



TRENT BEATTIE



VP Channels & Strategic Alliances

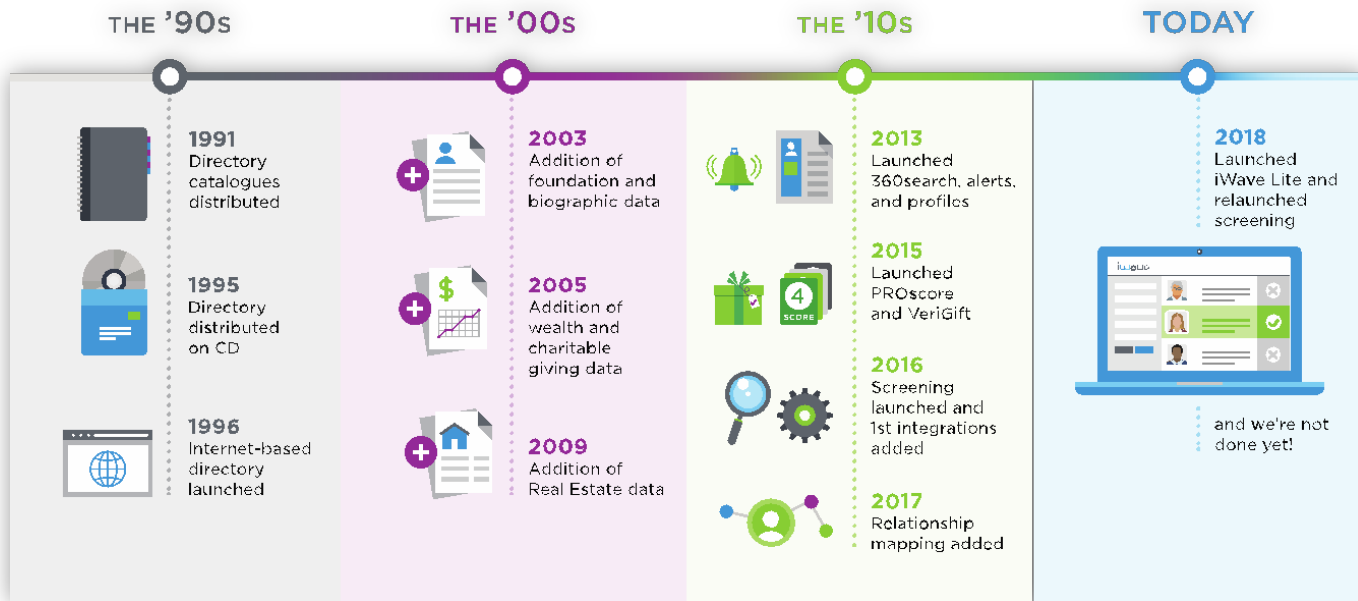
The 3 Keys To Raising More Major Gifts

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We Have Over 27 Years Of Experience

iWave™: The Evolution



What Does Giving Look Like In 2019?

FACT #1

Giving is stagnant.

FACT #2

Donors are down.

FACT #3

Competition is increasing.

What Does Giving Look Like In 2019?

FACT #1

Giving is stagnant.

THIS MEANS PORTFOLIOS NEED NEW PROSPECTS

FACT #3

Competition is increasing.

A Focus on Interests And Engagement

Fewer households donating,
but high net worth individuals
are giving bigger gifts

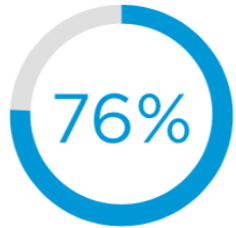


Giving USA

To help weather the changing landscape, nonprofits can no longer rely on a prospect's philanthropy. They must look at their interests and other behaviors.

The Importance of Fundraising Intelligence

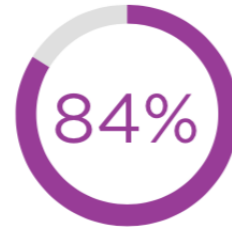
Fundraising intelligence is a powerful strategy focused on developing major gift asks with data-informed research.



