solicitation processes," explains Joseph Calger, director of development services for the **University Hospitals of Cleveland**. "All of the heavy lifting before and after solicitation is relegated to advancement services."

Emily Parkhurst, director of development services at the **United States Naval Academy**, has watched advancement services make great strides over the years. She describes the field as similar in nature to "parenthood, where you have a lot of responsibility, but not a lot of control. The more that advancement services has a seat at the table, the more it can contribute to the bottom line through both data analytics and comprehensive reporting."

Interviewees agree that the information technology systems and databases supporting advancement services should be recognized as "core, mission-critical" tools in the same way organizations recognize institution-wide finance and human

### DATA MINING TEXT IN E-MAILS

At World Wildlife Fund, John Schwass is looking for clues that may help explain different response rates to mobile communications. "Increasingly we are working with our research team to develop quantitative measures for key phrases that appear in e-mail messages," he says.

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An international leader in philanthropic management consulting, Grenzebach Glier and Associates (GG+A) has more than 50 years of experience with educational, cultural, medical, and other non-profit institutions. The goal of the *Review* is to provide timely information about issues and events that are relevant to philanthropy.

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resources systems. “As deans and department chairs expect information at their fingertips, we all must be operating from the same system and collaborating more effectively,” says Debbie Anglin, executive director of central development services for the **University of California, San Francisco** Office of Alumni and Development Relations. “We have the data, we know the policies, and we are a resource for the entire development operation.” She notes the shift in thinking that has occurred in recent years, remembering that advancement services professionals at one time were viewed as “techies” seated in the back office with little or no interaction with other advancement staff members or colleagues within the organization.

“Advancement services has matured to the point where we have a role to play in developing the case for support,” says Tom Chaves, assistant vice president for advancement services at **Lehigh University**. As Lehigh moves through the quiet phase of its upcoming $800 million comprehensive campaign, Chaves notes, “To achieve that campaign goal, advancement services will need to work closely with programs and departments across campus.”

As advancement services moves out of the shadows, senior staff members are pursuing partnerships across the institution and taking active roles in creating institutional policies and procedures. Chaves is one of four members of the campaign management group planning Lehigh’s upcoming comprehensive campaign. “I represent the fundraising operation on university-wide data management committees, privacy and systems assurance committees, and compliance, operations, and finance committees,” explains Chaves, who also works regularly with the information technology and legal departments.

At **Villanova University**, Cathleen Parsons-Nikolic, associate vice president of development operations, worked with the controller’s office, research administration, and the general counsel’s office to create a new gift acceptance policy and gift agreement templates. Since joining Villanova, Parsons-Nikolic has spent a good deal of time developing processes “that outline clear expectations to assist both front-line fundraisers and our donors” and has worked closely on risk mitigation with university leaders to ensure that “every aspect of development” meets the university’s ethical and compliance standards.

One of the most important partnerships for the operations team is often with an organization’s central information technology group. At Villanova University, the advancement services area includes technology specialists, who work closely with the university’s core information technology unit. “We are good partners, and from time to time some of our functions overlap,” describes Parsons-Nikolic. Brian Dean, senior director of operational and administrative strategy at the **University of Notre Dame**, heads a team that includes a 12-person information technology staff “that supports university relations, but works closely with the central information technology office and is strategically committed to the direction that office is taking.” ❖

### PATTERNS OF ENGAGEMENT

One of Amherst’s campaign goals is to engage alumni more effectively in the life of the college. The advancement services team is analyzing current levels of involvement, including giving history, volunteering, event attendance, logging into the online community, and voting in trustee elections. “We have found that more than 70 percent of alumni are engaged in at least one activity in any given year, and now we must determine how to translate that involvement to future and sustained engagement,” says Katie Edwards.

# Administrative Services Structures, Skill Sets Vary

Although the size and structure of advancement services operations varies across institutions, at all levels staff members are expanding traditional skill sets and seeking new competencies.


