



March 10, 2009

Presented by
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GG+A
Grenzebach
Glier and
Associates

Big 12 Development Conference

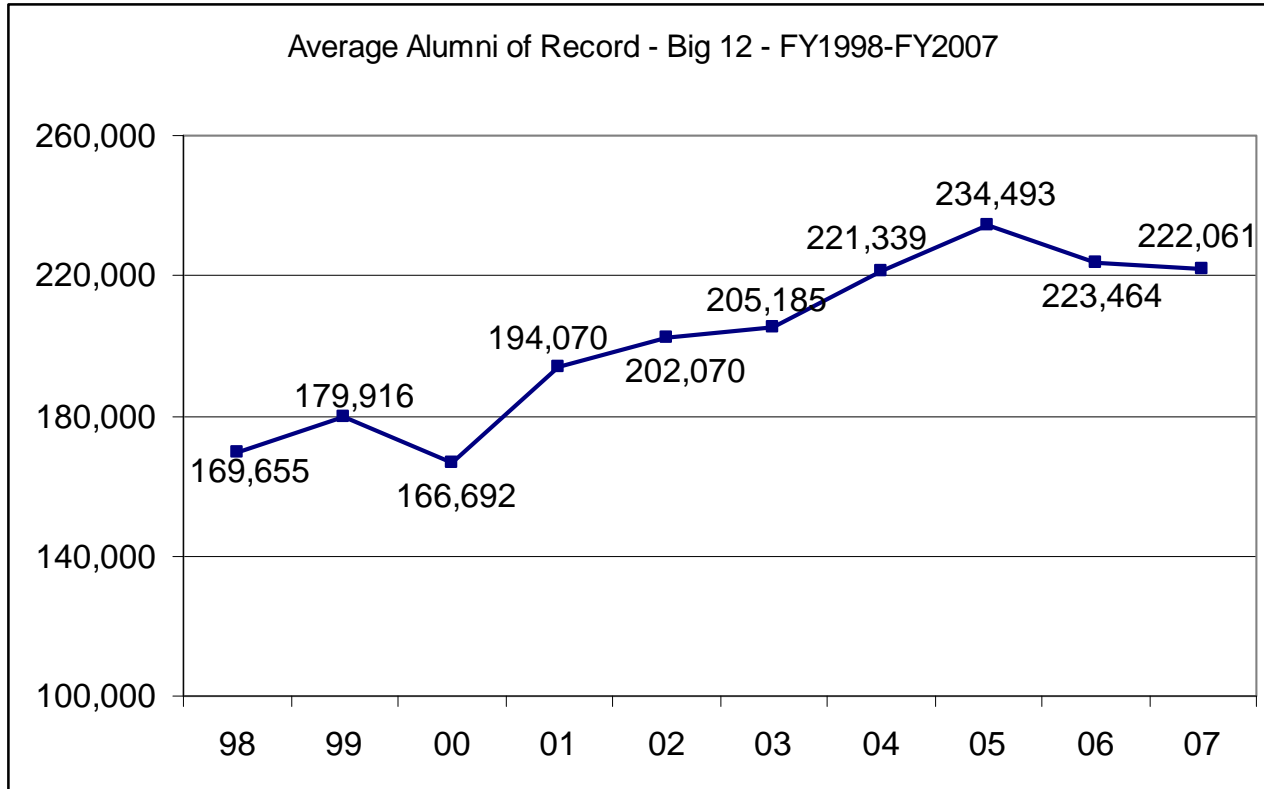
How Data Can Drive Your Fundraising

GG+A and Analytics

- The firm has a long history in data-driven consulting
- We were pioneers in prospect screening more than 20 years ago
- We have made significant investments in new technology that are changing the way development executives think about data and how to use it
- We are committed to using data analysis to improve fundraising results because we know how your development programs work



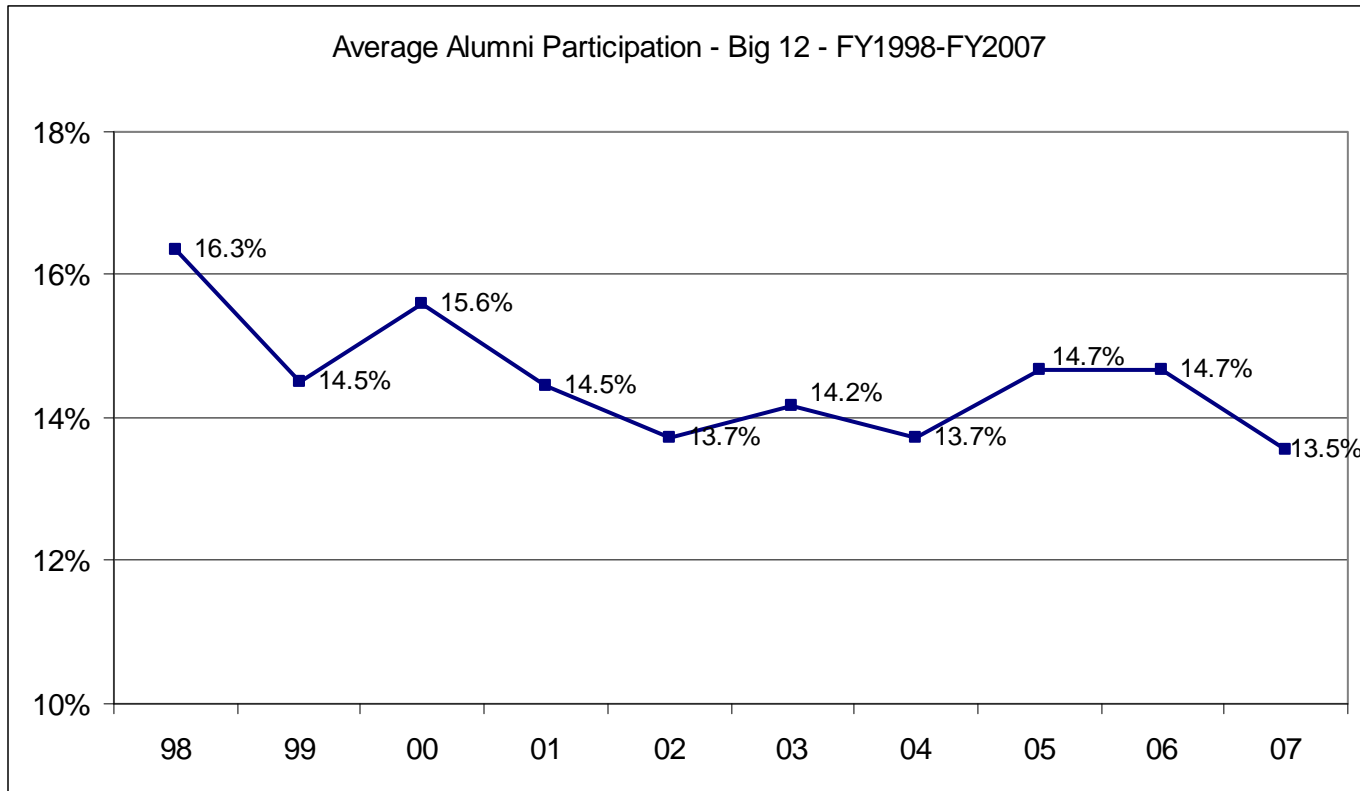
Big 12 Alumni of Record



Alumni of record for the 12 conference schools has grown 31% over the past 10 years



Big 12 Alumni Participation Rates



Alumni participation for the 12 conference schools has decreased 17% over the same period



Some Premises

- **Research is changing**
 - A shift from “the most” data to “the right” data
 - Getting information has never been easier
 - Making sense of it has never been more difficult
- **Campaigns are here to stay**
 - They are a marketing construct
 - They’re ever more data-driven

(Start over from the top)



Why Campaigns?

