Scoring and Finding your Best Donor Prospects



Webinar – April 29th, 2021

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Hi, I'm Allen

Colleagues and clients see me as one or more of these:

- Marketer
- Salesperson
- Fundraiser
- Consultant
- Strategist
- Data governance custodian





Hi, I'm Jen

Colleagues and clients see me as one or more of these:

- Marketer
- Salesperson
- Consultant
- Strategist
- Data geek





Key Inheritance Trends





Inheritance Received by Province

Average Lifetime Inheritance Received by Province

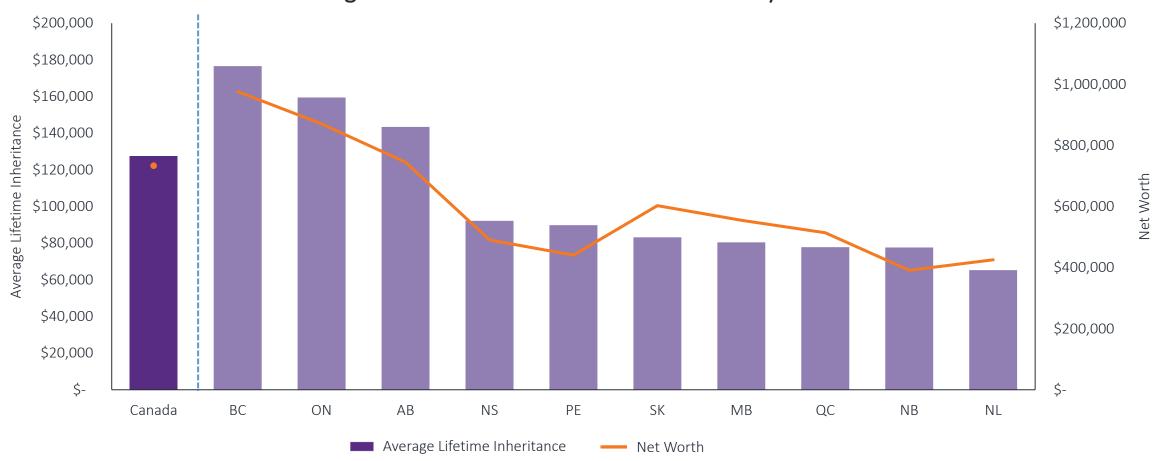


Source: Statistics Canada Survey of Financial Security



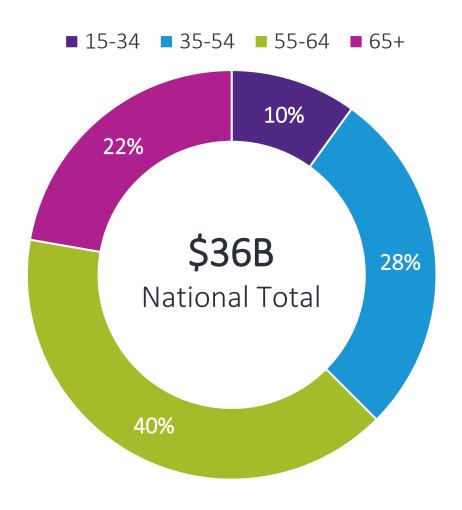
Inheritance Received and Net Worth

Average Lifetime Inheritance and Net Worth by Province



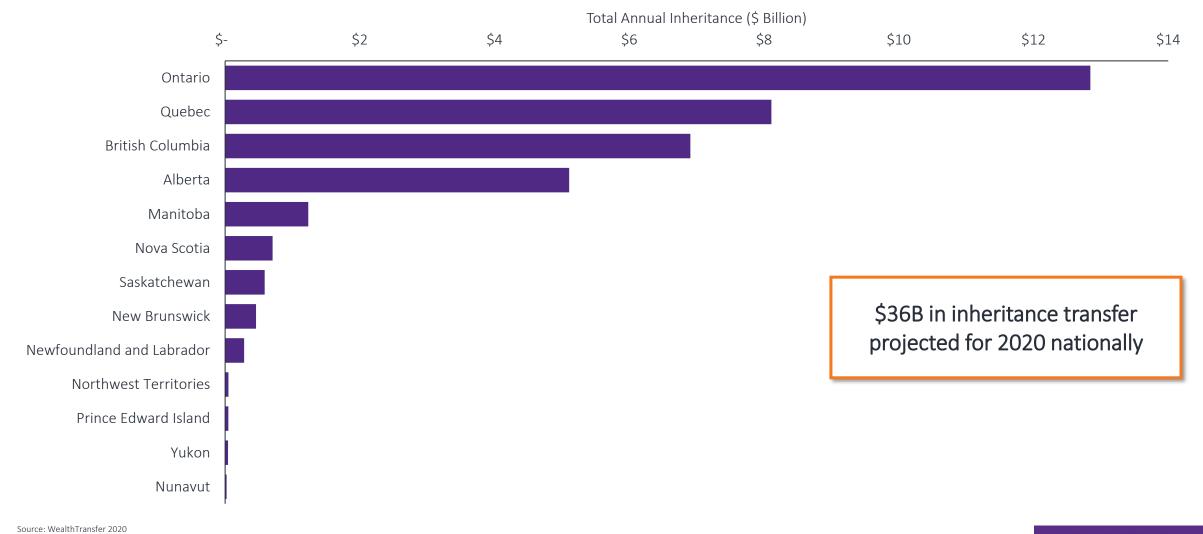
Source: Statistics Canada Survey of Financial Security, WealthScapes 2020