Joseph Calger, director of development services at the University Hospitals of Cleveland, reports that advancement services includes prospect management, donor relations, stewardship research, human resources, budgeting, and operations. In his previous position at the **Cleveland Clinic**, advancement services also included annual giving, gift processing, communications, events, and "any development area that was not front-line fundraising."

Hilary Noon joined the **American Cancer Society** (ACS) as a prospect researcher, and when the organization developed a national customer relationship management (CRM) database, she helped manage the process. "Five years ago, our new chief marketing officer wanted to restructure with a greater focus on constituent experience and behavior," says Noon, vice president of insight and experience, whose new title reflects that shift. "We have merged the two disciplines of market research and analytics to explore and more fully understand what people say, think, and feel about the organization together with the actions they take," adds Noon, who now oversees a 25-member staff.

## Recruiting Outside the Sector

In order to serve fundraising staff and donors well, the field increasingly is attracting individuals from outside the non-profit sector, who bring extensive financial and

### BRAND TRACKING

The American Cancer Society conducts modeling through its brand tracking tool, which measures the perception of the organization. Previously, the society believed that an individual's relationship to cancer was the primary factor in a donor's decision to support the organization. Recent modeling proves otherwise. "That relationship is not enough. The difference the organization makes in the life of a loved one or family member — through our many programs or services — turns out to be the most meaningful motivator," describes Hilary Noon. As a result, the marketing strategy is now focusing on how the American Cancer Society is "making a difference" in the lives of patients and their families.

data analysis experience. M.B.A.-trained Katie Edwards, an Amherst alumna, was recruited to the college following positions in financial services at American Express and in admissions at Harvard Business School. After completing his M.B.A., John Schwass was consulting for consumer packaged-goods companies before joining World Wildlife Fund as its senior director of fundraising operations and strategic analysis. Tom Chaves worked for nearly 17 years for a software provider serving primarily higher education clients before joining Lehigh, and Brian Dean left a career in pharmaceutical manufacturing and marketing to return to Notre Dame, his alma mater.

What skills are institutions seeking in advancement services staff? “We are looking first for staff members who are committed to the mission of the university, but also can create strategic and tactical plans, conduct SWOT (strengths, weaknesses, opportunities, and threats) analyses, understand how to present complex information in easy-to-use formats, and have change management and process improvement skills,” explains Dean. “We also have repurposed two positions to focus on tracking metrics, improving data quality, and streamlining gift processing.”

### CAMPAIGN PLANNING

“We are committed to developing world-class campaign metrics for the University of Notre Dame’s upcoming campaign,” says Brian Dean, who will have financial and technical analysis resources “dedicated almost completely” to the campaign. “As we move through the campaign, we want to track and report progress throughout the prospect management cycle to give campaign leaders a view of the entire pipeline and the management of relationships that ultimately will lead to campaign success. Campaign leaders will have access to data on a daily basis in a consistent, readable format with enough detail to support decisions, but without having to read through pages of spreadsheets.”

Parsons-Nikolic made a tough decision to eliminate a reporting position and hire a business intelligence analyst. “We are no longer able to hire individuals who only know how to generate reports; they must have a broader understanding of data analysis coupled with knowledge of our industry,” she says. “Our advancement team is headed by a strong leader with an ambitious vision for Villanova, so every position must support these goals.”

## Communication Skills Are Key

Still, communication and interpersonal skills are important. “Administrative services staff members must be comfortable making presentations and communicating regularly with development officers. In some cases, if data is incomplete, they may need to call donors directly for information,” says Anglin.

“While strong, individualized relationships with donors always will be key, being donor-centered and data-driven allows us to work smarter,” says Cris Lutz, planned giving director for **The Huntington Library, Art Collections, and Botanical Gardens**, a cultural, research, and educational institution in San Marino, California. Lutz was hired as associate director of major gifts to help strengthen and expand the institution’s donor base during its $175 million *For Generations to Come* campaign. Chaves concurs, “You can understand the information technology perspective and you can understand the business side of advancement, but at the end of the day this remains a relationship-based profession.” ❖

# Data Modeling Adds Value

## Nonprofits Follow Lead of Mass Marketers

Data alone may not boost fundraising performance, but data modeling can provide insight into how institutions can best segment audiences and target messages to various constituents.

