

Scoring and Finding your Best Donor Prospects

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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



More than
\$576 Billion
in inheritances have
been received by
Canadians

Inheritance Received by Province

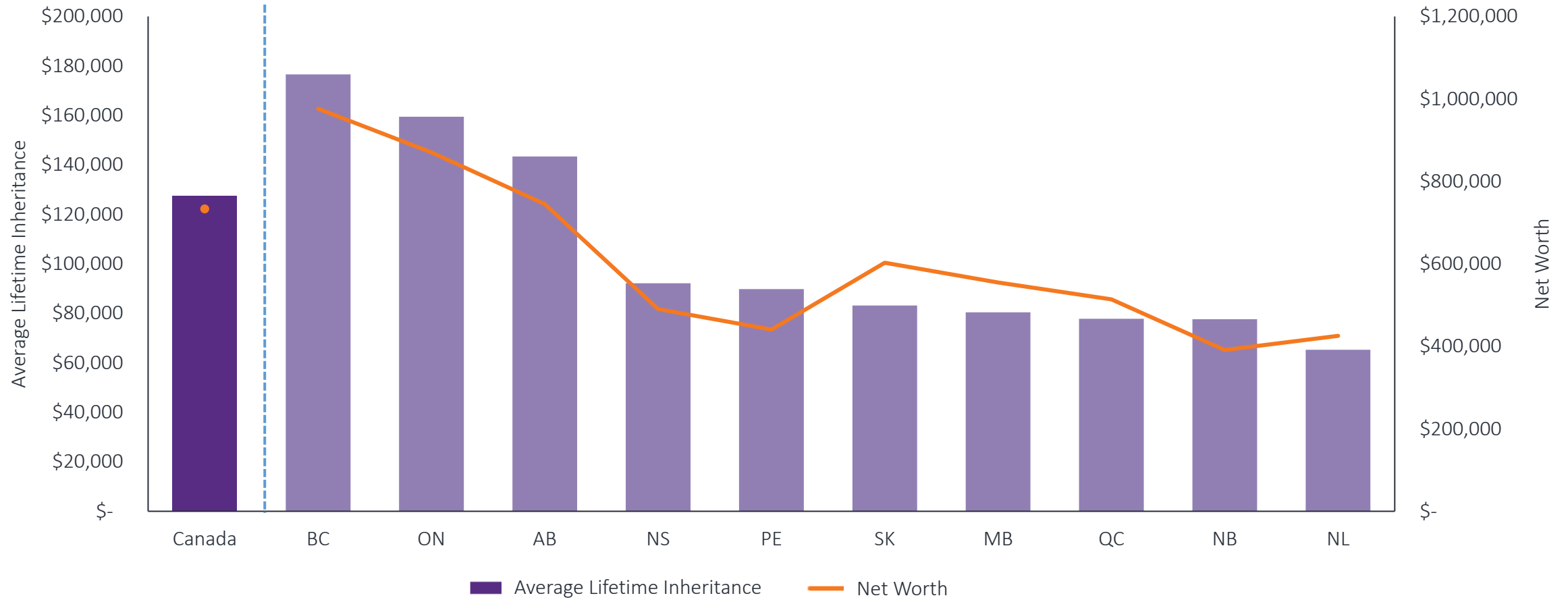
Average Lifetime Inheritance Received by Province