- They require and precipitate institutional focus
- They reshape and transform our views of institutional mission, and the role of private support
- They galvanize donor interest and commitment
- They raise sights
- They accelerate the cultivation/solicitation cycle
- They provide an urgent framework for the collaboration of institutional leaders, professional staff, and both internal and external volunteers



The Place For Analytics

- Analytics has value throughout the life of a campaign.
- Some key areas:
 - Pre-campaign planning and expectations
 - Prospect management and prioritization
 - Forecasting and donor prediction



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Pre-Campaign Planning

One Chief Executive's Activity Level in a Campaign

The University Campaign Development and Alumni Affairs Activities

	Individual prospect meetings	Small dinners/lunches	Events and large dinners	Domestic travel (days)	Foreign travel (days)	AA Events	Strategy meetings (hours)
FY2001	81	33	31	43	3	7	49
FY2002	56	18	35	26	0	3	30
FY2003	88	37	39	46	4	7	43
FY2004	75	31	40	36	8	8	34
FY2005	108	48	35	32	29	10	37
FY2006	82	32	41	38	0	6	25
TOTALS	490	199	221	221	44	41	218

Data from various sources can help to set expectations about activities and outcomes.



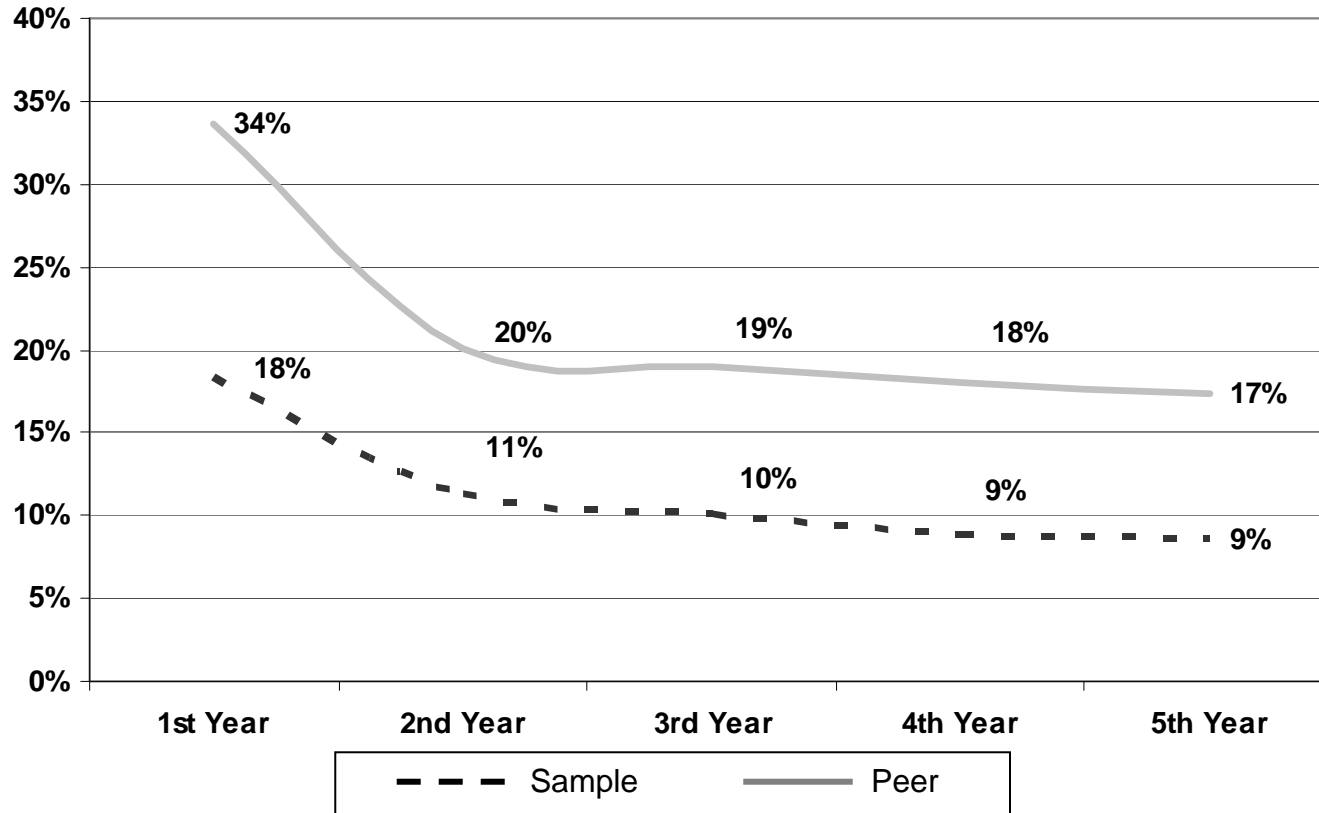
Benchmarking Applications: Fundraising Before, During and After the Campaign

Institution (Alumni of Record)	Average Annual Total Private Support BEFORE Campaign (3 Years)	Announce Date	Average Annual Total Private Support DURING Campaign (Variable Number of Years)	Change in TPS: From BEFORE to DURING the Campaign	End Date	Average Annual Total Private Support AFTER Campaign (3 Years)	Change in TPS: From DURING to AFTER the Campaign	Change in TPS: From BEFORE to AFTER the Campaign
Amherst (19,086)	\$14,866,650	1996	\$38,101,217	156.29%	2001	\$27,525,341	-27.76%	85.15%
Barnard (25,848)	\$8,722,303	1994	\$14,618,597	67.60%	2000	\$17,378,385	18.88%	99.24%
Bowdoin (18,002)	\$10,069,428	1995	\$27,392,747	172.04%	1998	\$36,564,455	33.48%	263.12%
Colby (22,842)	\$7,190,238	1994	\$19,256,907	167.82%	2000	\$13,661,685	-29.06%	90.00%
Davidson (21,315)	\$9,687,956	1989	\$15,009,881	54.93%	1995	\$18,646,156	24.23%	92.47%
Middlebury (23,857)	\$11,667,664	1997	\$25,138,846	115.46%	2002	\$33,213,443	32.12%	184.66%
Mount Holyoke (30,801)	\$8,183,468	1986	\$14,383,595	75.76%	1991	\$9,402,519	-34.63%	14.90%
Smith (47,644)	\$38,068,374	1999	\$47,658,275	25.19%	2004
Swarthmore (18,477)	\$16,971,186	2001	\$19,468,417	14.71%	2006
Vassar (30,400)	\$16,792,023	1993	\$26,618,635	58.52%	1996	\$28,229,836	6.05%	68.11%
Washington and Lee (23,255)	\$34,176,032	2001	\$32,756,781	-4.15%	2003	\$28,701,299	-12.38%	-16.02%
Wellesley	\$44,750,040	2000	\$53,403,487	19.34%	2001	\$55,416,078	3.77%	23.83%
Wesleyan (31,034)	\$7,980,838	2000	\$12,003,579	50.41%	2004
Williams (25,062)	\$14,759,157	1989	\$20,131,048	36.40%	1993	\$26,504,903	31.66%	79.58%
Mean	\$17,420,383		\$26,138,715	72.17%		\$26,840,373	4.22%	89.55%
Median	\$13,213,410		\$22,634,947	56.73%		\$27,525,341	6.05%	85.15%

Source: CAE



Benchmarking: New Donor Retention Analysis



The peer's new donor retention rates are consistently higher than the Sample Institution's each year

Retention rates for new donors acquired FY00-FY02; N (Sample) = 35,718; N (Peer) = 22,570



Setting Expectations: Modeling Growth Potential

University of California 10 Year Compound Annual Growth Rate (FY94-FY04) in Total Private Support: 9.2%

If we grow the University of California's average Total Private Support (FY02-04) of \$1.02 billion to match the following cohort group	Compound Annual Growth Rate	Total Private Support							
		FY04	FY05	FY06	FY07	FY08	FY09	FY10	FY11
Carnegie I Privates & Publics (FY94-FY04)	7.7%	\$999 M	\$1.10 B	\$1.18 B	\$1.27 B	\$1.37 B	\$1.48 B	\$1.59 B	\$1.71 B

If we grow the University of California's average Total Private Support (FY02-04) of \$1.02 billion at its current rate	Compound Annual Growth Rate	Total Private Support							
		FY04	FY05	FY06	FY07	FY08	FY09	FY10	FY11
University of California (FY94-04)	9.2%	\$999 M	\$1.11 B	\$1.22 B	\$1.33 B	\$1.45 B	\$1.58 B	\$1.73 B	\$1.89 B

To grow the University of California's average Total Private Support (FY02-04) of \$1.02 billion to \$2 billion over 7 years	Compound Annual Growth Rate	Total Private Support							
		FY04	FY05	FY06	FY07	FY08	FY09	FY10	FY11
	10.1%	\$999 M	\$1.12 B	\$1.24 B	\$1.36 B	\$1.50 B	\$1.65 B	\$1.82 B	\$2.00 B

Source: CAE

Note: CAE Total Private Support is the sum of outright gifts, which includes cash, gifts-in-kind, securities, real estate, and property, and deferred gifts. Deferred gifts have been counted at present value starting in FY02 and at face value for FY01 and earlier. It does not include pledges or bequest intentions.