Inheritance Not Just for Older Generation



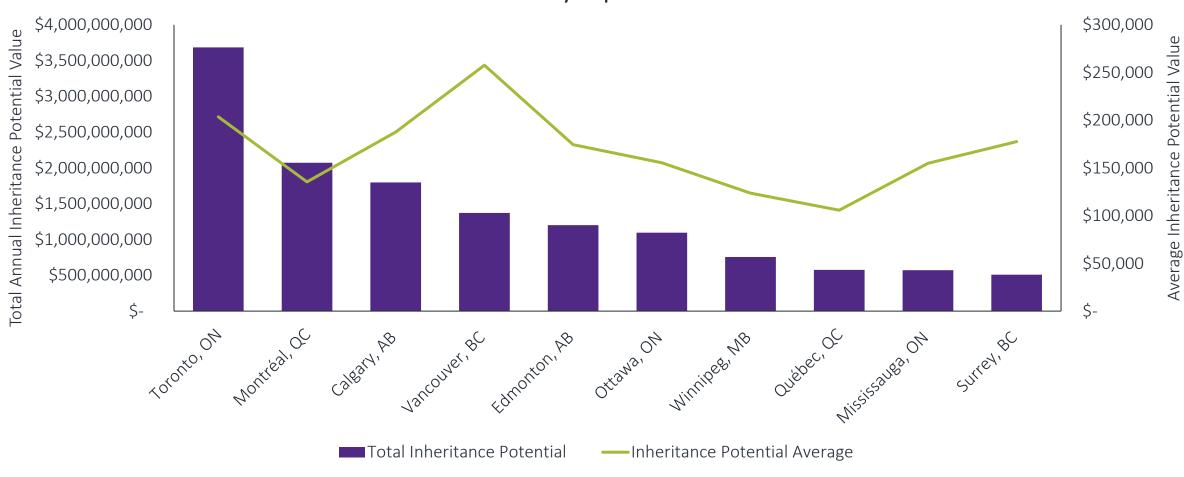
Source: WealthTransfer 2020

2020: Total Estimated Inheritance by Province



Not All Markets Expected to Behave the Same

Inheritance Potential by Top 10 Census Subdivisions



Source: WealthTransfer 2020

Key Trends



Aging population and desire to leave a legacy for family

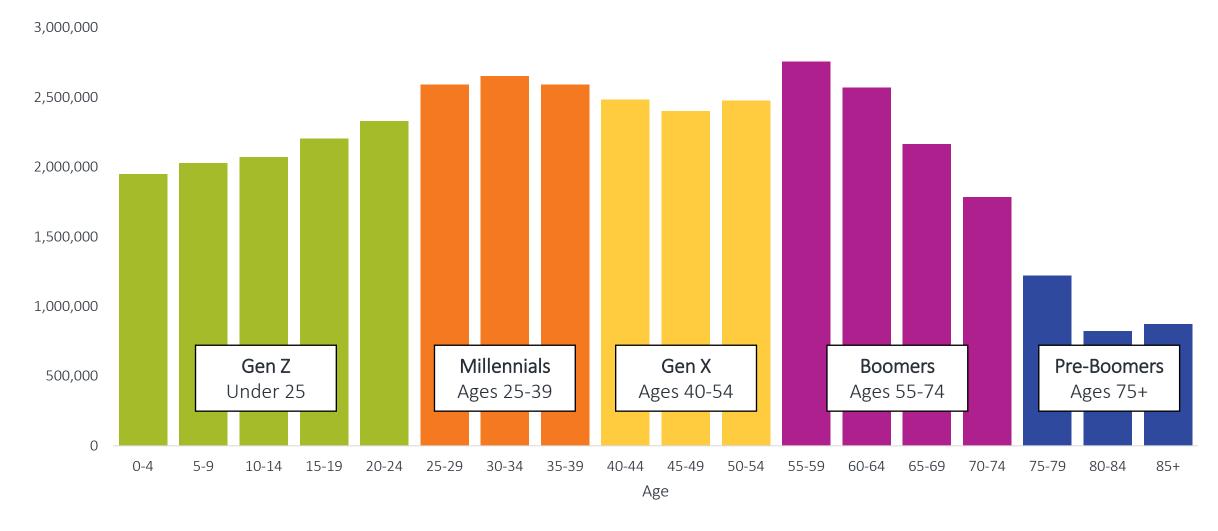


Largest impending transfer of wealth expected



Millennials are