Source: Statistics Canada Survey of Financial Security

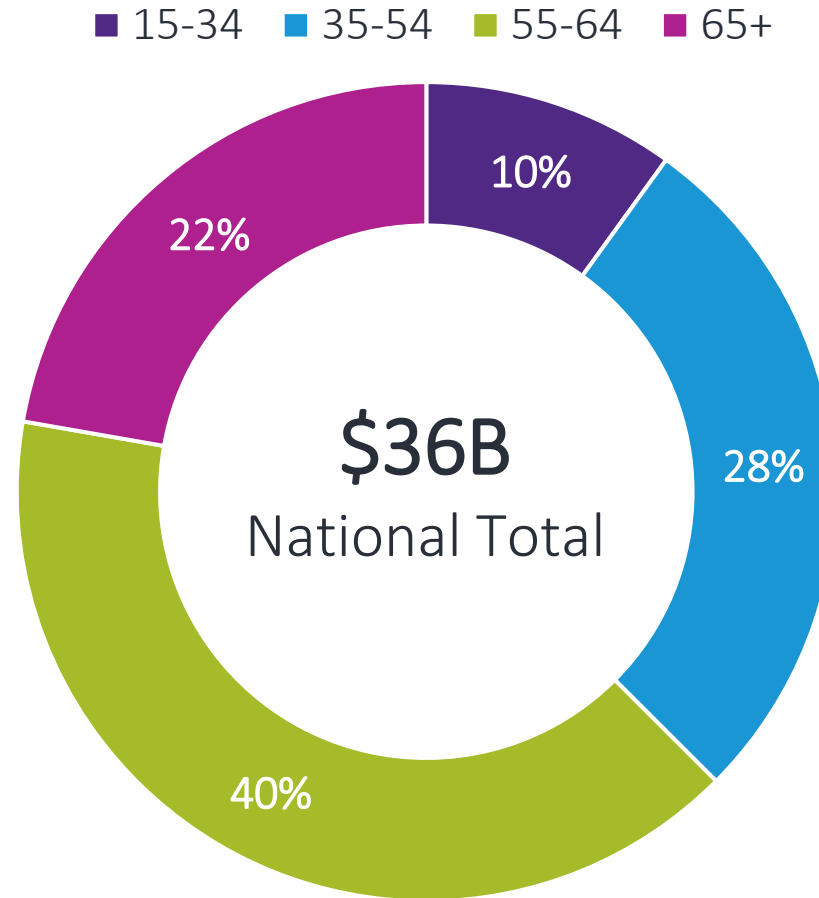
Inheritance Received and Net Worth

Average Lifetime Inheritance and Net Worth by Province

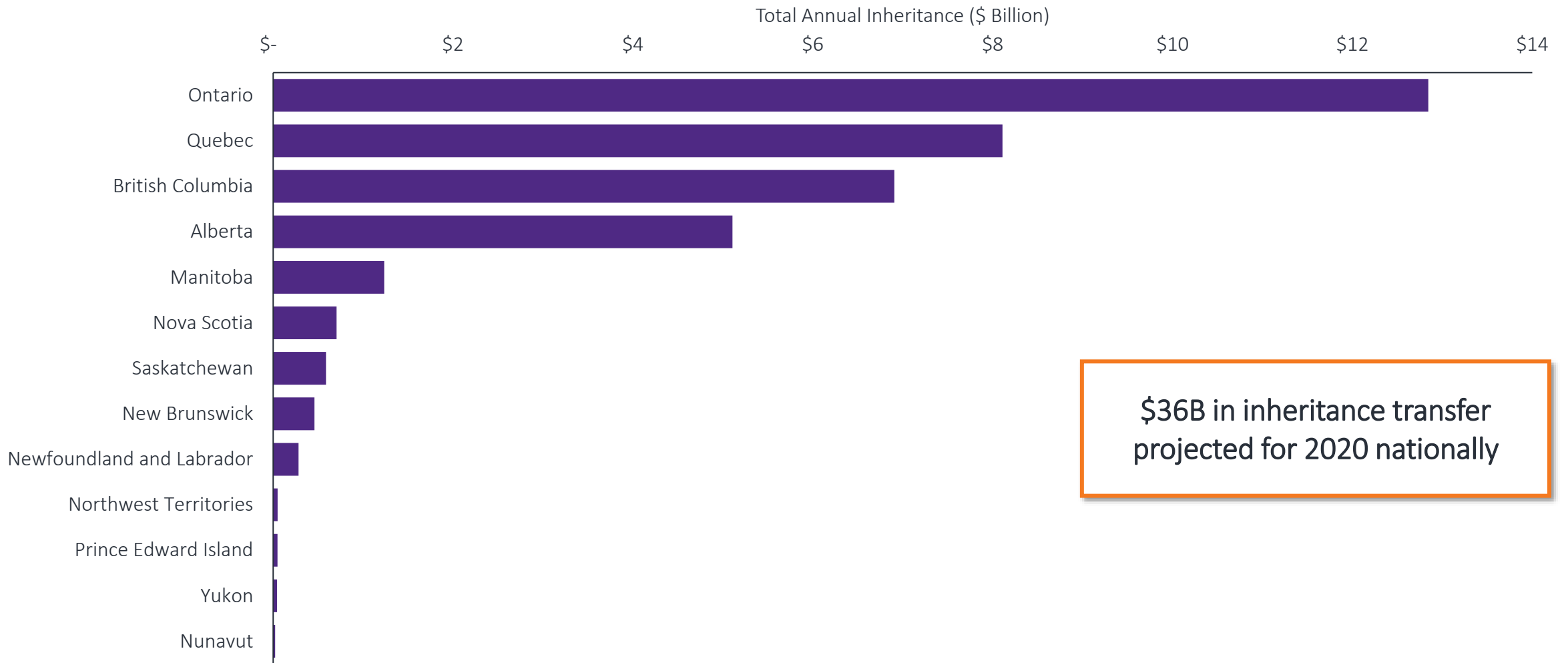