Note: TPS for University of California FY94 was **\$415,015,710** and FY04 was **\$999,666,048**

Note: Average TPS FY02-04 for University of California was **\$1,019,452,886**

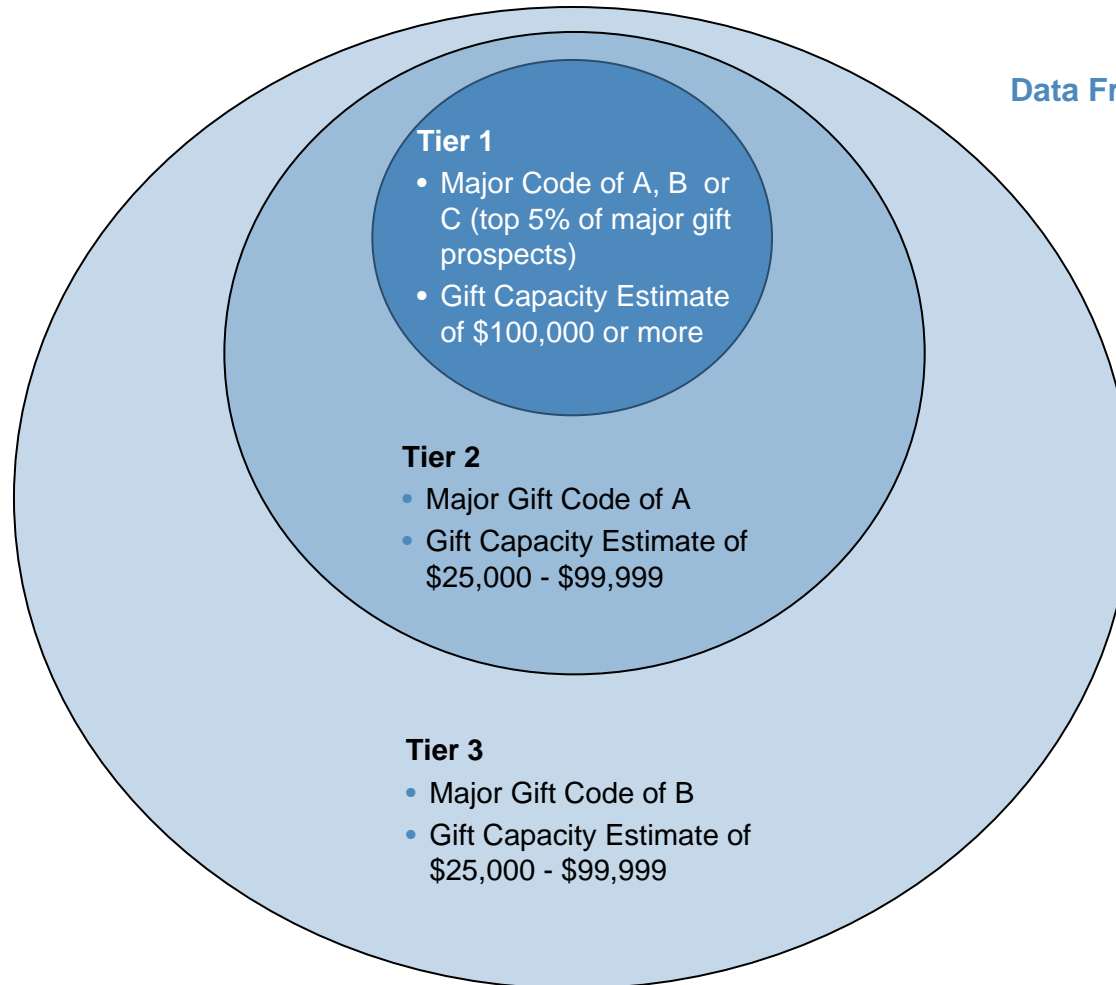


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Prospect Prioritization & Management

Prospect Pool Report: Assignment Tiers

Illustration Only:
Data From Current GG+A Client



Prospect Pool Report: Assigned Prospects

Illustration Only:
Data From Current GG+A Client

Assigned and Unassigned Prospects by Tier

GG+A Gift Capacity Rating	A	B	C	D	E	Total
\$10,000,000+ (1)	Assigned: 1,269 Unassigned: 898					41
\$1,000,000 - \$999,999 (2)						214
\$250,000 - \$999,999 (3)	Assigned: 6,318					428
\$100,000 - \$249,999 (4)						829
\$25,000 - \$99,999 (5)						3,213
\$10,000 - \$24,999 (6)						1,889
\$2,500 - \$9,999 (7)						652
Less than \$2,500 (8)						72
Unable to Rate (9)						2,514
Total	3,534	2,413	1,380	1,440	1,085	9,852

Assigned: 1,469
Unassigned: 1,327

Assigned: 796
Unassigned: 3,569



Contact Management by Major Gift Code

GG&A Major Gift Code	Group Activity	%	Mail	%	Personal Visit	%	Telephone (DO)	%	Unspecified	%	Total
A	147	4.8%	200	6.6%	830	27.2%	323	10.6%	69	2.3%	3,049
B	120	1.3%	175	1.9%	892	9.8%	261	2.9%	27	0.3%	9,147
C	124	0.7%	124	0.7%	681	3.7%	207	1.1%	42	0.2%	18,294
D	162	0.3%	167	0.3%	825	1.4%	234	0.4%	55	0.1%	60,982
E	304	0.1%	206	0.0%	1,337	0.3%	286	0.1%	92	0.0%	518,343
Total	857		872		4,565		1,311		285		609,815

47% of the personal visits since July of 2006 have been to D- and E-rated prospects



Major Gift Officer Portfolio Analysis sorted by Sum Portfolio Value Index

Major Gift Officer	Number of Prospects	Sum Adjusted Value	Sum Portfolio Value Index (100)	Average Adjusted Value	Average Prospect Value Index (100)	Major Gift Code A	Major Gift Code B	Major Gift Code C	Major Gift Code D	Major Gift Code E
A	162	\$64,907,242	774	\$400,662	990	83	39	18	12	10
B	285	\$55,565,245	663	\$194,966	482	144	71	24	20	26
C	98	\$33,763,809	403	\$344,529	851	56	22	4	7	9
D	766	\$24,279,030	290	\$31,696	78	189	476	79	6	16
E	735	\$23,105,109	276	\$31,436	78	138	232	154	107	104
F	274	\$22,031,532	263	\$80,407	199	105	86	26	23	34
G	431	\$21,399,162	255	\$49,650	123	84	147	98	53	49
H	242	\$20,546,292	245	\$84,902	210	68	63	45	29	37
I	230	\$18,602,260	222	\$80,879	200	64	105	23	19	19
J	931	\$17,131,517	204	\$18,401	45	140	372	203	120	96
K	715	\$16,884,031	201	\$23,614	58	98	224	218	132	43
L	983	\$15,842,077	189	\$16,116	40	110	238	185	218	232
M	752	\$14,081,460	168	\$18,725	46	108	301	153	103	87
N	582	\$13,596,583	162	\$23,362	58	83	244	108	70	77
O	236	\$13,245,431	158	\$56,125	139	63	67	27	28	51
P	515	\$12,903,096	154	\$25,055	62	123	109	97	78	108
Q	454	\$11,809,094	141	\$26,011	64	107	120	104	69	54
R	59	\$10,080,553	120	\$170,857	422	23	18	4	6	8
U	458	\$8,860,530	106	\$19,346	48	36	113	139	91	79
V	408	\$8,559,708	102	\$20,980	52	71	157	90	55	35
W	542	\$7,357,537	88	\$13,575	34	48	141	124	100	129
X	449	\$7,197,038	86	\$16,029	40	36	137	136	90	50
Y	622	\$6,889,955	82	\$11,077	27	43	135	178	112	154
Z	452	\$6,060,734	72	\$13,409	33	20	136	168	89	39
AA	68	\$5,475,085	65	\$80,516	199	12	18	15	9	14
AB	361	\$5,466,011	65	\$15,141	37	33	56	60	85	127
AC	56	\$5,384,406	64	\$96,150	238	22	7	11	2	14
AD	375	\$5,320,995	63	\$14,189	35	35	69	96	95	80
AE	171	\$5,139,608	61	\$30,056	74	30	26	48	26	41
AF	394	\$4,754,016	57	\$12,066	30	18	35	62	106	173
AG	255	\$4,208,383	50	\$16,503	41	14	62	52	51	76
AH	211	\$4,154,152	50	\$19,688	49	33	81	45	16	33
AI	340	\$3,553,001	42	\$10,450	26	14	76	104	91	55