### DONOR RATING SYSTEM

Lehigh has developed its own rating system for donor giving and involvement. "As we enter the second year of the silent phase of a campaign, we need to target our next 500 prospects," explains Tom Chaves. Fifteen percent of top prospects his team identified were previously "under the radar." His team also has created a "contactability" score based on the points of contact the donor provides. "We can be more strategic if we can make the connection between the amount of contact information we have collected and the level of donor or alumni engagement."

"World Wildlife Fund is using modeling to understand donor lifetime value and the 'value of transitional events,'" says John Schwass. "What are the transitions that move a typical member to a major contributor? What influences people making that transition? We are looking to answer those kinds of questions better in order to make optimal long- and short-term decisions for the organization."

In building models, interviewees suggest proceeding with caution. "You must be specific about what you want to model; there is no one size fits all," warns University of Washington's Walt Dryfoos. "For instance, a data model for donors likely to make bequests will differ from a model for donors looking to establish a charitable trust." In addition, models must define very specific characteristics among a fairly large pool of donors. "If you are looking at $100,000-plus donors, what characteristics do they have that can be applied to others you are looking to engage?" adds Tom Chaves of Lehigh University.

Seven years ago, World Wildlife Fund employed an RFM (recency of gift, frequency of gift, and monetary value) segmentation approach to target its direct mail solicitations.

## DID YOU KNOW?

### Tracking Data, Technology Use by Nonprofits

A November 2012 study conducted by the Nonprofit Technology Network of 398 professionals representing nonprofits across all sectors examined nonprofits and their relationship to data. Among the findings reported in "The State of Nonprofit Data:"

- Metrics related to fundraising performance are measured by more than two-thirds of organizations. Seventy-one percent of institutions track new people added to the mailing lists and 69 percent track new donors added in the past year.
- Far fewer organizations use those numbers to inform budgeting and program decisions. Some 39 percent of nonprofits survyed use donor data to make budgeting decisions. Only 26 percent of those surveyed used donor data to make program decisions.

A related 2012 report by the Nonprofit Technology Network on "The State of the Nonprofit Cloud" found the vast majority of non-profits (91 percent) use cloud-based software (any program accessed through the internet) and 40 percent of nonprofits surveyed use cloud-based constituent databases. Many non-profit executives did not realize that some of the services they take for granted, such as staff e-mail and broadcast e-mail, are cloud-based.

"We realized we could do better if we used the same information in a more effective way," says Schwass. "We began developing statistical models that eventually outperformed RFM segmentation by 30 to 40 percent." World Wildlife Fund used these initial models to guide mail and telemarketing solicitations, but now is applying models to "anything you can imagine, including the likelihood of event attendance, making a planned gift, and increasing the level of giving."

The Huntington conducted its first modeling exercise in 2008 discovering "an embarrassment of riches. We are fortunate and grateful to have more than our fair share of engaged members and friends who also have philanthropic capacity. As much as possible, we strive to target our efforts where they are likely to have the greatest impact," says Cris Lutz.

Thanks to the individualized sales pitches that mass marketers such as Target and Amazon are able to provide based on their models of retail behavior, donors have come to expect that customized level of service from other organizations. "Many institutional systems do not yet provide that level of personalization. We need to learn from the big retailers rather than reinvent the wheel," says Joseph Calger of University Hospitals of Cleveland. ❖

### REGIONAL PLANNING

Villanova's operations team is tapping its database for more information on where donors live, work, and travel to guide future planning for regional fundraising and events. "Our reporting environment allows us to measure fundraising success regionally and create realistic regional goals. We also can map out the locations of donors and the distances between donors to choose the best event locations. It's made planning visits and events much more efficient for us," says Cathleen Parsons-Nikolic. This effort dovetails with the opening of four new regional fundraising offices in Boston; Washington, D.C.; Los Angeles; and New York in anticipation of the university's upcoming comprehensive campaign.