Nonprofits that rely on **prospect research**



Nonprofits that use **wealth screening**



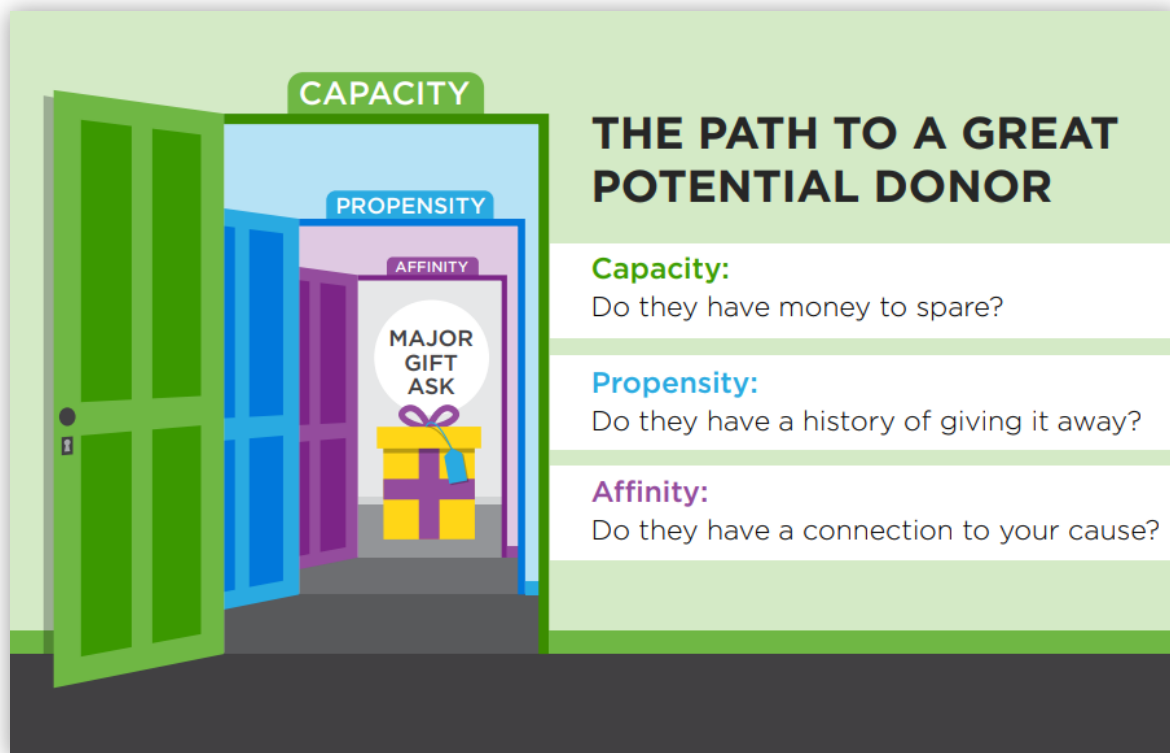
Organizations with dedicated research and screening efforts that **met their annual fundraising goals**

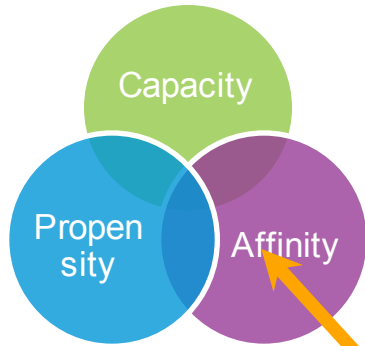
GivingUSA

What Exactly is Fundraising Intelligence



The 3 Keys To Fundraising Confidence





“...someone with money who is a giver to others can still not be into your mission. Another might love everything you do, but has no discretionary dollars to share.”