Major Gift Officer Portfolio Analysis sorted by Sum Portfolio Value Index

Major Gift Officer	Number of Prospects	Sum Adjusted Value	Sum Portfolio Value Index (100)	Average Adjusted Value	Average Prospect Value Index (100)	Major Gift Code A	Major Gift Code B	Major Gift Code C	Major Gift Code D	Major Gift Code E
AJ	293	\$3,392,510	40	\$11,579	29	16	37	53	100	87
AK	176	\$3,160,315	38	\$17,956	44	16	47	56	28	29
AL	80	\$2,802,951	33	\$35,037	87	25	23	12	7	13
AM	240	\$2,553,462	30	\$10,639	26	4	83	74	50	29
AN	167	\$2,481,855	30	\$14,861	37	5	54	72	31	5
AO	173	\$2,325,335	28	\$13,441	33	14	53	40	24	42
AP	261	\$2,175,240	26	\$8,334	21	8	27	42	86	98
AQ	76	\$2,116,423	25	\$27,848	69	16	42	14	2	2
AR	94	\$1,970,863	24	\$20,967	52	7	32	32	4	19
AS	54	\$1,794,836	21	\$33,238	82	11	11	9	7	16
AT	86	\$1,702,801	20	\$19,800	49	7	12	27	21	19
AU	159	\$1,593,433	19	\$10,022	25	2	29	49	63	16
AV	40	\$1,580,298	19	\$39,507	98	12	4	4	4	16
AW	63	\$1,448,712	17	\$22,995	57	11	25	1	17	9
AX	44	\$1,426,032	17	\$32,410	80	7	19	12	0	6
AY	108	\$1,412,314	17	\$13,077	32	6	31	26	21	24
AZ	162	\$1,201,331	14	\$7,416	18	3	17	40	33	69
BA	56	\$989,854	12	\$17,676	44	6	24	18	2	6
BB	19	\$608,494	7	\$32,026	79	3	7	4	2	3
BC	71	\$529,178	6	\$7,453	18	1	5	9	10	46
BD	16	\$331,248	4	\$20,703	51	3	0	5	3	5
BE	23	\$234,997	3	\$10,217	25	0	5	8	8	2
BF	4	\$210,000	3	\$52,500	130	2	0	2	0	0
BG	90	\$142,983	2	\$1,589	4	0	0	4	28	58
BH	14	\$104,305	1	\$7,450	18	0	5	2	3	4
BI	54	\$82,168	1	\$1,522	4	0	0	7	8	39
BJ	5	\$75,000	1	\$15,000	37	1	2	0	2	0
BK	25	\$52,176	1	\$2,087	5	0	0	1	10	14
BL	4	\$37,500	0	\$9,375	23	0	0	3	0	1
BM	1	\$6,250	0	\$6,250	15	0	0	0	1	0
BN	1	\$0	-	\$0	-	0	0	0	0	1
Average	254	\$8,385,899	100	\$40,462	100	38	75	55	42	44
Total	16,271	\$536,697,547	100	\$32,985	100	2,437	4,777	3,524	2,696	2,837

Major Gift Officer Portfolio Analysis sorted by Average Prospect Value Index

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C	98	\$33,763,809	403	\$344,529	851	56	22	4	7	9
B	285	\$55,565,245	663	\$194,966	482	144	71	24	20	26
R	59	\$10,080,553	120	\$170,857	422	23	18	4	6	8
AC	56	\$5,384,406	64	\$96,150	238	22	7	11	2	14
H	242	\$20,546,292	245	\$84,902	210	68	63	45	29	37
I	230	\$18,602,260	222	\$80,879	200	64	105	23	19	19
AA	68	\$5,475,085	65	\$80,516	199	12	18	15	9	14
F	274	\$22,031,532	263	\$80,407	199	105	86	26	23	34
O	236	\$13,245,431	158	\$56,125	139	63	67	27	28	51
BF	4	\$210,000	3	\$52,500	130	2	0	2	0	0
G	431	\$21,399,162	255	\$49,650	123	84	147	98	53	49
AV	40	\$1,580,298	19	\$39,507	98	12	4	4	4	16
AL	80	\$2,802,951	33	\$35,037	87	25	23	12	7	13
AS	54	\$1,794,836	21	\$33,238	82	11	11	9	7	16
AX	44	\$1,426,032	17	\$32,410	80	7	19	12	0	6
BB	19	\$608,494	7	\$32,026	79	3	7	4	2	3
D	766	\$24,279,030	290	\$31,696	78	189	476	79	6	16
E	735	\$23,105,109	276	\$31,436	78	138	232	154	107	104
AE	171	\$5,139,608	61	\$30,056	74	30	26	48	26	41
AQ	76	\$2,116,423	25	\$27,848	69	16	42	14	2	2
Q	454	\$11,809,094	141	\$26,011	64	107	120	104	69	54
P	515	\$12,903,096	154	\$25,055	62	123	109	97	78	108
K	715	\$16,884,031	201	\$23,614	58	98	224	218	132	43
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AW	63	\$1,448,712	17	\$22,995	57	11	25	1	17	9
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AR	94	\$1,970,863	24	\$20,967	52	7	32	32	4	19
BD	16	\$331,248	4	\$20,703	51	3	0	5	3	5
AT	86	\$1,702,801	20	\$19,800	49	7	12	27	21	19
AH	211	\$4,154,152	50	\$19,688	49	33	81	45	19	33
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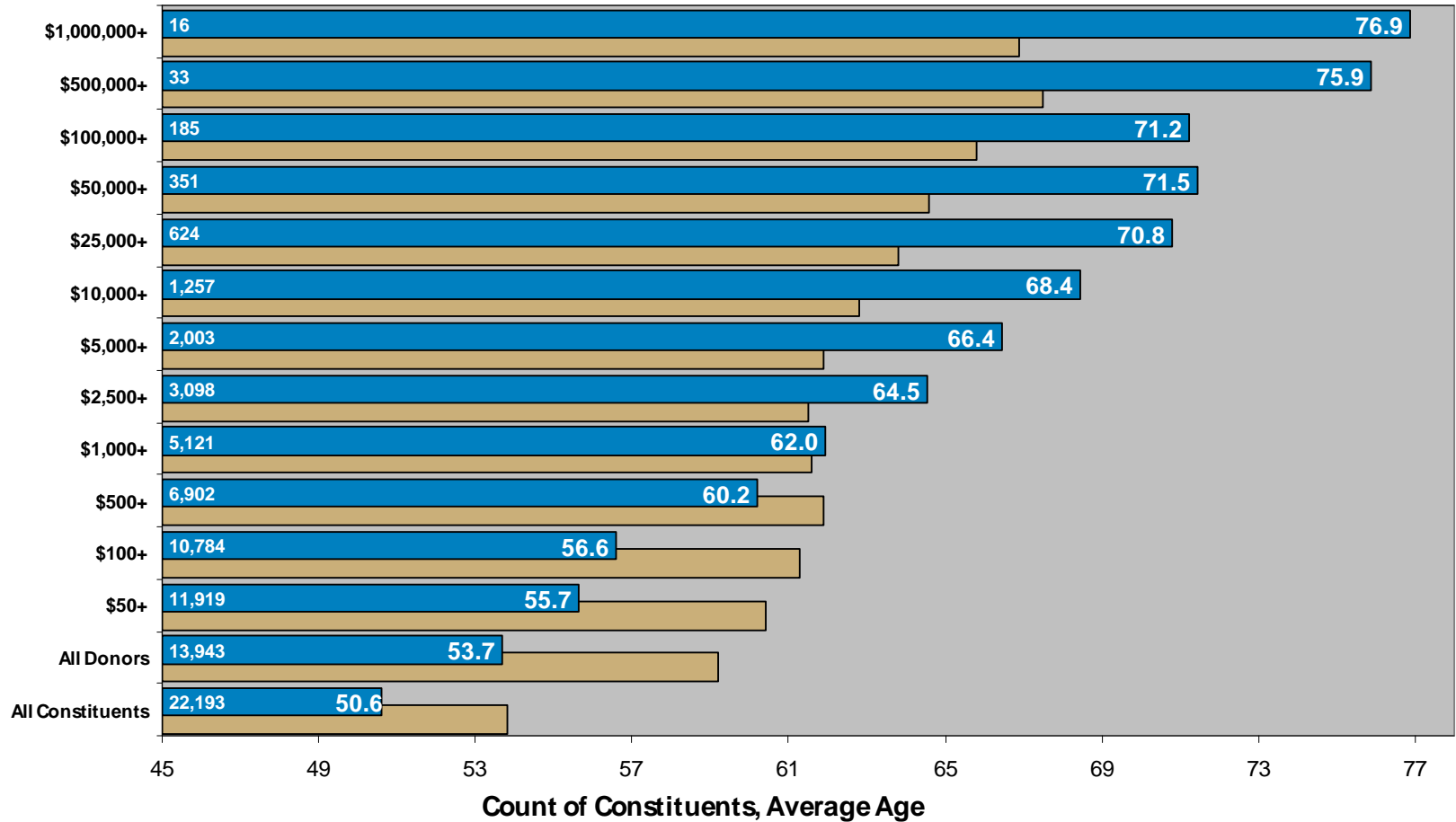


