Automatic Screening

What is this?

Through an integration with Donor Search, the platform automatically runs wealth and philanthropy screens on your high-value prospects, adding several key fields to the Relationship Profile. The results of these screenings are also searchable via Targeter filters and columns.

This feature is free for all Fundraiser Performance Management clients but must be enabled via Control Panel.

What Information Will I See?

The following information may be included (note that not all information can always be found for all individuals):

- Demonstrated Philanthropy Score
- Largest Single Gift
- Are They an SEC Insider?
- Are They a Foundation Board Member?
- Report Quality Score

Where Can I Find This Information?

The results of an Automatic Screening will display in the Relationship Profile of the entity in the Donor Insights section. It also can be viewed via columns in Targeter and viewport drilldowns.

How Often Will Screenings Take Place?

Your most high-value entities, including all of your assigned prospects, will be screened on a regular basis. The rest of your entities may be screened as well, though less frequently.

How Can I Tell Who Has Been Screened?

A set of filters are available in Targeter that allow you to search on the results of the Automatic Screenings. Using the Automatic Screening Date filter is the best way to find the complete list of entities that have been screened.

How Is This Different from Donor Discovery?

Both Automatic Screenings and Donor Discovery use the same Donor Search wealth and philanthropy screening service. What separates them is the frequency and depth of the results. Automatic Screenings gives you a frequently refreshed, limited snapshot of your prospects (focusing on just five key insights). Donor Discovery provides in-depth results (with potentially hundreds of insights returned) at your team's request.

For customers who already have Donor Discovery, the screenings you run on your prospects with Donor Discovery will remain intact. All of your high-value entities will also be screened with the Automatic Screening feature too, allowing you to keep an eye out for changes with your prospects.

How Will I Know When Something Has Changed?

The platform will notify you when one of your assigned prospects has new results from an Automatic Screening (compared to the last time they were screened).

When that happens, you will be notified via a notification in the drawer in the platform and as part of our weekly digest email. (Both of those notification options can be configured via the My Notifications menu.)

No notifications will be sent the first time an entity is screened. They are sent when subsequent screenings return different results.

Should I Have any Privacy Concerns on Behalf of my Constituents?

Donor Search does not retain any identifiers of the source or destination of any searches. All of your constituent data is removed from Donor Search's records as soon as the screening process is complete. The data is transferred between Fundraiser Performance Management and Donor Search using secure and private channels.

How Do I Sign Up?

The feature is turned off by default and must be enabled by your system administrator. They can do so by going to Control Panel > Manage Platform > Integrations.

Your institution will need to sign a new terms agreement before this feature can be fully enabled. Your system administrator will be able to manage that process from Control Panel.

If you previously have activated this service and choose to deactivate it, please contact Support.

Is there an Additional Charge for These Screenings?

No, there is not an additional fee for this information. The functionality is included with your current Fundraiser Performance Management subscription.