

Donor Discovery on the Relationship Profile

Donor Discovery is integrated within the Relationship Profile of Fundraiser Performance Management. Subscribers to Donor Discovery are able to request on-demand access to detailed wealth screenings so front-line fundraisers can have current and reliable data prior to a first meeting with a prospect, or while preparing a proposal. Just click the **Run Screen** button to request a brand new screening or click **Update Report** to get an updated screening on a constituent that had previously been run. You will see the **Last Screening** date and time stamp right above the button as well.

Initially, you will see a summary of the Donor Discovery data (outlined below). Click on **Open Full Report** to drill into a detail view that includes a full summary of:

- Philanthropic Giving
- Nonprofit Involvement
- Real Estate Ownership
- SEC Insider Stock Transactions
- Recommended Ask Amounts
- “Quality of Match” Scores

The screenshot displays the Donor Discovery interface. At the top, it shows 'Resources' with a link to 'Understanding Donor Discovery Data (PDF)'. Below this, the 'Donor Discovery' section indicates that 454663 screenings remain and the contract expires in 3 days. The last screening was on 01/20/2016 at 6:03 PM. A green 'Open Full Report' button is visible. The main content area is divided into several sections: 'Report Quality Score' (19.2/30), 'Target Ask Based on Giving' (\$500 - \$999), 'Target Ask Based on Wealth' (\$250,000 - \$499,999), 'Largest Gift to an Organization' (University of Illinois Medical Center, \$500 - \$999), 'IRS990PF' (N/A), and 'SEC Insider' (N/A). The 'Donor's Wealth Capacity and Demonstrated Philanthropy' section includes 'Wealth Capacity' (5/5), 'Demonstrated Philanthropy' (4/5), and 'Major Giving EVI' (98/99). A 'Philanthropic Overview' section features a donut chart and 'Philanthropic Interest Percentages' for Higher Education, Education, and Democra.

Donor Discovery Report Summary

Report Quality Score - The quality score is the output of a DonorSearch algorithm that looks at name match, name commonality/uniqueeness, presence of middle name/initial, spouse name, suffix, and proximity. The overall score for a record or profile is an average of each data element having an individual quality match at or above 17.0. If an individual data element does not have a quality score at or above 17.0, it is not included in the overall score, although those data elements *are* returned so that you may validate it later. However, if an individual data element's score is less than 12.0, that data element is not returned.

Additionally, for a profile to successfully return a screening result, the overall quality score must be at or above 12.0.

Target Ask Based on Giving - A dollar range that is determined in conjunction with the constituent's demonstrated philanthropy. This target ask amount is established based on the single largest gift range a prospect or donor has made to a charitable organization. This may vary from the Target Ask Based on Wealth, due to the availability of public records related to wealth.

Target Ask Based on Wealth - A dollar range based on the estimated wealth capacity and represents the amount a donor can give as a "stretch" gift over a five-year period. This range is based on DonorSearch's proprietary algorithm that estimates wealth based on known markers, such as real estate and SEC Insider information. The Target Ask Based on Wealth is roughly 10% of the donor's estimated net worth. This range may be very different than the Target Ask Based on Giving.

Largest Gift to an Organization - The single largest gift the constituent has made to either a charitable organization.

IRS990PF - Identifies whether the constituent is associated with a namesake grant-giving foundation.

SEC Insider - An SEC Insider is defined by the SEC as:

- An officer of a public company
- A director of a public company
- An individual or entity owning 5% or more of any class of a company's shares

Wealth Capacity - A wealth rating from 1-5 based on sophisticated wealth markers from DonorSearch, which are weighted appropriately to arrive at a more accurate estimate of wealth capacity. Real estate, for example, is not as liquid as stock ownership, resulting in it being weighted less when estimating capacity to give.

Wealth Markers Provided by Donor Discovery

- Real Estate Ownership
- SEC Insider Transactions
- Boat/Plane Ownership

Based on DonorSearch methodology, Donor Discovery presents a rating of the overall wealth capacity of the donor, according to the criteria below. The detailed report for a prospect provides a listing of real estate and SEC Insider transactions to support further analysis.

Rating	Description
5/5	Exact match to exceptional markers of wealth: DonorSearch real estate holdings of \$2 million+, Foundation Trustees, SEC Insiders, Nonprofit board members
4/5	Exact match to lower, but notable markers of wealth, including real estate holdings of \$1-2 million
3/5	Exact matches to DonorSearch real estate holdings of \$500,000- \$1 million, owning 2 or more pieces of real estate or owning real estate in a trust
2/5	Owning one piece of real estate under \$500,000. Possible matches as an SEC insider, nonprofit or foundation board member
1/5	No noteworthy matches to wealth indicators
0/5	No results returned.

Demonstrated Philanthropy - An individual's giving history to other organizations is included in Donor Discovery's measures of Demonstrated Philanthropy. By reviewing a prospect's past philanthropic activity, researchers and gift officers can find insights that may be useful in building the relationship and in constructing a proposal strategy.

Philanthropic Markers Provided by Donor Discovery:

- Number of Gifts
- Amount of Gifts
- Dates of Gifts
- Types of Organizations Supported
- Names of Organizations Supported

With Donor Discovery, a rating is provided for the overall demonstrated philanthropy of the donor. This rating is determined according to DonorSearch's methodology, based on the criteria below. In addition, the detailed Donor Discovery report includes a listing of all donations given to charities, and is provided to support in-depth analysis into the giving history of the donor.

Rating	Description
5/5	Exact match as a donor giving \$5,000 or more to an organization found in the giving history archive.
4/5	Cumulative likely giving at or above \$10,000.
3/5	Cumulative likely giving between \$5,000 to \$10,000.
2/5	Cumulative likely giving totaling \$5,000+ plus a charitable gift above \$500.
1/5	Exact/very likely matches to individuals giving gifts elsewhere.
0/5	No noteworthy matches to giving history.

Major Giving EVI - The Fundraiser Performance Management Major Giving Expected Value Index score is based on a predictive model that we've built specifically for your institution. Its purpose is to rank order all of your individual constituents with a score from 1 to 99 based on their expected value to your institution next year. The EVI scores considers previous giving, wealth, and other demographic factors. It is designed to accelerate prospects through the qualification funnel where specific analysis and discovery may be done.

Philanthropic Interest Percentages - A graphical overview that provides a summary of the philanthropic interests of the donor for their lifetime. For additional detail, see the Detail Report.

Philanthropic interests representing 1% or less of the overall total will be represented in the legend, but will not appear in the chart. To access the data related to these interests, hide the interests that have the most significant percentages from consideration by clicking on the related legend.