Major Gift Officer Portfolio Analysis sorted by Average Prospect Value Index

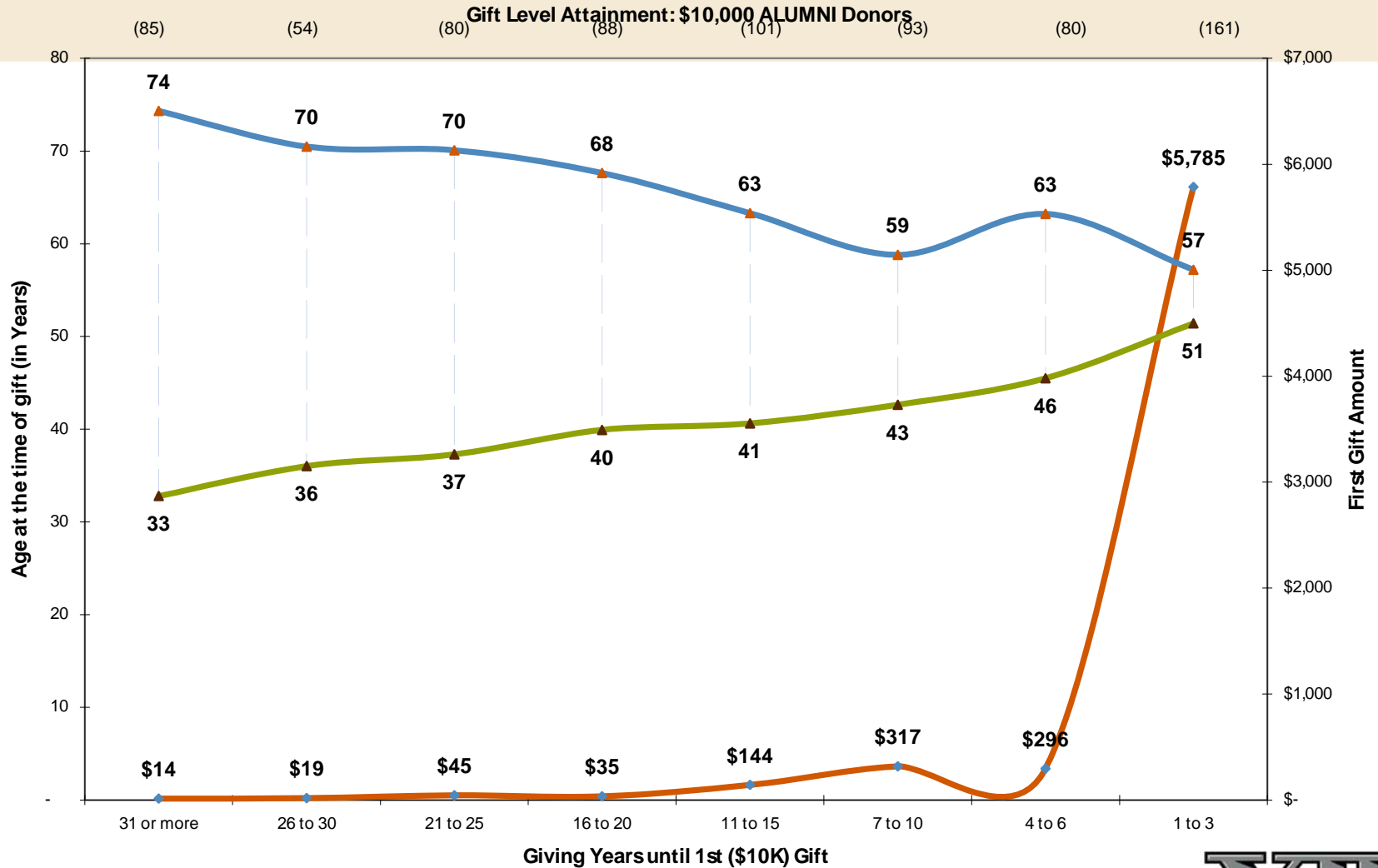
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AK	176	\$3,160,315	38	\$17,956	44	16	47	56	28	29
BA	56	\$989,854	12	\$17,676	44	6	24	18	2	6
AG	255	\$4,208,383	50	\$16,503	41	14	62	52	51	76
L	983	\$15,842,077	189	\$16,116	40	110	238	185	218	232
X	449	\$7,197,038	86	\$16,029	40	36	137	136	90	50
AB	361	\$5,466,011	65	\$15,141	37	33	56	60	85	127
BJ	5	\$75,000	1	\$15,000	37	1	2	0	2	0
AN	167	\$2,481,855	30	\$14,861	37	5	54	72	31	5
AD	375	\$5,320,995	63	\$14,189	35	35	69	96	95	80
W	542	\$7,357,537	88	\$13,575	34	48	141	124	100	129
AO	173	\$2,325,335	28	\$13,441	33	14	53	40	24	42
Z	452	\$6,060,734	72	\$13,409	33	20	136	168	89	39
AY	108	\$1,412,314	17	\$13,077	32	6	31	26	21	24
AF	394	\$4,754,016	57	\$12,066	30	18	35	62	106	173
AJ	293	\$3,392,510	40	\$11,579	29	16	37	53	100	87
Y	622	\$6,889,955	82	\$11,077	27	43	135	178	112	154
AM	240	\$2,553,462	30	\$10,639	26	4	83	74	50	29
AI	340	\$3,553,001	42	\$10,450	26	14	76	104	91	55
BE	23	\$234,997	3	\$10,217	25	0	5	8	8	2
AU	159	\$1,593,433	19	\$10,022	25	2	29	49	63	16
BL	4	\$37,500	0	\$9,375	23	0	0	3	0	1
AP	261	\$2,175,240	26	\$8,334	21	8	27	42	86	98
BC	71	\$529,178	6	\$7,453	18	1	5	9	10	46
BH	14	\$104,305	1	\$7,450	18	0	5	2	3	4
AZ	162	\$1,201,331	14	\$7,416	18	3	17	40	33	69
BM	1	\$6,250	0	\$6,250	15	0	0	0	1	0
BK	25	\$52,176	1	\$2,087	5	0	0	1	10	14
BG	90	\$142,983	2	\$1,589	4	0	0	4	28	58
BI	54	\$82,168	1	\$1,522	4	0	0	7	8	39
BN	1	\$0	-	\$0	-	0	0	0	0	1
Average	254	\$8,385,899	100	\$40,462	100	38	75	55	42	44
Total	16,271	\$536,697,547	100	\$32,985	100	2,437	4,777	3,524	2,696	2,837