different from older
generation

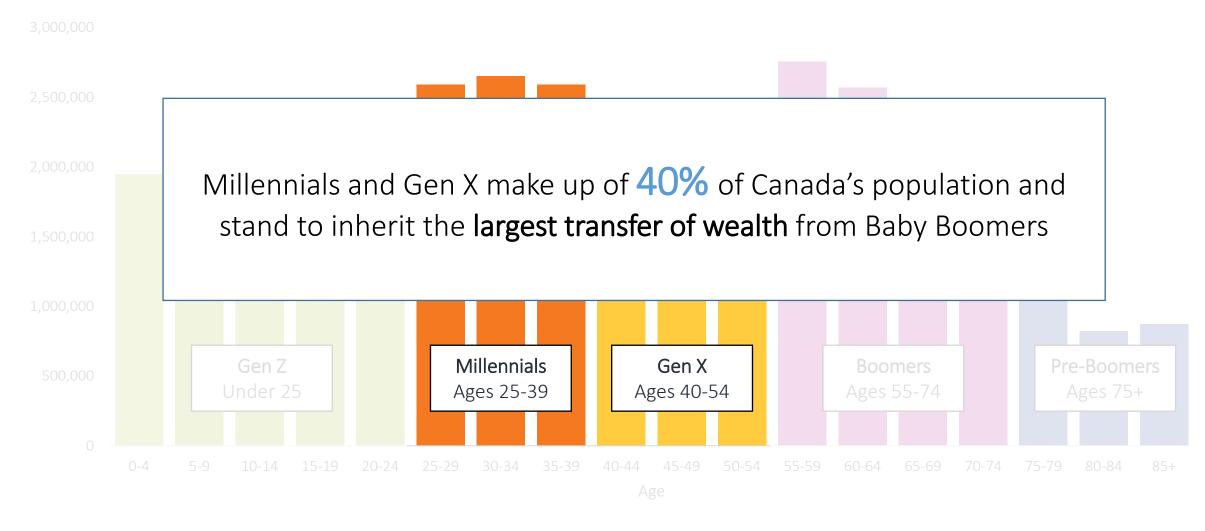
Canada's Changing Demographics



Source: DemoStats 2020



Canada's Changing Demographics



Source: DemoStats 2020



Wealth Data and Scoring



Constituent Wealth Insights & Scoring

Optimized Donor Engagement through EA's **DonorRank** System



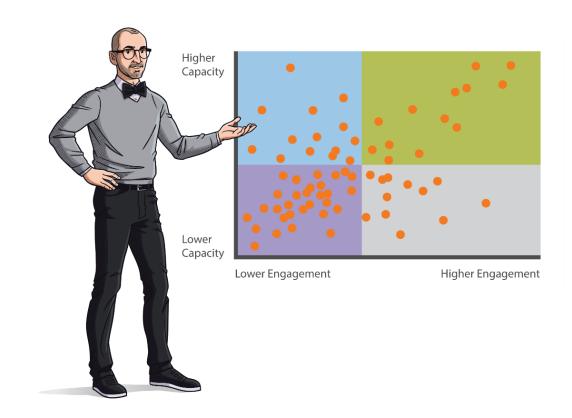
Prospect



Scoring



Capacity



A cost effective and efficient tool that any fundraiser can use.