Source: Statistics Canada Survey of Financial Security, WealthScapes 2020

Inheritance Not Just for Older Generation



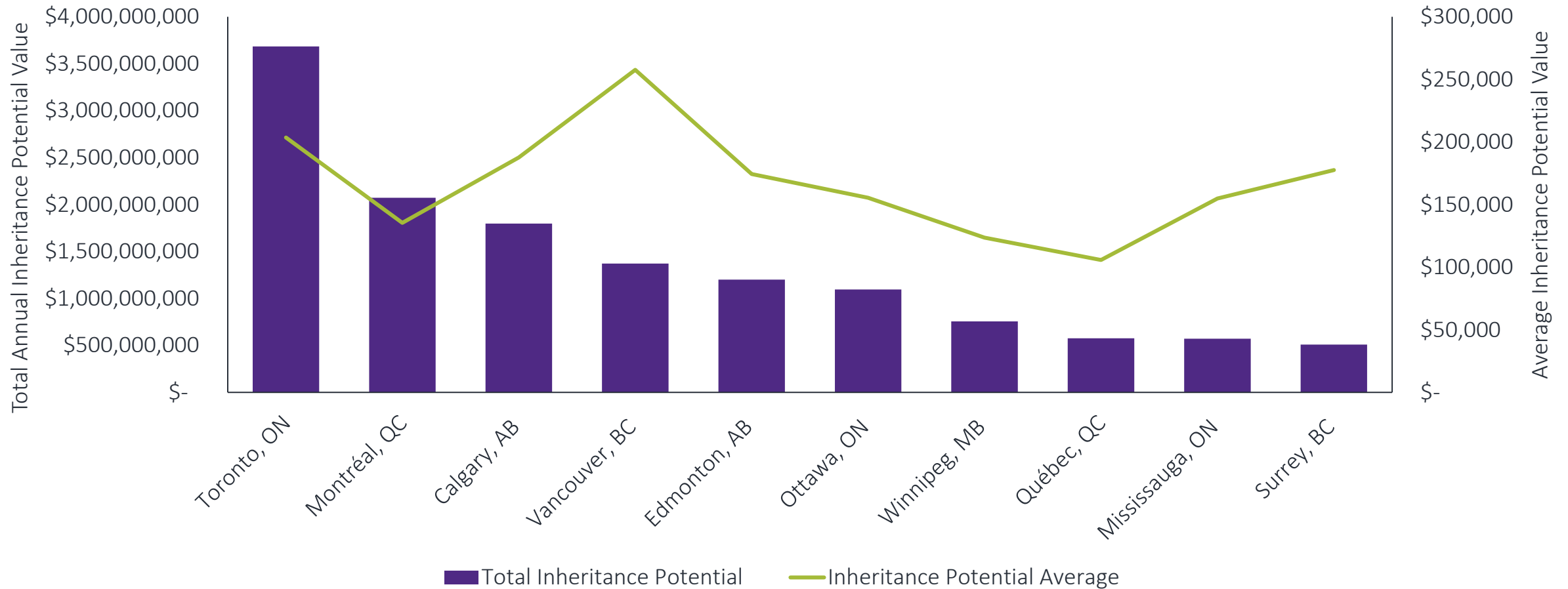
2020: Total Estimated Inheritance by Province