### Data Drives Strategy

Of surveyed business professionals, 58 percent say analytics is playing a more integral part in their organization's strategy and operations than it did 12 months ago. Sixty-one percent say their organization is effective at analyzing information, and 67 percent of respondents report that their companies are gaining a competitive edge from the use of analytics, up from 58.3 percent in 2012 and 37.2 percent in 2011. ("From Value to Vision: Reimagining the Possible with Data Analytics," *MIT Sloan Management Review*, March 2013)

### Data Scientists in Demand

If you are planning to add an analytics professional to your staff, get in line. An October 2012 *Harvard Business Review* article, titled "Data Scientist: The Sexiest Job of the 21st Century," describes how the data scientist is "a new key player in organizations" and defines the position as "a high-ranking professional with the training and curiosity to make discoveries in the world of big data."

# Ratings Reconciliation

## *When Everyone Has an Opinion on Prospect Capacity, Who is Right?*

### By Dan Lowman

*Since joining GG+A in 2000, Dan Lowman's pioneering work with prospect analysis has been used at thousands of organizations worldwide, including those in Australia, Canada, Ireland, Israel, Lebanon, New Zealand, the United Kingdom, and the United States. He has worked with hundreds of educational and cultural organizations, as well as many national service and advocacy groups. Lowman, GG+A's senior vice president of analytics, led the team in 2004 that developed and launched DonorScape®, the first-ever web-based prospect screening service.*

Some variation on the following scenario plays out every day in development offices around the world: A third-party wealth screening exercise indicates that a person is a good prospect for a $100,000 gift. A prospect researcher conducts additional research and rates the prospect as a $250,000 donor.

An enthusiastic board member meets the individual at an event and sends an e-mail message of "definitely millions here" to the development office. Yet, the proposal entered into the system by the development officer is for a $25,000 gift.

A series of ratings reviews conducted by GG+A over the last two years finds overwhelmingly that these variations arise not because of fundamental differences in how prospects are evaluated, but because one actor in the equation has different information than the others. In the example described above, the initial wealth screening may have been based on limited company sales information, while the researcher found more current and comprehensive information. The board member may have been reacting to the donor's designer clothes and stories the donor told about a spectacular art acquisition. The development officer who submitted the proposal may have

Consensus

| Internal Giving Capacity Ratings | External Giving Capacity Ratings: $1,000,000+ | $250,000 to $999,999 | $100,000 to $249,000 | $25,000 to $99,999 | $10,000 to $24,999 | $2,500 to $9,999 | Less than $2,500 |
|---|---|---|---|---|---|---|---|
| $1,000,000+ | **6** | 5 | 2 | 8 | 0 | 0 | 2 |
| $250,000 to $999,999 | 2 | **28** | 11 | 15 | 2 | 0 | 0 |
| $100,000 to $249,999 | 1 | 14 | **96** | 69 | 6 | 0 | 4 |
| $25,000 to $99,999 | 2 | 11 | 120 | **4,813** | 411 | 50 | 254 |
| $10,000 to $24,999 | 2 | 2 | 12 | 2,434 | **2,546** | 166 | 257 |
| $2,500 to $9,999 | 0 | 1 | 1 | 251 | 482 | **482** | 141 |
| Less than $2,500 | 0 | 0 | 0 | 0 | 63 | 63 | **28** |

Internal Ratings Higher

External Ratings Higher

The table above shows a pool of prospects plotted by their capacity ratings, from internal sources in the rows and external sources in the columns. The white cells in the lower left include prospects for whom the external rating is higher than the internal rating, and the light blue cells include prospects who were given a higher capacity rating by internal sources than by external sources. In the top right of the chart, the boxed cells show prospects who are rated by internal sources as prospects for gifts of $100,000 or more, while external sources rate them below $10,000 – a significant disparity that is great enough to alter fundamentally the prospect relationship depending on the outcome of the solicitation. The development program should gather all available information and, along with members of the research, development management, and program leadership teams, collectively decide on a consensus value (dark blue cells forming a diagonal line across the table).