Constituent Wealth Insights & Scoring

Optimizing Donor Engagement through EA's NEW DonorRank System









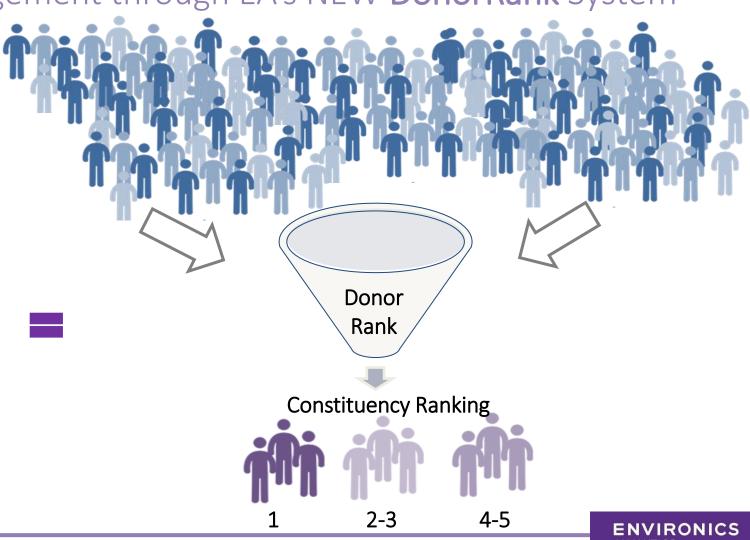






Constituent Engagement Score

- Frequency
- Lifetime Giving History



DonorRank - Scoring

	Sample Cleet Data					Down tarking Ranking 1 - Low, 10 - High [s for Text Down Rankil]					Valisups ledide Bindo kajifo													Weblinste															
Constituent D	Ciy	Province	Postal Code PACIA Segment.	Lifetime Give Total Number of G	Average Net Worth/HHLD Rank	Historical Contributions Rank	Amount Donated to Hospitals (Pst Yr) Rank	Social/alues Rank	Total Door H	Household Income - Average	Household Disposable Ho Income - Average	ousehold Discretionary Income - Average	Ŧ	herage Assets-Incidence	Assets - Average	Liquid Assets - Incidence Liq	uid Assets - Average In	ksets-RSP- Liquid ódence ,	Assets-169- Diquid Ass Guerage , in	ets-Nor-RSP - Diquid Ae cidence - A	issets - Non-RSP - Average		erage Total Savings - Incidence v	Total Savings - Average	Total Investments - Ti Incidence	Total Investments - Average	Total Real Estate - Total Real Esta Incidence - Average		t- Total Consumer Debt- Employ Average	er Persion Plans - Employer Persion A Incidence - Average	Plans - Total Charitable Contributions - Aver	Charitable contributions Religious organizations Average	s-Charitable contributions - Other organizations - Average y	Total Households	Inheritance Potential- Incidence - Total Incidence Score - Total	Inheritance Potential - Incidence Index - Total	neritanze Potential - Inher Value - Total Aug	eritance Potential - Inheritance Potenti erage Value-Total Value Score-Tot	ertial - Inheritance Potential- iotal Value Index - Total
1000721	Mithurst	Ortario	191 OM7 5 - First Class Families	\$ 92,815	99 10	10	5	9	5	190,014 \$	141,014.82 \$	100,892.05	100 \$ 1,49	8,881.82 1.00	\$ 1,663,970.23	100 \$	860,975.59	0.88 \$	305,317.95	100 \$	555,657,63	099 \$	25,096.41 1.00	5 148,455.73	096 \$	712,539.86	0.98 \$ 803,1	D2.64 D.	99 \$ 40,724.39	059 \$ 215,7	00.70 \$ 1,32	319 \$ 55856	5 76469	34	0.77 4	120 \$	151,62901 \$	197,388.88 4	152
1002329	Toronto	Ortario	M4N1I2 12 - Eat, Play, Love	\$ 1,000	1 10	10	9	10	5	122,109 \$	84,001.76 \$	57,466.65	100 \$ 696	3,940.54 1.00	\$ 7,119,063.88	100 \$	6,086,151.31	100 \$	1,449,517.65	100 \$	4,636,633.66	100 \$	55,123.34 1.00	\$ 2,166,138.77	100 \$	3,920,012.54	0.96 \$ 1,082,9	1257 1	00 \$ 52,290.44	0.58 \$ 220,8	48.24 \$ 5,115	954 \$ 1,883.51	1 5 3,006.09	46	039 4	114 \$	300,751.02 \$	304,094.43 5	235
1000361	Barrie	Ortario	LAM SL6 53 - Silver Flats	\$ 400	1 7	10	1	9	4	109,431 5	84,560.93 \$	58,871.79	100 \$ 65	3,440.88 100	\$ 761,921.93	100 \$	457,419.64	052 \$	114,521.55	099 \$	352,898.09	098 \$	58,481.05 0.99	\$ 150,677.40	0.76 \$	296,742.24	0.76 \$ 304,5	00.29 O.	98 \$ 26,428.37	053 \$ 1583	45.25 \$ 1,28	019 \$ 458.72	S 77147	108	133 2	66 \$	29,175.37 \$	179,832.59 5	139