Source: WealthTransfer 2020

Not All Markets Expected to Behave the Same

Inheritance Potential by Top 10 Census Subdivisions



Key Trends



Aging population
and desire to **leave
a legacy** for family

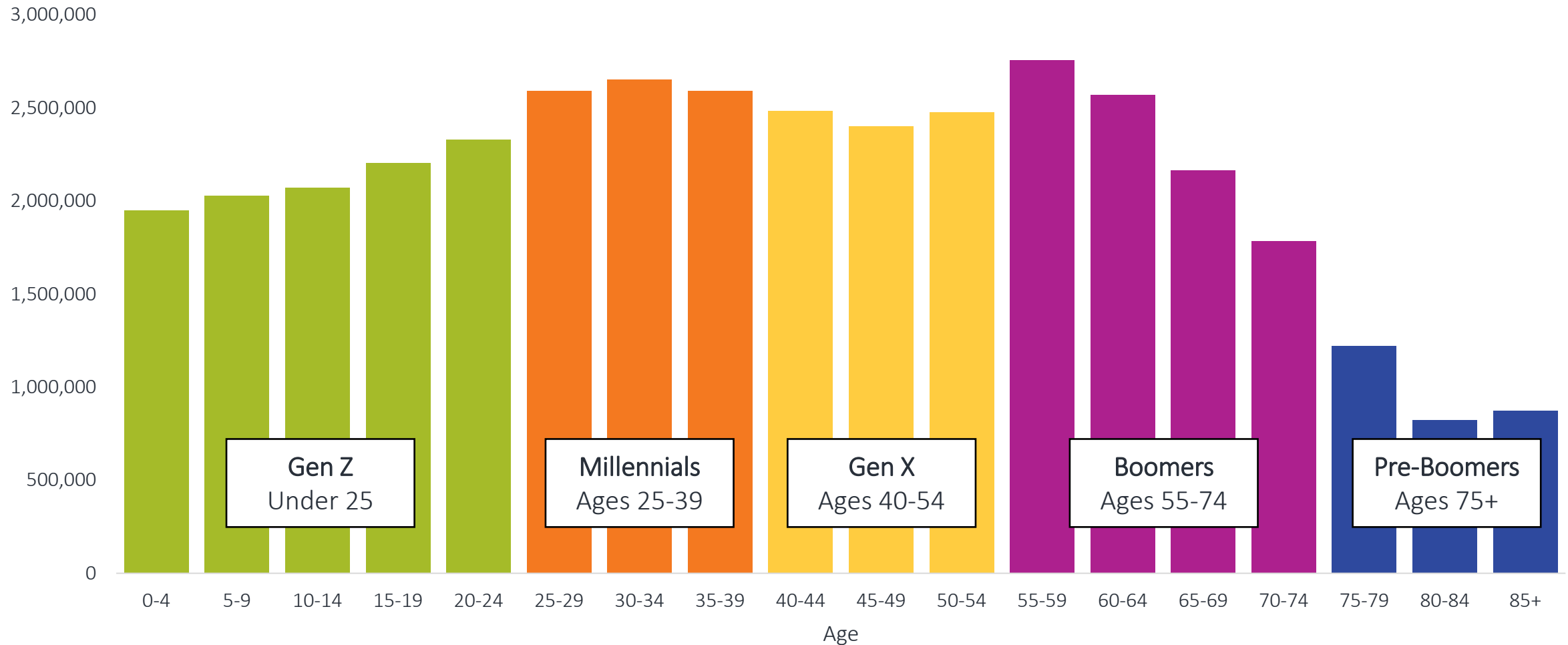


Largest impending
transfer of wealth
expected



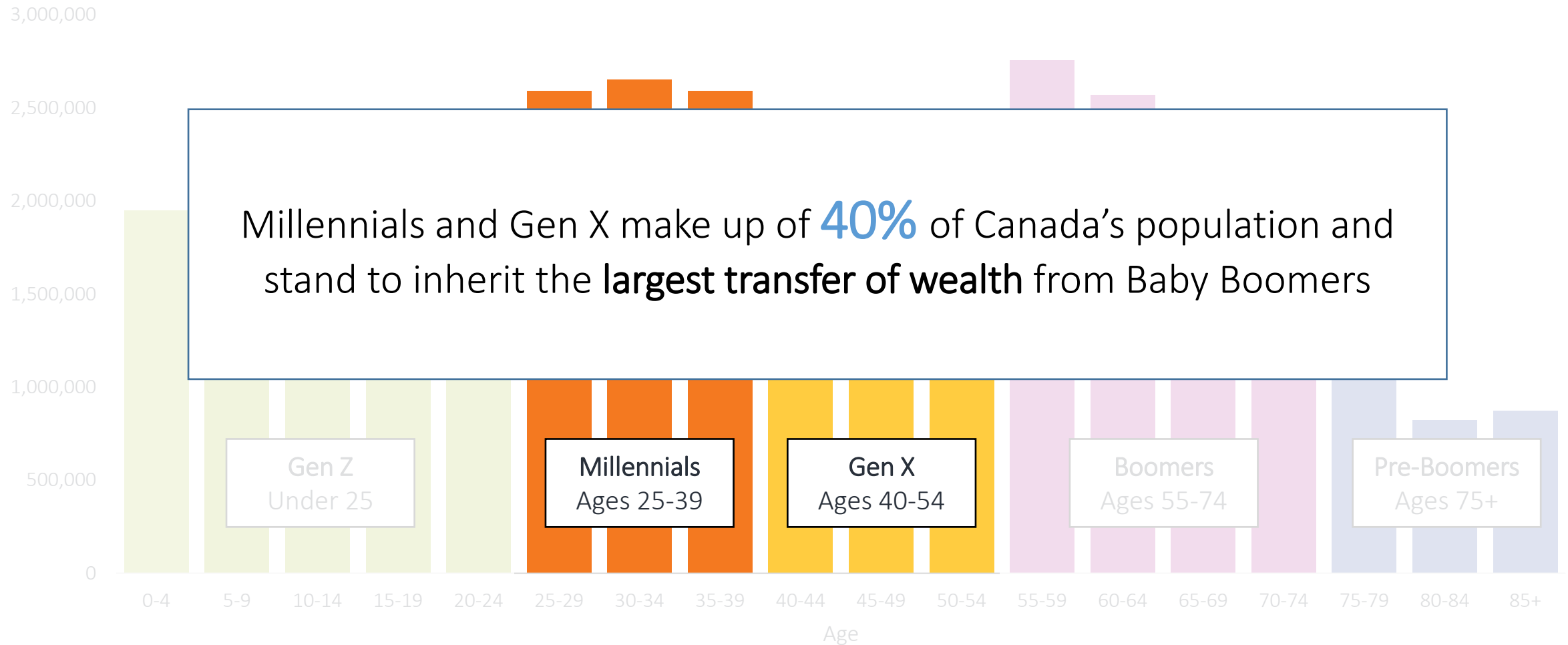
**Millennials are
different** from older
generation

