



How Do Our Donors Love Us? Let Us Count The Ways!

A Home-Grown Affinity Rating System

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Agenda

- * Introductions to BIDMC & our prospect universe
- * From problems to solutions
- * Process
- * Working with a programmer
- * Verification & next steps
- * Expectations vs. reality
- * What if you don't have a programmer?

Introductions

- * The team: Donna, Meg, Molly
- * Beth Israel Deaconess Medical Center
- * Our prospect universe

From problems to solutions

- * Why we needed an in-house affinity rating system
- * Inspired by Josh Birkholz's book, *Fundraising Analytics*
- * Working with Operations to create a unique weighted score that captures donor affinity for BIDMC
- * BIDfinity scores were validated by an outside consultant, and are ***more predictive of major giving than any of our other ratings***

Process in a nutshell:

- * Decide what “affinity” to BIDMC/your organization looks like
- * Choose data points in collaboration with Ops, major giving staff
- * Iterative process:
 - * Programming in SQL
 - * Running export
 - * Fixing problems via collaboration with fundraising & Ops staff
 - * Validating results internally & later with a vendor
 - * Presenting results to senior leadership, highlighting new prospects/groups
 - * Importing scores to RE
 - * Using scores to refine prospect pool

Working with a programmer: Defining the specifications

- * Collaborate with fundraising staff, managers, Operations
- * Know your donors and your database; create major gift profile if you don't
- * Keep your expectations realistic—plan for long timeframe
- * Know your limitations
- * Bring in an expert!

The expert!

- * Interfacing with your tech asset, or how to talk with your geek
- * Good specs, bad specs
- * Code vs. output
- * Know that what comes out depends on what goes in

ATTRIBUTES	POINTS
Board of Directors	6
Average gift amount \$250 or more AND 3 or more gifts in past year	5
Board of Directors Emeritus	5
Gift in 10 of last 11 years	5
Gift in honor of a physician	5
Gift of \$5k or more in last 5 years	5
Trustee Advisory Board	5
Board committee or advisory committee member	4
Board of Overseers	4
Legacy family member	4
Patient record	4
Trustee Advisory Board Emeritus	4
Board of Overseers Emeritus	3
Board or advisory committee chair	3
Gave through DAF or family foundation	3
Gift of \$100 or more in last 3 years	3
Face-to-face visit in last 5 years	3
VIP visit	3
Spouse has patient record	3
2+ gifts IMO same person within the last 5 years	3
Former board or advisory committee chair	2
Event attendance in last 3 years	1
Current BIDMC physician	1
Completed screening call (no voice mail)	1

Exclusions

- * Special cases such as: specific donors affiliated with one physician (their affinity is to her/him, not to BIDMC)
- * Donors who give ONLY to 3rd-party events (tennis tournament, e.g.)
- * Tribute gifts to non-physicians
- * Reviewed and disqualified for major giving
- * Deceased constituents
- * Your list will be different!

BIDfinity Aggregated Results

81,780 constituents scored at least 1 point. The list includes:

- * 68,977 people with patient records
- * 7,892 who made a gift of at least \$100 in the last 3 years
- * 4,238 with a completed screening call
- * 3,515 who attended an event within the last 3 years
- * 2,111 current physicians
- * 1,720 made a gift in honor of a physician
- * 1,642 have a spouse with a patient record
- * 1,335 with face-to-face visits
- * 1,262 with an average gift of \$250 or more AND 3 or more gifts in the past year
- * 990 giving via a DAF or family foundation
- * 901 made 2 or more gifts in memory/honor of the same person within the last 5 years
- * 517 employees and 45 former employees
- * 354 board members
- * 244 had a VIP visit

- * Total possible points is 58; highest score of this group is 47
- * Average age is 55.60
- * 828 have a Prospect Manager ; 292 have a Relationship Manager
- * 561 have a spouse with a Prospect Manager or Relationship Manager
- * 259 have a spouse who is a board member.

BIDfinity Connection Scores

BIDfinity connection score	Connection label	Number of unassigned
24 to 47	A: Most connected	17
16 to 23	B: Very connected	139
10 to 15	C: Connected	334
5 to 9	D: Modestly connected	372
1 to 4	E. Slightly connected	74
TOTAL		936

- * Unassigned, not current physician or employee, not current board or committee member or chair, spouse is unassigned, spouse is not a board or committee member, lifetime giving of \$2500 or higher, and last gift since 2010

Connected, Wealthy, and Unassigned

WE rating	A: Most Connected	B: Very connected	C: Connected	D: Modestly Connected	E: Slightly Connected
\$5M+	0	0	1	0	0
\$1M-\$4.99M	1	12	24	11	3
\$500K-\$999K	2	18	33	31	14
\$250K-\$499K	5	34	72	57	23
\$100K-\$249K	7	26	56	40	8
Under \$100K	1	36	68	66	14
Unrated	1	13	80	167	12
Total	17	139	334	372	74

Unassigned, not current physician or employee, not current board or committee member or chair, spouse is unassigned, spouse is not a board or committee member, lifetime giving of \$2500 or higher, and last gift within last 5 years (rolling)

But how to verify the results?

- * Outside vendor contracted to analyze existing processes
- * Used exclusive variable testing
- * Their findings re BIDfinity:
 - * Donors with a high score were 10x more likely to give
 - * Highest predictive data points: committee & board membership, event attendance, contact with gift officers, planned giving society membership, BIDfinity score
 - * Least predictive data points: wealth ratings (both internal and external)

How we use the results

- * Share with fundraising staff and senior leadership
- * Refine prospect pool; add more filters to export to refine more deeply
- * Rebalance portfolios
- * Curate guest lists for events
- * Create targeted mailings and appeals
- * Disqualify some prospects from major giving and move to Annual Fund and/or direct mail
- * Re-run when new large groups of constituents are added to RE

Expectations: what we hoped to find:

- * Verification of our instincts & analysis
- * Highly-rated, highly connected unassigned prospects:
hidden gems
- * A new analytical tool to use with existing ratings

Reality: what we found:

- * Verification of our instincts & analysis: **We know our donors really well!**
- * Highly-rated, highly connected unassigned prospects: **very few hidden gems; confirmation of our current good practices; targeted group of new prospects; interesting outliers**
- * A new analytical tool to use with existing ratings: **easy to refresh; stronger collaboration with Ops**

But what if you don't have Donna??

- * Actively connect with Ops, Advancement Services, etc.
- * Experiment with database exports & Excel
- * Learn how to make pivot charts and tables
- * Connect with others who want to learn
- * Read Josh Birkholz's book, *Fundraising Analytics*, learn SPSS
- * Read Peter Wylie's books, *Data Mining*, *Score!*
- * Hire a college student
- * Budget for hiring a freelance SQL programmer