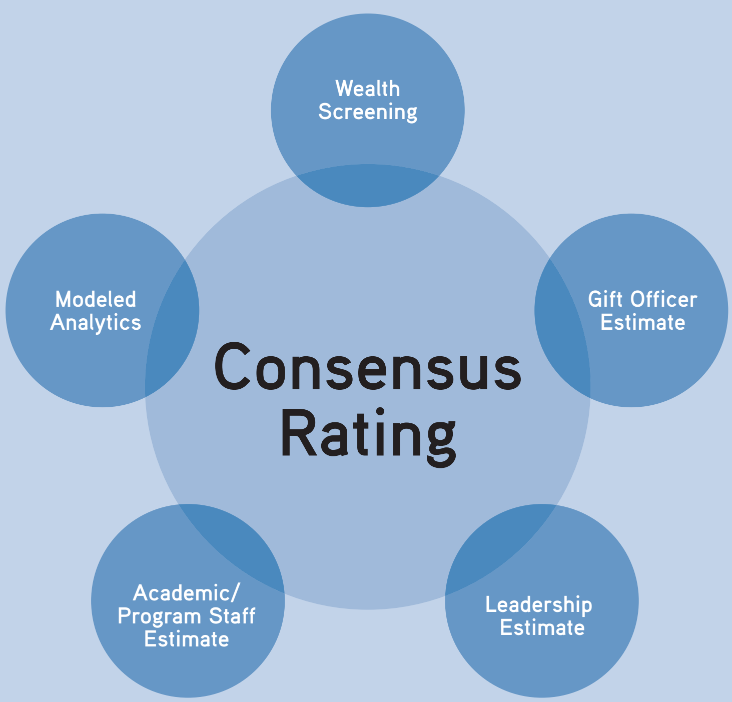
learned about the illiquidity of the prospect's business wealth, discovered that he has three children in college at the same time, and remembered that he is paying off a large pledge to a local hospital foundation.

There is no one formula, to date, that can accurately account for all of the nuances that lead to a successful solicitation. GG+A encourages organizations to develop a coherent rating structure that treats all of these evaluation as inputs into a "consensus" rating that answers the question: "Realistically, how much will we ask this person for within the next X years?" This question should facilitate a discussion between all of the actors. The end result is a goal that is accepted by each stakeholder. All future prospect activity is then designed around how the institution will solicit and secure a gift of that size within the given timeframe.

Many development offices have expanded this framework to include the following:

- Financial rating: How much could be given to any charity?
- Next-ask rating: How much will be asked for in the next solicitation?
- Remainder rating:  How much will be solicited before a given date, such as the end of a campaign?

Ratings can be revised as more information becomes available. Drawing on the knowledge and expertise of the advancement staff, the consensus rating can become a powerful tool for reporting, forecasting, and planning.




A consensus rating takes into account available background information and the perspectives of development staff members and institutional leadership to provide more accurate assessments for solicitations.

## Data is Power

*continued from page 1*

fundraisers to generate reports on an as-needed basis.

When Tom Chaves, assistant vice president for advancement services, arrived at **Lehigh University** in 2009, one of the first steps he took was developing a centralized reporting system. He oversaw the migration to a new database management system and the creation of what he calls "the Lehigh Development Office Toolkit," that provides easier access to various reports; a dashboard of key metrics in response to the chief development officer's call for greater accountability; and an "on-the-road tool" that can be updated "on the fly" and saved in a portable document format (PDF).