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



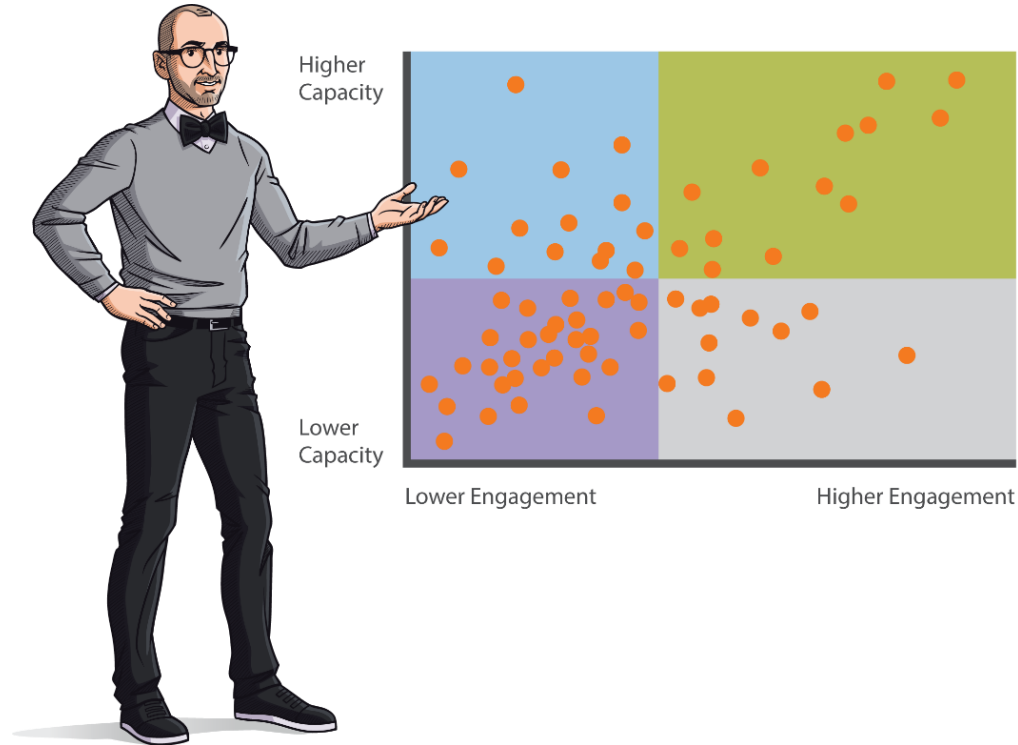
Prospect



Scoring



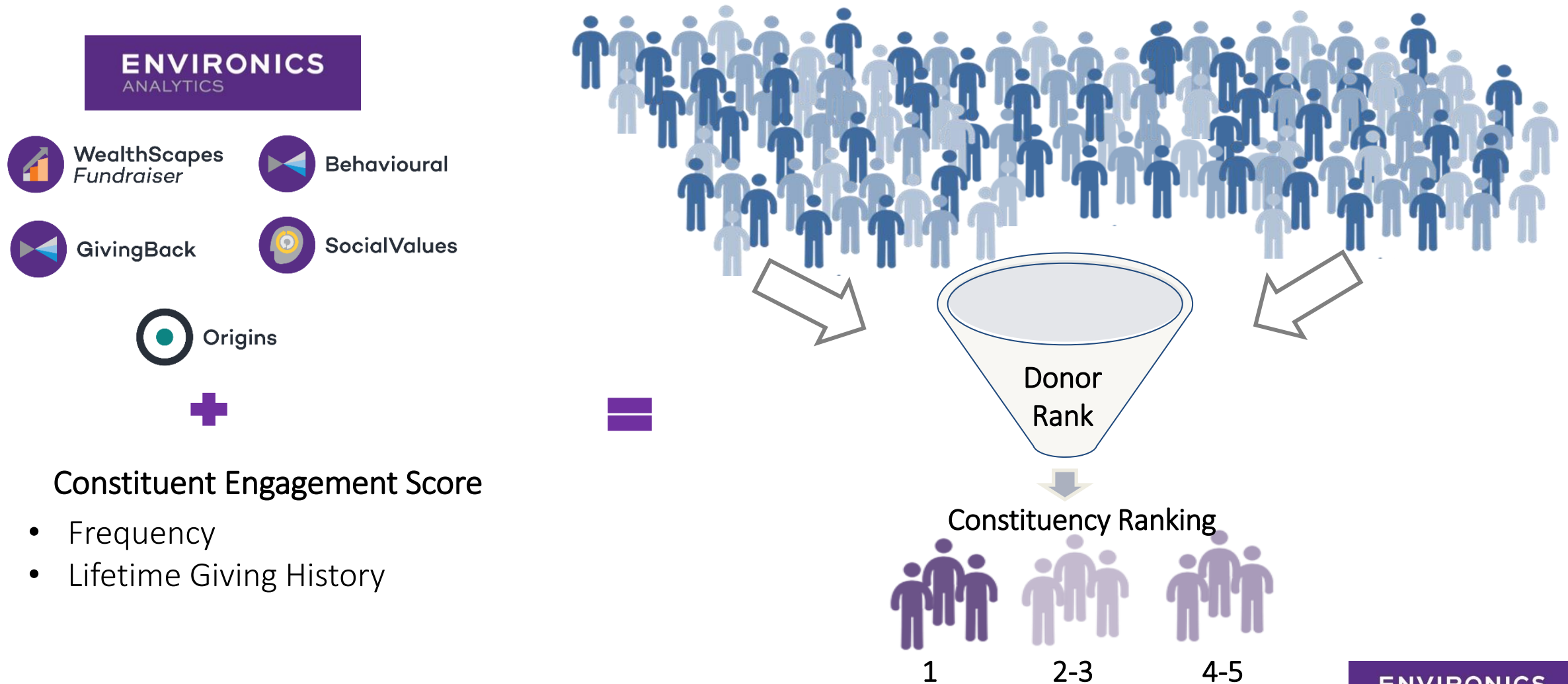
Capacity



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

Constituent Wealth Insights & Scoring

Optimizing Donor Engagement through EA's NEW DonorRank System



DonorRank - Scoring

[illegible]

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-digit 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 0B8	26 - Country Traditions	\$ 340	12
1004269	Callander	Ontario	POH 1H0	26 - Country Traditions	\$ 20,050	3
1007412	Buckhorn	Ontario	KOL 1J0	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	L0K 2A0	43 - Happy Medium	\$ 30	1
1002855	Minesing	Ontario	L0L 1Y0	26 - Country Traditions	\$ 655	31
1022658	Waterdown	Ontario	LOR 2H0	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

19

FAMILY MODE



S3 UPPER-MIDDLE
SUBURBIA

MIDDLE-AGE
FAMILIES **F3**

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?

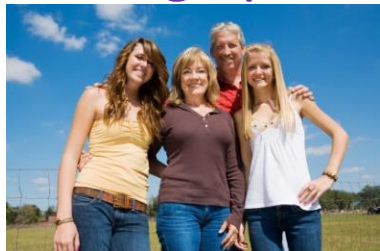
Case Study: Hospital Foundation

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)

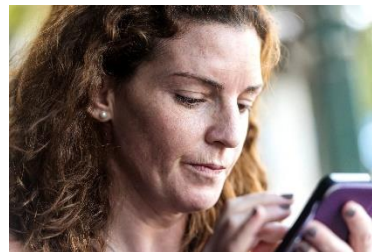
Insights We already knew

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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