Segmenting by Age

Average Donor Age by Cumulative Lifetime Giving - Institution and GG+A Benchmark



Gift Level Attainment: 1st time \$10,000 ALUMNI Donors



Alumni incl. deceased.
 Page 22 Hard Credits.

—◆— Average size of 1st Gift
 —▲— Age at 1st (\$10K) Gift
 —▲— Age at 1st Gift



DonorScape Identification: The Claritas PRIZM_{NE} System

- Claritas is a national marketing research firm, that has classified thousands of actual, addressable, and mappable neighborhoods into 66 lifestyle "segments," each a distinct marketplace group.
- These segments have been developed and refined repeatedly over the last three decades.
- The PRIZM system provides a highly accurate measure of socioeconomic standing, philanthropic tendency, and lifestyle indicators.
- The Claritas system is used by national firms in marketing, financial services, and retailing to market their services to American consumers.



PRIZM is Used Widely for Big Decisions In the Private and Non-Profit Sectors



Used PRIZM to develop its predictive model of store performance and site location



Used PRIZM for market and sales performance analysis; drove higher U.S. sales among target audiences



Used PRIZM to drive marketing segmentation and communication

Segmentation by PRIZM: Total Giving Potential

PrizmClusterCode	Count	TotalGiving	AvgTotalGivingDollars	Index
1	865,848	\$3,822,113,213	\$4,414	251
7	594,778	\$2,150,057,266	\$3,615	206
9	614,842	\$2,079,750,043	\$3,383	193
2	500,244	\$1,457,001,275	\$2,913	166
10	320,920	\$866,807,207	\$2,701	154
3	529,994	\$1,383,716,707	\$2,611	149
4	309,530	\$803,664,564	\$2,596	148
49	99,748	\$215,770,364	\$2,163	123
14	336,905	\$695,476,616	\$2,064	117
11	376,468	\$660,642,995	\$1,755	100
48	92,360	\$161,794,804	\$1,752	100
5	627,012	\$1,074,176,969	\$1,713	98
16	203,558	\$335,719,720	\$1,649	94
13	294,412	\$464,109,455	\$1,576	90
8	183,976	\$286,909,492	\$1,559	89
28	375,479	\$579,139,999	\$1,542	88
23	173,090	\$261,748,213	\$1,512	86
55	111,739	\$168,116,689	\$1,505	86
26	185,272	\$256,886,822	\$1,387	79
21	197,765	\$264,990,543	\$1,340	76
46	65,035	\$82,306,233	\$1,266	72
59	58,654	\$72,249,287	\$1,232	70
53	46,813	\$55,784,411	\$1,192	68
6	325,422	\$369,048,359	\$1,134	66



Key Findings

Grenzebach Cyber and Associates

Top 20 PRIZM Segments by Recent Giving Performance (Largest Giving Year in Last 5)

PRIZM Segment #	PRIZM Segment Nickname	# Donors, Last 5 years	Gifts over \$100		Gifts over \$500		Gifts over \$1,000	
			#	% 5 Yr Donors	#	% 5 Yr Donors	#	% 5 Yr Donors
38	Simple Pleasures	106	79	74.5%	35	33.0%	26	24.5%
14	New Empty Nests	278	199	71.6%	88	31.7%	67	24.1%
7	Money & Brains	1,180	890	75.4%	426	36.1%	282	23.9%
1	Upper Crust	916	687	75.0%	318	34.7%	216	23.6%
9	Big Fish, Small Pond	498	363	72.9%	168	33.7%	109	21.9%
3	Movers & Shakers	613	460	75.0%	185	30.2%	120	19.6%
28	Traditional Times	255	178	69.8%	72	28.2%	48	18.8%
26	The Cosmopolitans	177	124	70.1%	44	24.9%	33	18.6%
5	Country Squires	411	278	67.6%	103	25.1%	68	16.5%
4	Young Digerati	525	366	69.7%	147	28.0%	86	16.4%
2	Blue Blood Estates	447	303	67.8%	123	27.5%	73	16.3%
10	Second City Elite	260	185	71.2%	65	25.0%	38	14.6%
13	Upward Bound	167	112	67.1%	42	25.1%	23	13.8%
21	Gray Power	146	89	61.0%	29	19.9%	20	13.7%
11	God's Country	293	206	70.3%	72	24.6%	39	13.3%
6	Winner's Circle	216	151	69.9%	56	25.9%	28	13.0%
23	Greenbelt Sports	120	81	67.5%	25	20.8%	15	12.5%
12	Brite Lites, Lil' City	200	118	59.0%	35	17.5%	24	12.0%
27	Middleburg Managers	150	94	62.7%	35	23.3%	16	10.7%
16	Bohemian Mix	445	257	57.8%	81	18.2%	46	10.3%

Grenzebach Glier and Associates

Historical Data – Using it to Predict the Future

Gift Realization Provides a Clear View of Performance

Unit	# All	# Best PRIZM	% Best PRIZM	Best PRIZM		
				# & % Donors FY 02 - FY 06	Avg Cumulative Giving Per Donor	Cumulative Giving FY 02 - FY 06
All Alumni	321,196	131,006	40.8%	12,070 9.2%	\$6,498	\$78,431,519
IFAS	20,740	6,118	29.5%	527 8.6%	\$5,735	\$3,022,135
Arts & Sciences	17,837	9,340	52.4%	1,136 12.2%	\$10,381	\$11,793,050
Business Administration	44,969	19,689	43.8%	2,253 11.4%	\$12,968	\$29,217,348
Education	24,707	11,059	44.8%	1,114 10.1%	\$1,970	\$2,195,109
Engineering	36,901	15,691	42.5%	1,489 9.5%	\$3,496	\$5,204,884
Health & Human Performance	8,654	2,620	30.3%	117 4.5%	\$1,686	\$197,314
Journalism & Communications	23,470	9,697	41.3%	899 9.3%	\$4,927	\$4,429,821
Liberal Arts & Sciences	63,874	22,256	34.8%	1,233 5.5%	\$5,187	\$6,395,338
Law	11,135	5,281	47.4%	577 10.9%	\$6,334	\$3,654,498
Nursing	7,345	3,270	44.5%	278 8.5%	\$1,053	\$292,845

Education and Engineering have significant participation rates, but significant room for improvement in giving per benefactor