1001083	Barrie	Ortario	LAWSLE 16 - Sawy Seniors	\$ 4,800	6 7	10	1	9	4	109,431 5	84,560.93 \$	58,871.79	100 \$ 65	3,440.88 100	\$ 761,921.93	100 \$	457,419.64	052 \$	114,521.55	099 \$	352,898.09	098 \$	58,481.05 0.99	\$ 150,677.40	0.76 \$	296,742.24	0.76 \$ 304,5	00.29 O.	98 \$ 16,428.37	053 \$ 1583	45.25 \$ 1,28	019 \$ 458.72	S 77147	108	133 2	66 \$	29,175.37 \$	179,832.59 5	139
1001315	Barrie	Ortario	LAM 1H7 16 - Savy Seniors	\$ 458	9 7	8	5	9	3	101,363 \$	81,410.96 \$	55,543.59	100 \$ 65	8,440.88 1.00	\$ 761,921.93	100 \$	457,419.64	052 \$	114,521.55	0.99 \$	352,898.09	098 \$	68,481.05 0.99	\$ 160,677.40	0.76 \$	296,742.24	0.76 \$ 3045	02.25	98 \$ 26,428.37	053 \$ 1583	525 \$ 79	988 \$ 350.83	\$ 49.05	40	056 2	74 \$	82,340.42 \$	147,213.12 2	114
1000061	Barrie	Ortario	LANDAS DB - Multicultural Corne	s \$ 465	11 8	6	- 6	9	3	154,635	120,445.58 \$	87,963.58	100 \$ 88	5,291.97 1.00	\$ 1,118,407.94	099 \$	432,312.01	0.49 \$	113,392.51	0.99 \$	318,91951	099 \$	18,115.97 0.99	\$ 18,469	0.72 \$	288,905.43	097 \$ 671,0	95.90 O	99 \$ 73,120,64	0.65 \$ 296,3	67.10 \$ 1,71	795 \$ 6714	\$ 1,045.47	11	0.23 4	112 \$	38,599.11 \$	166,791.74 1	129
0003350	Vinesing	Ortario	191 088 26 - Country Traditions	\$ 340	12 9	5	í	10	3	145,486 5	115,576,25 \$	78,635.61	100 \$ 1,15	0,153.60 1.00	\$ 1,455,125.84	100 \$	604,872.99	0.65 \$	206,110.66	100 \$	398,762.33	099 \$	1.00	\$ 221,987.40	0.80 \$	382,885.60	0.96 \$ 850,2	52.85 0.	99 \$ 86,994.12	0.66 \$ 202,5	1572 \$ TK	292 \$ 466.08	S 296.85	2	0.02 2	9 \$	1,518.44 \$	68,004.57 1	52
1004269	Callander	Ortario	POH 1HO 26 - Country Traditions	\$ 20,050	3 5	10	9	5	3	116,685 \$	90,314.79 \$	634910	100 \$ 46	8,907.87 0.99	\$ 64,356.21	098 \$	202,267.63	040 \$	62,980.06	098 \$	139,267.57	099 \$	55,44835 0.98	\$ 88,572.45	062 \$	113,695.18	0.89 \$ 442,0	BESS 0.	99 \$ 56,90831	0.61 \$ 178,5	36.07 \$ 595	5B \$ 20136	9 \$ 313.64	2003	4391 4	111 \$	4321,549.76 \$	98,410.08 5	76
1007412	Buditorn	Ortario	KOL 1.0 49 - Backcountry Boom	rs \$ 50	1 7	6	4	9	2	105,441	83,995.80 \$	59,825.20	100 \$ 65	1,265.08 1.00	\$ 800,552.35	100 \$	310,653.68	049 \$	79,665.87	100 \$	230,987.81	099 \$	100 19,286,27	\$ 116,581.38	065 \$	194,07230	0.98 \$ 489,8	98.67 O.	98 \$ 37,626.87	054 \$ 192,6	8138 \$ 81	261 \$ 563.25	32938	1345	3291 4	130 \$	5,585,414.06 \$	169,720.67 5	31
1008979	Oshawa	Ortario	L1G6L8 23 - Mid-City Mellow	\$ 120	3 5	6	9	1	2	95,333 \$	77,627.68 \$	51,527.99	100 \$ 45	B,350.76 1.00	\$ 657,329.18	099 \$	177,829.66	035 \$	46,822.72	0.99 \$	131,006.94	098 \$	B,97842 0.99	\$ 94,491.98	0.60 \$	88,337.67	0.98 \$ 479,4	99.53	97 \$ 41,964.37	0.65 \$ 274,5	496 \$ 78	4.10 \$ 382.86	\$ 40124	5	0.09 3	99 \$	4,382.72 \$	47,091.11 1	36
1003664	Barrie	Ortario	LAW354 16 - Sawy Seniors	\$ 75	1 7	6	- 6	- 6	2	82,553	68,066.13 \$	45/5125	100 \$ 65	8,440.88 1.00	\$ 761,921.93	100 \$	457,419.64	052 \$	114,521.55	0.99 \$	352,898.09	098 \$	68,481.05 0.99	\$ 160,677.40	0.76 \$	296,742.24	0.76 \$ 3045	02.25 O.	98 \$ 26,428.37	053 \$ 158,3	525 \$ 85	172 \$ 396.70	\$ 455.00	41	0.44 2	58 \$	81,348.78 \$	183,642.32 2	10