### GIFT PRICING POINT

Through analytics, the University of Washington discovered that ask levels are directly related to general "price points" set by the advancement team for scholarships, endowments, or named buildings with little consideration of the actual giving capacity of an individual donor. "This piece of analysis opened our eyes. We need to tie our solicitations to the vision and mission of the institution and to price points that reflect the donor's potential to give," says Susan Hayes-McQueen.

Increasingly, fundraisers need access to such reports through their mobile devices. "Front-line fundraisers must have the ability to access data directly on iPads, iPhones, and tablets," says **Amherst College's** Katie Edwards, executive director of advancement operations and analytics. "We also must make it as easy as possible to enrich our databases — to enter call reports, data updates, contact information — from those devices."

Cathleen Parsons Nikolic, associate vice president of development operations, agrees that to support fundraising

## HIPAA Privacy Rule Extends Access for Fundraisers

In January 2013, the U.S. Department of Health and Human Services issued its most recent modifications to the HIPAA Privacy Rule effective March 26, 2013. The modifications allow fundraisers to communicate more effectively with patients and offer greater clarity to the opt-out provision.

- The new rules make it clear that fundraising officers are permitted to receive and use the following information in segmentation, communications, and interactions with patients and their families: The department of service, the treatment physician, and the general outcome category (successful, sub-optimal, deceased).

- Fundraisers now have access to patient date of birth, as well as dates of service (when the patient received medical treatment) and the location or site of service. This information can help reduce duplication of communications to patients who received medical treatment a number of times in multiple locations.

- Patients and patient families must receive clear language indicating that they may opt out of fundraising communications (invitations, solicitations) through any combination of low-cost, low-burden means, such as a toll-free phone number, an e-mail, or web site. (Requiring patients to write a letter to opt out is not acceptable.) The opt-out rule applies to oral and written communications, and GG+A recommends documenting any oral opt-out request via written confirmation.

*For more information on how the latest HIPAA modifications may affect your organization, visit www.grenzebachglier.com and click on GG+A Webinar Archive. Select "Understanding the New HIPAA-HITECH Healthcare Privacy Rules" to hear Dan Lowman discuss the impact of the recent ruling on fundraising.*

efforts successfully, operations teams must meet development officers on their playing field, a strategy that has served Villanova well. "In December 2008, 90 percent of fundraising reports were generated in an *ad hoc* reporting environment," she describes. "Now, 75 percent of reporting is self-service, and end users can produce performance metrics reports, access mobile applications on their phones or tablets, and run the prospect reports they need in a more user-friendly format."

But do fundraisers regularly access available data and use it to guide decision-making? That answer varies across institutions, according to interviewees. "Ninety percent of our data is at the fingertips of front-line fundraisers, but how they use it depends on their level of sophistication and management's commitment," says Susan Hayes-McQueen, director of advancement research and relationship management at the **University of Washington**. "If you are a fundraiser working in a program that is less strategic and sophisticated in its approach, you won't be accessing much of the data. Other schools, like our School of Medicine, are very strategic, and fundraisers are focused on the data." The University of Washington has developed a prospect profile that allows front-line fundraisers to query specific data and, as McQueen describes, to produce "digestible reports that can be shared immediately with a dean about to make a phone call to a donor."

### PLANNED GIVING

The Huntington is using analytics to help guide planned giving efforts. "With approximately 35,000 membership households, we are able to capitalize on the wealth of donor data to target members of a certain age and philanthropic inclination who should receive our planned giving newsletter," says Cris Lutz. The Arabella and Henry Huntington Heritage Society, an honorary society that recognizes and acknowledges individuals who have included The Huntington in their estate plans, currently has 250 members.

## Protecting Data Integrity

Across the board, data integrity and security is critical. **University of Notre Dame** recently has focused on enhancing processes for basic administrative services functions to improve data accuracy. "We handle 130,000 transactions and update many thousands of records annually," explains Brian Dean, senior director of operational and administrative strategy. "With a combination of marginal and dramatic changes, we have seen a 40 percent improvement in the speed and accuracy of gift data processing and reporting."