Predicting Outcomes

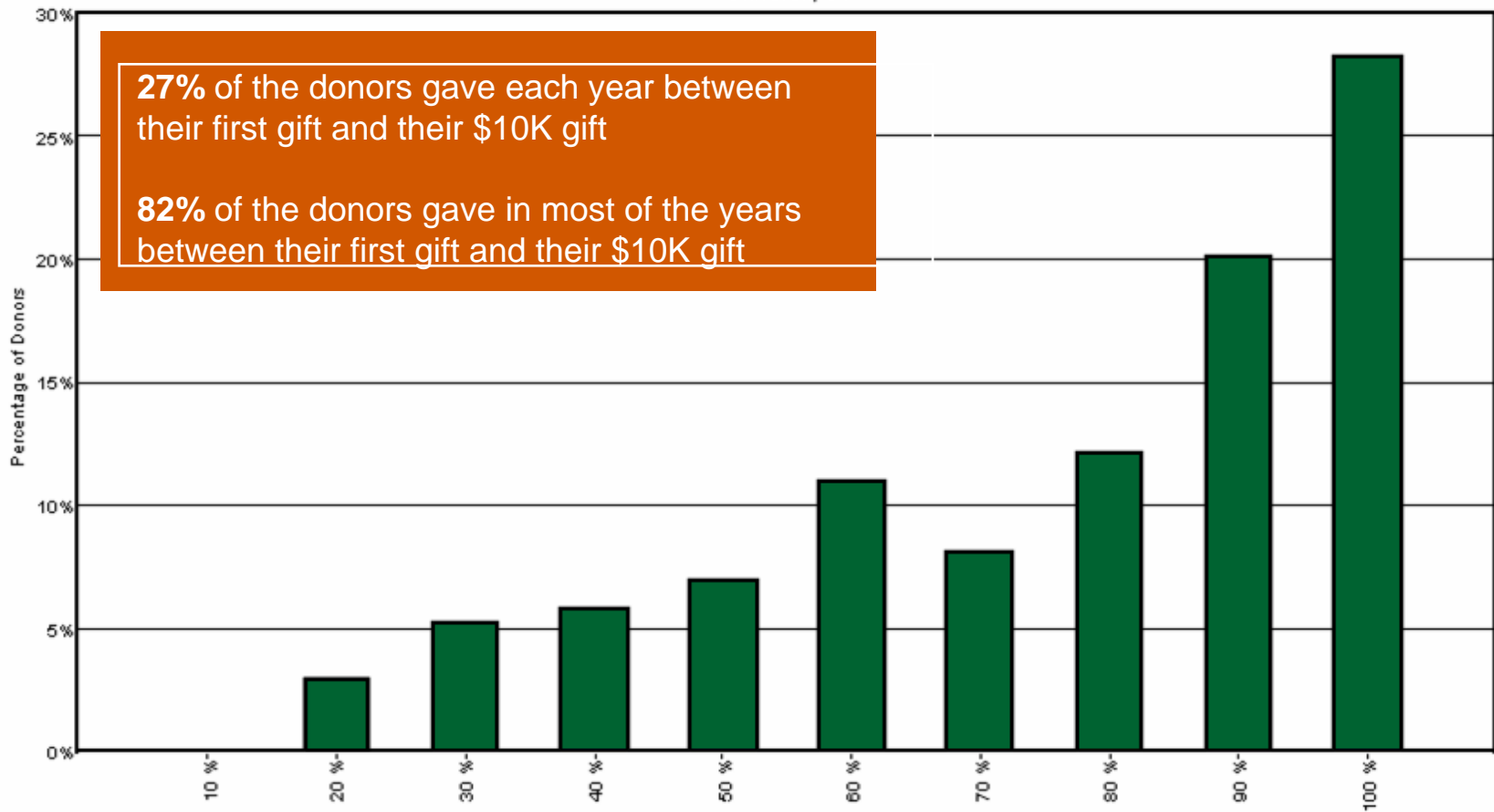
- Using the GG+A Annual Giving Rating and assuming that 10% of underperforming constituents upgrade future gifts, the school can expect an additional \$10,677,687 net revenue in annual gifts.
- If 25% of the pool upgraded, new gift net revenue can total \$26,691,271.

Illustration of Potential Increases in the Annual Fund Based on GG+A Ratings

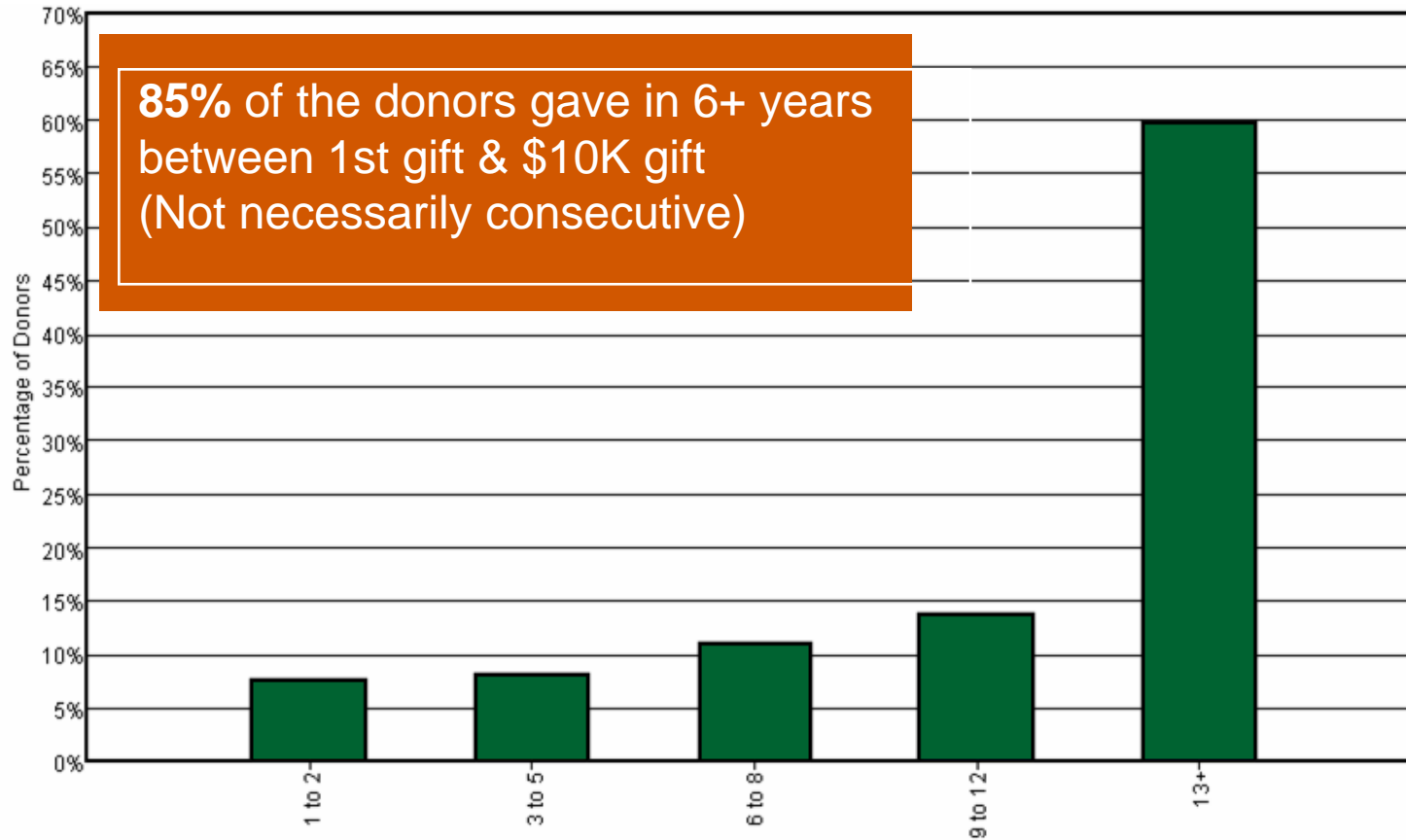
	Annual Giving Rating					Total Gained	Total Giving
	1 (\$5,000+)	2 (\$2,500-4,999)	3 (\$1,000-2,499)	4 (\$500-999)	5 (\$100-499)		
Total Number of Constituents	6,930	11,347	13,918	95,535	300,943		
Donors Below Level	4,386	10,739	12,569	93,545	295,417		
Average Largest Giving Year	\$1,108	\$796	\$355	\$107	\$10		\$30,903,978
10% Donors Upgraded	439 \$5,000	1,074 \$2,500	1,257 \$1,000	9,355 \$500	29,542 \$100		
Dollars Gained	\$1,708,479	\$1,830,165	\$810,558	\$3,675,459	\$2,653,027	\$10,677,687	\$41,581,665
25% Donors Upgraded	1,097 \$5,000	2,685 \$2,500	3,142 \$1,000	23,386 \$500	73,854 \$100		
Dollars Gained	\$4,269,251	\$4,575,412	\$2,026,072	\$9,188,058	\$6,632,478	\$26,691,271	\$57,595,249