0013220	Barrie	Ortario	L4N SG3 5- First Class Families	\$ 129	1 4	8	1	1	2	90,509 \$	72,657.10 \$	48,020.39	100 \$ 40	9,690.71 100	\$ 57951357	099 \$	226,279.07	045 \$	60,179.48	099 \$	166,099.59	099 \$	49,832.86 0.99	\$ 82,346.10	0.70 \$	143,932.97	0.88 \$ 353,	3450 O	99 \$ 64,236.44	0.61 \$ 218,6	43.56 \$ 75	558 \$ 596.05	5 21959	2	004 4	113 \$	752.24 \$	17,740.25 1	14
1000181	Barrie	Ortario	L4WS1 9 - Boomer Biss	\$ 75	2 8	6	3	1	2	343,147 \$	242,860.61 \$	190,291.81	100 \$ 88	5,291.97 100	\$ 1,118,407.94	099 \$	432,312.01	049 \$	113,392.51	099 \$	318,91951	099 \$	18,115.97 0.99	\$ 18,406.9	0.72 \$	288,905.43	097 \$ 671,0	95.92 O	99 \$ 73,120,64	0.65 \$ 296,3	67.10 \$ 4,05	117 \$ 1,302.25	9 \$ 2,668.88	8	020 5	135 \$	26,757.80 \$	131,755.99 1	102
1007510	Vinesing	Ortario	L9KOW2 4-Turba Burbs	\$ 1,075	46 9	4	1	10	2	154,046 \$	114,506.28 \$	78,674.34	100 \$ 1,15	0,153.60 1.00	\$ 1,455,125.84	100 \$	604,872.99	0.65 \$	206,110.66	100 \$	398,762.33	0.99 \$	14,972.24 1.00	\$ 221,987.40	0.80 \$	382,885.60	0.96 \$ 850,2	52.85 0.	99 \$ 86,994.12	0.66 \$ 202,5	1572 \$ 1,16	7.81 \$ 578.49	5 589.37	4	0.11 5	146 Š	15,565.73 \$	142,254.12 1	110
1049582	Victoria Harbour	Ortario	LOX 2A0 43 - Happy Medium	\$ 30	1 4	5	- 1	- 6	1	96,187	76,836.91 \$	52,914.31	100 \$ 49	2,775.30 1.00	\$ 589,277.40	100 \$	175,578.87	040 \$	57,489.07	100 \$	118,089.79	0.99 \$	56,502.10 0.99	\$ 68,777.49	056 \$	106,801.44	096 \$ 413)	98.53 O.	98 \$ 49,843.57	0.63 \$ 189,8	96.30 \$ 60:	BAD \$ 362.17	7 S 24165	2219	48.03 4	115 \$	3,734,777.68 \$	77,755.96 5	60
0002855	Vinesing	Ortario	LOL 140 26 - Country Traditions	\$ 655	30 6	3	- 1	4	1	103,463 \$	82,501.09 \$	56,256.09	100 \$ 57	8,720.46 100	\$ 809,305.44	100 \$	240,708.27	0.48 \$	87,002.19	099 \$	153,501.08	0.99 \$ 1	30,584.98 0.99	\$ 74,30.5	0.68 \$	166,572.82	0.95 \$ 568)	02.17 O.	99 \$ 66,816.86	0.61 \$ 222,9	93.09 \$ 60.49	491 \$ 367.00	S 24791	136	284 4	111 \$	267,860.03 \$	94,258.20 5	73
1022658	Waterdown	Ortario	LDR 2HO 23 - Mid-City Mellow	\$ 10	1 5	1	10	9	1	122,108 \$	97,608.00 \$	68,856.54	100 \$ 45	0,012.33 0.99	\$ 507,110.59	099 \$	268,926.78	042 \$	65,62193	099 \$	203,304.85	0.96 \$	97,106.25 0.99	\$ 71,245.30	061 \$	197,681.48	057 \$ 318;	91.81 0.	96 \$ 40,871.64	0.47 \$ 142,6	42.50 \$ 1,111	002 \$ 62277	7 \$ 487.26	2451	4284 3	93 \$	4,997,895.81 \$	116,423.23 5	90
1027234	Newmarket	Ortario	13/9/G 53 - Silver Flats	\$ 50	1 4	4	9	- f	1	66,615 \$	\$ 82,596,62	36,057.87	100 \$ 49	2,078.81 0.99	\$ 567,773.13	098 5	202,710.98	030 \$	48,055.27	098 \$	154,655,71	097 \$	35,694.31 0.98	\$ 94,847.22	0.45 \$	107,863.76	0.68 \$ 365,0	E2.15 0:	97 \$ 50,438.37	0.49 \$ 139,0	08.31 \$ 560	5.90 \$ 290.59	9 \$ 27530	119	152 2	88 S	227,915.15 \$	149,751.57 5	116
100604	Bradford	Ortario	132285 43 - Happy Medium	\$ 115	1 1	8	10	5	1	102,704 \$	89,454.09 \$	57,051.78	100 \$ 22	9,690.16 1.00	\$ 284,032.41	099 \$	112,584.79	0.26 \$	28,460.93	099 \$	84,123.86	0.95 \$	54,352.25 0.99	\$ 58,855.20	0.43 \$	53,749.58	0.42 \$ 171,4	47.62 O.	95 \$ 20,845.26	036 \$ 82,7	8294 \$ EX	207 \$ 399.96	5 242.12	12	148 3	93 \$	165,491.33 \$	115,712.02 4	89