When it comes to data security, the guidelines established through the Health Insurance Portability and Accountability Act (HIPAA) and the Family Educational Rights and Privacy Act (FERPA) make it easier for some institutions to set standards for protecting patient and student/alumni privacy. "There are many ways to protect the privacy of our patients and donors, and the HIPAA requirements provide the foundation," says Joseph Calger, director of development services for **University Hospitals of Cleveland**.

With FERPA in mind, Notre Dame has put in place a number of safeguards to manage its database, working with the university's main technology office to undertake "a massive university-wide cleaning of social security numbers, which were used as individual identifiers for students and continued to follow them into the alumni and donor database." Dean also is working to eliminate shadow databases in various parts of the university. "As more institutes and centers on campus seek access to data, we need to ensure we are all using the same database so we can provide the most accurate information." ❖

# The Search is On

*New Data Sources Provide Clues to Target Donors*

In addition to collecting traditional demographics on donors, such as addresses, employers, income, and family information, many organizations are searching for data that can provide additional clues about donors and giving patterns. "The **University of Washington** is collecting more behavioral data and data from external sources to integrate into prospect management reports that give front-line fundraisers more robust information," says Susan Hayes-McQueen.

"Our prospect pipeline is healthy and deep," says Emily Parkhurst, who acknowledges the **United States Naval Academy's** recent wealth screening and PRIZM™ segmentation of the donor pool will help better identify top prospects. "We have more than 50,000 graduates and thousands of others who have spent time at the Academy. We know who lives at the top of the pyramid, and screening and modeling have helped with a number of discoveries in the middle of the pyramid."

A good amount of demographic data is coming from the digital world. Last year, Hilary Noon added digital analytics to her portfolio at **American Cancer Society** to monitor customer behavior and feedback online. "It is interesting to see how much information you can gain from the digital channel," says Noon. "In support of a number of campaigns, we are monitoring and measuring each step as a customer engages on one of our websites. In the digital environment, we get very quick feedback, so the more effective we are at feeding that insight back to the business lead, the more quickly they can make adjustments."

### GRATEFUL PATIENT PROGRAM

The University of California, San Francisco is introducing a new grateful patient program this spring. "We have thousands of patients come to our hospital every month. Advancement services needs to help identify high-value prospects and work with the development officers in designing a prospect engagement plan," explains Debbie Anglin.

At **World Wildlife Fund**, John Schwass is trying to get a better handle on the channels that drive donors to make gifts. "In the old days, you would do a direct mailing and the checks would come in response. Today, in a multi-channel environment, direct response can be driven by an ad, the website, a billboard, or an op-ed piece." Increasingly the World Wildlife Fund is asking online donors to complete exit surveys. "We want to understand more about the drivers. We know certain channels may never be clinchers in the decision to make a gift, but they are important parts of our whole message. The survey results can help us assign value to the various channels."

The following examples demonstrate how advancement services is leading efforts to build institutional knowledge about donors:

**Social Network Connections**
Critical information is now available in unstructured formats, such as social networks, that can easily be shared with fundraisers. **Villanova University** is just starting to map links to social media sites, such as LinkedIn, and connect them directly to the donor database to capture the most updated information available.

**Institutional Allegiance**
**Lehigh University** looked closely at the affinity of its donors to assess their philanthropic allegiance to Lehigh. "Based on our research, we have created a new staff position to work exclusively with affinity groups and help define how to target certain groups, such as Lehigh lawyers or former Choral Arts Society members," says Tom Chaves.

**Donor Relationship Data**
**University of Notre Dame** is enhancing its ability to collect and manage data on donors who are not parents or alumni. "There are so many people who never set foot on our campus, but they have some affinity with Notre Dame, in large part because of its Catholic identity," says Brian Dean. "Do they buy our paraphernalia? Do they watch football games? Do they visit our website, pray.nd.edu, and request prayers? The key is understanding their interests and interactions, including through blogs and Twitter." ❖