Percentage of Giving Years Between First Gift and First Gift of \$10,000+



Number of Calendar Years Between First Gift and First Gift of \$10,000+



Past Giving Trend Analysis:

Consistency of Giving in Last 6 FYs	Total Giving in Last 6 Fys			
	Less than \$1,000	Less than \$5,000	Greater than \$5,000	All Donors
1 out of 6	31.4%	4.9%	3.3%	24.2%
2 out of 6	17.9%	5.2%	3.0%	14.3%
3 out of 6	14.0%	7.9%	4.5%	12.1%
4 out of 6	11.5%	13.8%	7.7%	11.6%
5 out of 6	11.1%	20.5%	16.3%	13.2%
6 out of 6	14.1%	47.6%	65.3%	24.6%
Total	7,963	1,887	1,003	10,853



Events and Giving:

# of Events Attended	Average Lifetime Giving	Count of Donors
0	\$ 1,630	8,435
1 to 5	\$ 4,234	5,778
6 to 10	\$ 15,871	337
11 to 15	\$ 18,060	67
16 to 20	\$ 23,448	21
>20	\$ 42,096	14



Events and Giving:

# of Events Attended	Average Largest Gift	Count of Donors
0	\$ 465	8,445
1 to 5	\$ 1,399	5,835
6 to 10	\$ 6,476	366
11 to 15	\$ 6,119	75
16 to 20	\$ 13,217	28
>20	\$ 21,671	23



Developing Complex Segments

Largest Giving Year FY02-06

Key Characteristics	\$1,000,000+	\$250,000 to 999,999	\$100,000 to 249,999	\$25,000 to 99,999	\$10,000 to 24,999	Total
	147	298	518	1,491	1,753	4,207
Mean Age (by Age at Time of Gift Year)	64	58.3	59.6	55.9	55.3	56.5
"BEST" PRIZM (1,2,3,4,7,8,9,10,11,62)	46.3%	47.3%	48.3%	50.6%	53.1%	51.0%
Gerographic Location (Top 3 States)	PA, NY, CA	PA, NY, CA	PA, NY, CA	PA, NY, NJ	PA, NY, NJ	PA, NY, NJ
Mean Largest Gift Commitment (Lifetime)	\$3,731,903	\$643,215	\$238,529	\$95,647	\$31,336	\$252,286
Mean Cumulative Gifts Years	13.2	10.8	12.7	13.1	12.7	12.7
% Alumni	63.3%	62.4%	66.4%	76.3%	73.1%	72.3%
% iBanker	1.4%	1.3%	1.9%	1.9%	2.0%	1.9%
Assigned to Staff	69.4%	65.1%	74.3%	71.0%	53.0%	63.4%

Prospect assignment rates seem low, suggesting there may be a lack of recent data in the database

Note: Includes all donors; includes gifts and pledges 1990-2006



Management Issues Addressed Through Analytics

- Develop a deeper understanding of the prospect and benefactor populations in order to better predict future behavior
- Continue to evolve management reports to allow faster and more accurate adjustments to staff resource allocation
- Identify risks to fundraising success, either in terms of changing donor/prospect behavior or changes in development techniques and practices

Questions you can answer with analytics

- How fast do prospects typically move between gift levels (e.g., annual fund, leadership annual giving, major giving)
- How do planned givers behave prior to their planned gift?
- How do planned givers behave after they identify their bequest intention?
- Which groups of athletic donors are most likely to become University donors? In what time frame? At what level?
- What is the impact of event attendance on donor behavior? Of student activities?
- Where are we most likely to see “out of nowhere” gifts? What can we learn about them that will make them more predictable?



Questions you can answer with analytics

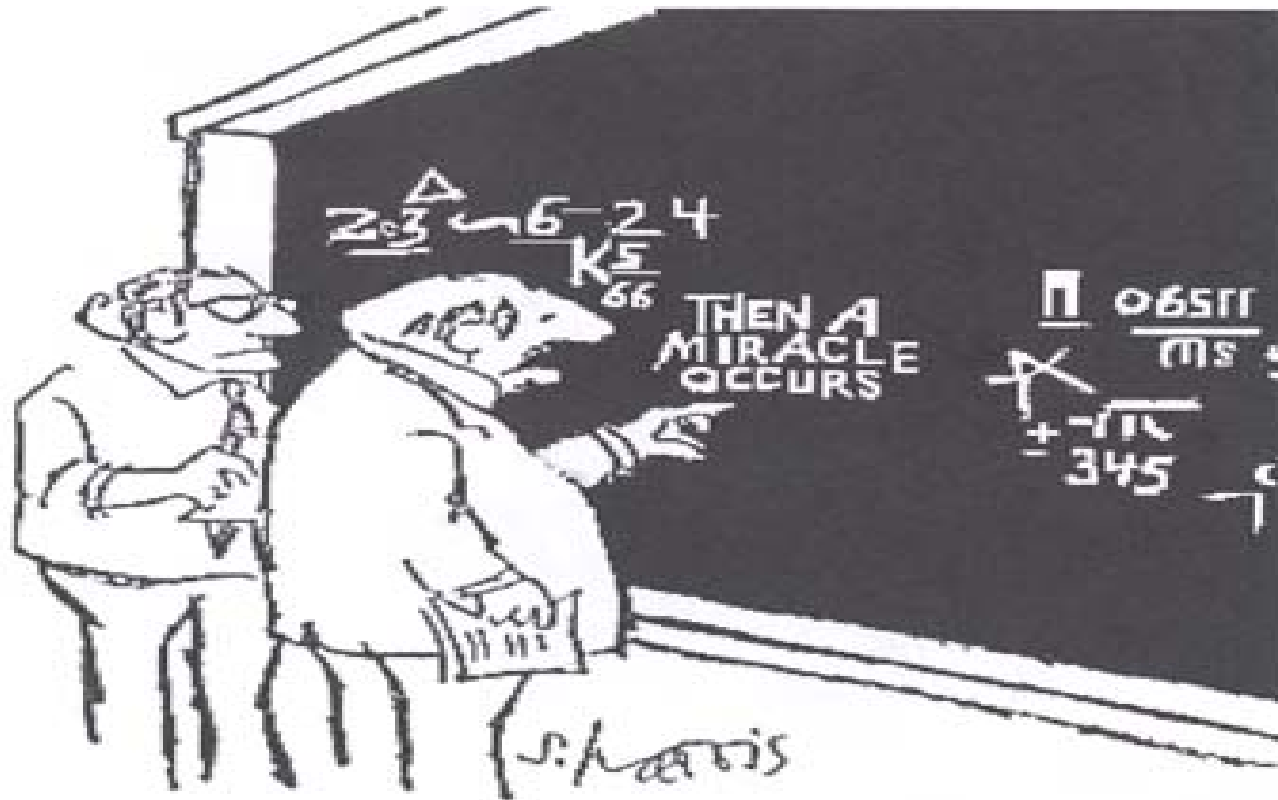
- Annual Giving
 - Which groups are more likely to be retained once acquired?
 - Which groups are more likely to upgrade?
- Portfolios
 - What is the optimal size?
 - Where do the greatest areas of opportunity exist for deploying new staff?
 - What is the appropriate mix for portfolios (e.g., stewardship, qualification)

Questions you can answer with analytics

- Development Officer Behavior
 - What patterns exist in how development officers cultivate different types of prospects (e.g., stewardship)?
 - What is the financial impact of face-to-face visits vs. phone calls?
 - What is the impact of multiple development officer assignments?
 - What is the impact of contacts by multiple Foundation staff members?
- Performance Management
 - What measures should the Foundation be using to measure development officer performance?
 - What measures should the Foundation be using to measure performance by campus or unit?



Questions?



"I THINK YOU SHOULD BE MORE EXPLICIT HERE IN STEP TWO."