– David Lawson

The Sweet Spot:

A 360° understanding of your prospective donor

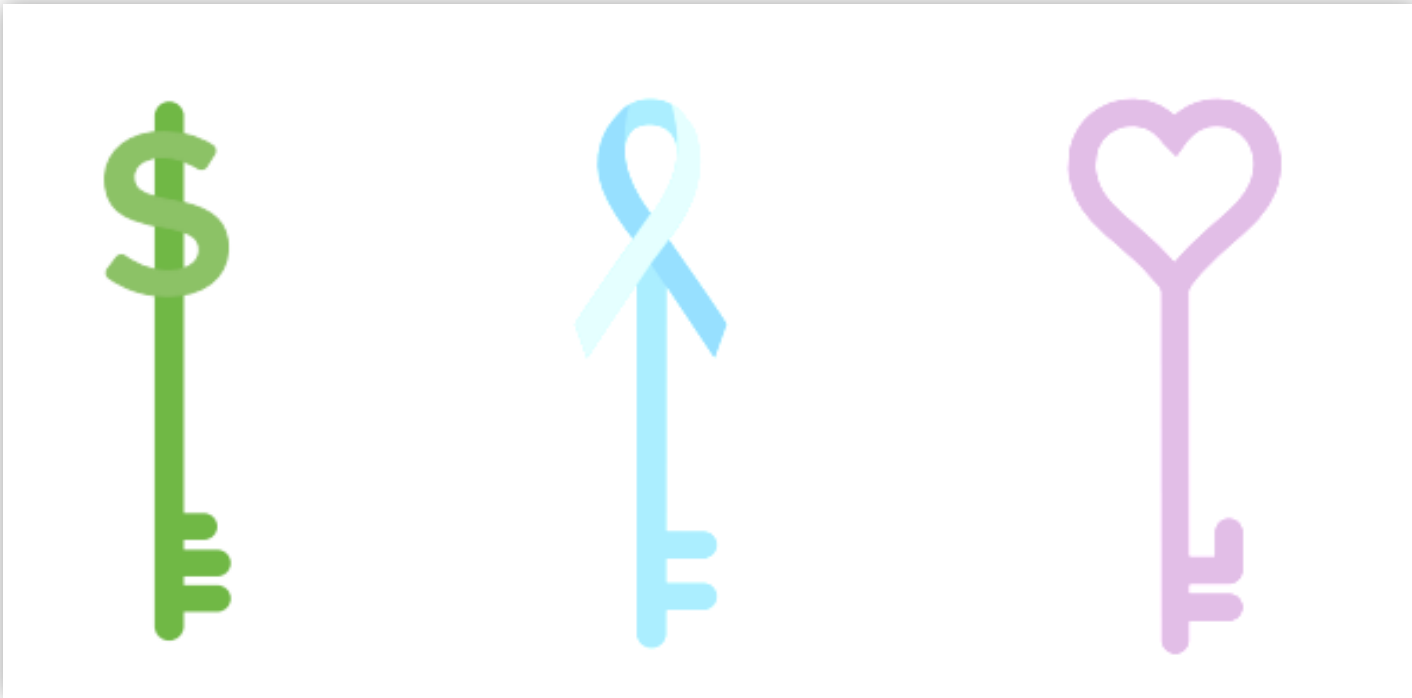
Two keys may overlap, but when all three are known and support each other, that's when you have a great prospect.

Before The 3 Keys Existed

- Real Estate used to be considered the 'silver bullet' to determine capacity to give.
- Development professionals depend on much more intel to determine their prospects' capacity.
- Capacity isn't the only key to understanding giving.

What Do You Depend On?

Key 1 – Capacity

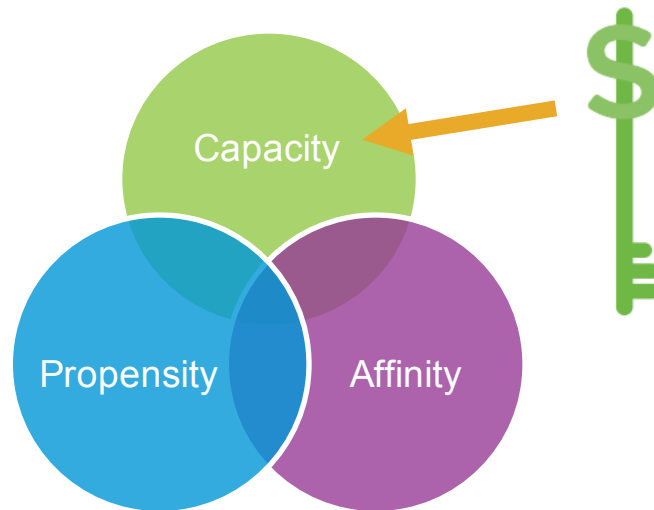


Capacity Indicators

Do they “have” what it takes to be a major gift donor?