1026097	Barrie	Ortario	L4M 288 43 - Happy Medium	\$ 10	1 8	1	4	9	1	184,890 \$	141,371.66 \$	105,355.64	100 \$ 88	5,291.97 1.00	\$ 1,113,407.94	099 \$	432,312.00	0.49 \$	113,392.51	099 \$	318,91951	0.99 \$	18,115.97 0.99	\$ 143,406.58	0.72 \$	288,905.43	097 \$ 671,0	95.90 O:	99 \$ 73,120.64	0.65 \$ 286,3	67.10 \$ 1,42	0.85 \$ 600.47	7 5 82039	219	371 3	90 \$	241,403.77 \$	65,090.12 5	50
1005129	Barrie	Ortario	LAM 303 S7 - Jugging Acts	\$ 5,946	14 3	10	1	1	1	116,492 5	89,029.98	60,444.05	100 \$ 36	8,069.87 100	\$ 458,963,98	100 \$	232,868.87	050 \$	58,582.90	100 \$	174,285.96	099 \$	90,89411 1.00	\$ 102,730.35	062 \$	130,13852	0.65 \$ 226,1	95.11 0.	98 \$ 3636511	0.45 \$ 15,8	3099 \$ 1,14	373 \$ 54050	5 603.23	16	0.26 3	85 S	42,8414 \$	165,079.11 1	127
0005690	Barrie	Ortario	LAWSLE 16 - Sawy Seniors	\$ 510	9 5	8	1	5	1	114,996	91,872.09 \$	62,436.38	100 \$ 45	9,567.90 1.00	\$ 714,948,44	095 \$	130,144.35	0.27 \$	34,991.64	095 \$	95,152.72	100 \$	21,28054 0.91	\$ 2963.4	060 \$	100,490.93	096 \$ 584,7	04.09 1	00 \$ 72,152.71	0.66 \$ 249,2	89.60 \$ 66-	493 \$ 397.06	5 267.87	108	133 2	66 \$	299,175.37 \$	179,832.59 5	139
0007946	Barrie	Ortario	L4N 2AB 7 - Mature & Secure	\$ 20	1 8	1	5	9	1	155,667 5	120,298.51 \$	89,149.36	100 \$ 88	5,291.97 1.00	\$ 1,118,407.94	0.99 \$	432,312.00	0.48 \$	113,39251	099 \$	318,919.51	099 \$	18,115.97 0.99	\$ 18,4669	0.72 \$	288,905.43	097 \$ 671,1	95.90 0.	99 \$ 73,120.64	0.65 \$ 296,3	67.10 \$ 1,84	7.73 \$ 665.49	5 1,182.27	13	0.28 4	115 \$	35,67460 \$	127,45255 1	98
00006	Barrie	Ortario	LAN SNB 2 - Wealthy & Wide	\$ 20	1 8	2	3	9	1	281,345 5	183,178.87 \$	197,694.01	100 5 88	5,291.97 1.00	\$ 1,118,407.94	099 \$	430,312.00	0.6 \$	113,392.51	099 \$	318,91951	099 \$	18,115.97 0.99	\$ 13,46.9	0.72 \$	288,905.43	0.97 \$ 67.1,1	95.90 O	99 \$ 73,120.64	0.65 \$ 2863	67.10 \$ 1,86	016 \$ 8663	7 5 993.79	17	036 4	113 \$	44,397.71 \$	123,300.94 1	95
0049779	Barrie	Ortario	L4N 8/G 4 - Turbo Burbs	\$ 220	3 5	8	1	5	1	123,385 \$	96,631.06 \$	65,617.30	100 \$ 45	9,567.90 1.00	\$ 714,948,44	095 \$	130,144.35	0.27 \$	34,991.64	095 \$	95,152.72	100 \$	21,28054 0.91	\$ 2963.4	060 \$	100,490.93	096 \$ 584,7	04.09 1	00 \$ 72,162.71	0.66 \$ 249,2	89.60 \$ 00.88	6.16 \$ 319.80	3 24636	38	0.83 4	117 \$	67,054.61 \$	80,375.86 2	£2
0017057	Barrie	Ortario	L4N4S3 13 - Family Mode	\$ 15	1 4	4	1	10	1	230,892 5	164,654.27 \$	119,999.46	100 \$ 42	9,690.71 1.00	\$ 57951357	0.99 \$	226,279.07	045 \$	60,179.48	099 \$	166,099.59	099 \$	49,832.86 0.99	\$ 82,346.10	0.70 \$	143,932.97	0.88 \$ 353,	B450 0:	99 \$ 64,236.44	0.61 \$ 218,6	43.56 \$ 2,65	265 \$ 1,348.36	5 1,304.29	11	0.19 3	94 \$	40,572.32 \$	208,361.32 1	161
1051992	Aliston	Ortario	LSR 1M2 25 - Suburban Sports	\$ 15	1 5	4	1	4	1	123,848 5	98,721.08 \$	68,144.49	100 \$ 45	4,156.65 1.00	\$ 698,659.06	100 \$	203,888.79	032 \$	37,520.68	100 \$	165,968.11	099 \$	14,502.41 1.00	\$ 64,781.84	0.65 \$	139,106.95	091 \$ 494,7	70.27 0.	99 \$ 78,601.49	055 \$ 1487	04.00 \$ 835	970 \$ 53275	9 5 30690	38	0.65 3	91 \$	73,640.56 \$	113,231.50 2	87
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What is WealthTransfer?



Ability to quantify the inheritance opportunity by number of households and dollars in given year



Incidence and Value Scores to compare markets and donors



Actionable at the 6-digital postal code



10 months of development and annual updates



Primary source – Survey of Financial Security modeled to the six digit postal code using our Econometric & Demographic models, Age by Income, Urbanity, Taxfiler, PRIZM plus custom data from Statistics Canada



Privacy friendly and exclusive data that integrates with EA's suite of products



What do I want to evaluate?

- ✓ History with the organization
- ✓ Long-term assets or assets that are not easily accessible
- ✓ Age
- ✓ Likelihood to receive an inheritance

Who bubbled to the top?

Sample Client Data														
Constituent ID	City	Province	Postal Code	PRIZM Segment ▼	Lifetime Give	Total Number of Gifts								
1000721	Midhurst	Ontario	L9X 0M7	5 - First Class Families	\$ 92,815	93								
1002328	Toronto	Ontario	M4W1K2	12 - Eat, Play, Love	\$ 1,000	1								
1000361	Barrie	Ontario	L4M-5L6	53 - Silver Flats	\$ 400	3								
1001083	Barrie	Ontario	L4N4S3	19 - Family Mode	\$ 4,800	6								
1001319	Barrie	Ontario	L4M 1H7	16 - Savvy Seniors	\$ 498	9								
1000061	Barrie	Ontario	L4N1H3	18 - Multicultural Corners	\$ 465	11								
1003350	Minesing	Ontario	L9X OB8	26 - Country Traditions	\$ 340	12								
1004269	Callander	Ontario	POH 1H0	26 - Country Traditions	\$ 20,050	3								
1007412	Buckhorn	Ontario	KOL 1JO	49 - Backcountry Boomers	\$ 50	1								
1018979	Oshawa	Ontario	L1G6L8	23 - Mid-City Mellow	\$ 120	3								
1003664	Barrie	Ontario	L4M3S4	16 - Savvy Seniors	\$ 75	2								
1013220	Barrie	Ontario	L4N 5G3	5 - First Class Families	\$ 129	2								
1000181	Barrie	Ontario	L4N4S1	9 - Boomer Bliss	\$ 75	2								
1007510	Minesing	Ontario	L9X 0W2	4 - Turbo Burbs	\$ 1,075	46								
1049582	Victoria Harbour	Ontario	LOK 2AO	43 - Happy Medium	\$ 30	1								
1002855	Minesing	Ontario	LOL 1YO	26 - Country Traditions	\$ 655	31								
1022658	Waterdown	Ontario	LOR 2HO	23 - Mid-City Mellow	\$ 10	1								
1027234	Newmarket	Ontario	L3Y8K9	53 - Silver Flats	\$ 50	2								
1016304	Bradford	Ontario	L3Z2B5	43 - Happy Medium	\$ 115	2								
1026097	Barrie	Ontario	L4M 2R8	43 - Happy Medium	\$ 10	1								
1005123	Barrie	Ontario	L4M 3C8	57 - Juggling Acts	\$ 5,946	24								
1015690	Barrie	Ontario	L4M5L6	16 - Savvy Seniors	\$ 510	9								
1007946	Barrie	Ontario	L4N 2A9	7 - Mature & Secure	\$ 20	2								
1010066	Barrie	Ontario	L4N 5N8	2 - Wealthy & Wise	\$ 20	1								
1049779	Barrie	Ontario	L4N 8K9	4 - Turbo Burbs	\$ 220	3								
1017057	Barrie	Ontario	L4N4S3	19 - Family Mode	\$ 25	1								
1051892	Alliston	Ontario	L9R 1M2	25 - Suburban Sports	\$ 25	1								



Meet Constituent 1001083

- ✓ Made 6 gifts with a lifetime give of \$4,000
- ✓ Assets:
 - ✓ Avg. HH Income \$238K
 - ✓~\$300K in Real Estate
 - ✓ High likelihood of a pension with an average value of \$158K
 - ✓ Over \$250K in RRSPs
- ✓ Age ~35 54
- ✓ Potential inheritance of \$179K

FAMILY MODE SUBURBIA

Suburban, upscale middle-aged families

Constituent 1001083

- Live in the suburbs
- Maintainers are aged 35 54
- Children at home aged 10 -19
- Skiing, golf, hockey
- Boating and camping vacations
- Digitally-savvy
- Key values
 - National Pride
 - Need for Escape
 - Legacy



Case Study: Hospital Foundation

Constituent Wealth Insights & Scoring

Optimizing Donor Engagement Strategy



Fundraisers Want to Know...

What does my pipeline look like, and do I need to invest in an acquisition strategy?

What is the capacity of those in my pipeline?

How do I prioritize my pipeline, and help my team focus on the best prospects?

Case Study: Hospital Foundation

Business Challenge

- Prior to kicking off a new fundraising campaign, there needed to be a clear view of the pipeline
- The following questions needed to be answered:
 - Do we have enough in our pipeline to raise over \$150 million?
 - Programmatically do we have enough in each fundraising area?
 - Do we need to invest, and where? Acquisition? People? Is there a difference in giving by ethnic groups?
 - How do we layer financial data on top of the data we already have? (Demographics, Behaviours and Attitudes)

Insights We already knew

Demographics



Understanding key generational differences

Behaviours



Analyze existing patterns in online/offline engagement behaviours and preferences

Attitudes



Identifying motivational drivers that can impact messaging, imagery and call-to-action

Case Study: Hospital Foundation

Key Insights

- The pipeline was healthy and didn't require a big acquisition push
- There were lots of mid-level and major gift donor prospects flying under the radar
- The team was focusing on the wrong donor prospects and areas











Case Study: Results

Overall:

- Identified and ranked top Major Gift and Mid-Level prospects for Development team/officers
- Have subdivided the two fundraising groups into ethnic groupings that specific Development team/officers are responsible for.
- Can be tracked year over year and mapped to overall Fundraising Campaign
- Can adapt the rankings and align to funding area requests

DonorRank results

- MG Prospects: 110+ new identified
- Mid-Level Prospects: 300+ new identified



Thank you!

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