5 types of information used to determine capacity:

1. Real Estate Holdings
2. Income
3. Charitable Giving
4. Stocks and Assets
5. Political Giving



Capacity Indicators

Do they “have” what it takes to be a major gift donor?

Do They:

Own Property?

Own stock?

Have a large income?



Calculating Capacity

Capacity based
on Real Estate

=

Average Value of
Primary Residence

+

Average Value of
Additional Property



Current/Assessed Property Value	Primary Residence Multiplier	Additional Property Multiplier
< \$500,000	5%	7.5%
\$500,000 - \$999,999	7.5%	10%
\$1,000,000 +	10%	15%

Joanne's Major Gift Capacity Over a 5 Year Period:

Toronto Home

\$950,000

x 0.075

\$71,250

Muskoka Cottage

\$700,000

x 0.10

\$70,000

\$71,250 + \$70,000 = \$141,250 (capacity)

Key 2 - Propensity

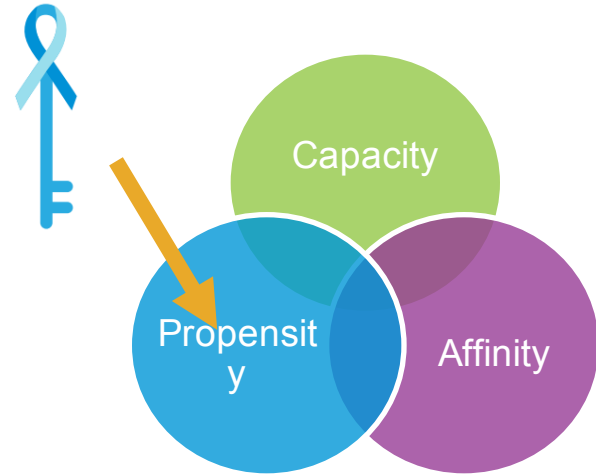


Propensity Indicators

Do they “have” what it takes to be a major gift donor?

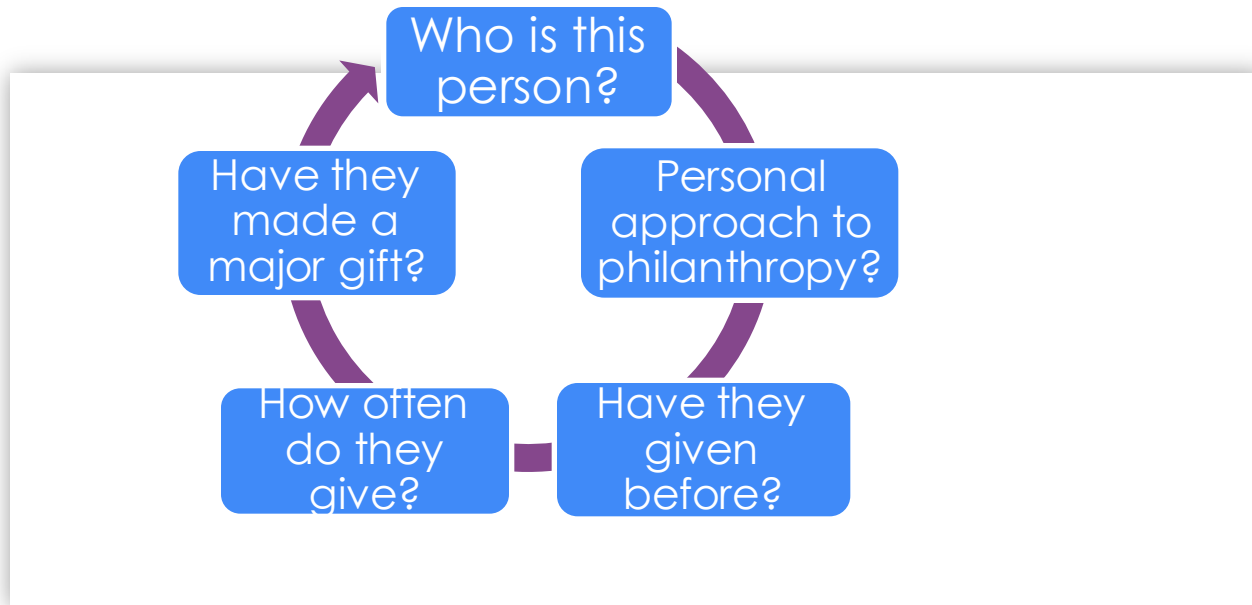
3 ways to determine capacity:

1. Internal Giving
2. External Prospecting
3. Political Giving



Propensity Indicators

Past giving is a good indicator of future giving.

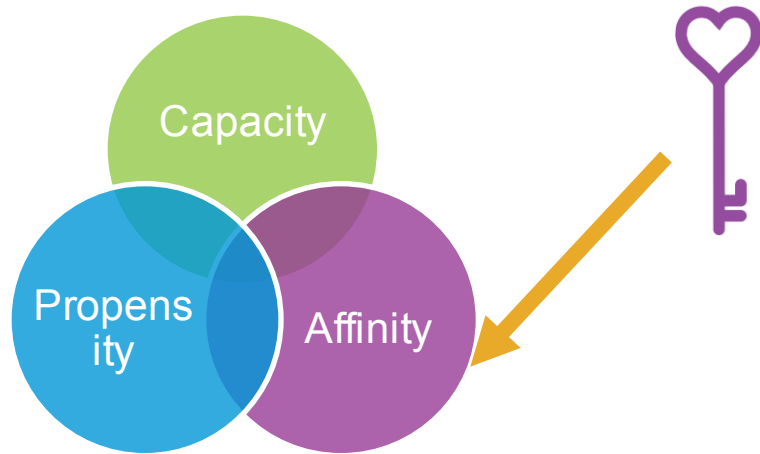


Key 3 - Affinity



Affinity

The strength of a person's interest in a cause.



Helen Brown Group
declared affinity the
most important element
of the ratings
scorecard!

Affinity Indicators

Internal Indicators

Lifetime Donors

Family Connections

Event Attendance

Volunteer Time

Content Subscriber

Fundraising Participant

Affinity Indicators

External Indicators

Give to similar organizations

Volunteer at similar organizations

On the board of like foundations

“iWave reveals past giving history with accurate records, providing critical insight for the fundraising team to make the right ask to the right organization or individual”.

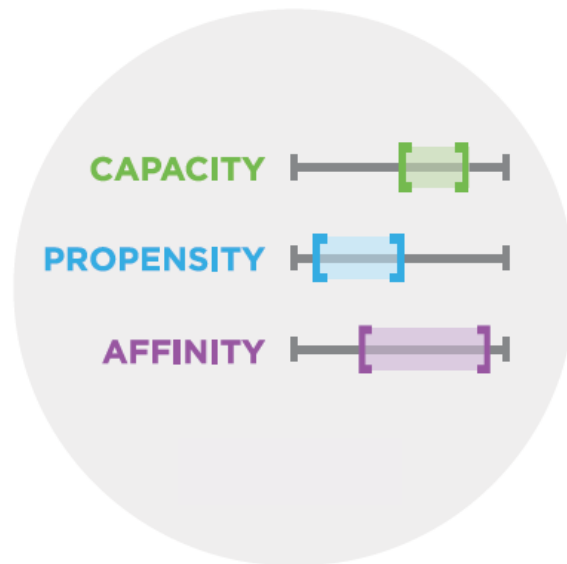
-Amy Udel

Operation Kindness



Putting Them All Together

- Target those with established **Propensity**
- Each project campaign may rely on a different **Affinity**
- **Capacity** targets can vary by organization and campaign



Vancouver Aquarium

The Problem:

Attract major gift donors with an affinity to the aquarium and the capacity to give



Vancouver Aquarium

The Solution:

Leverage verified giving data to find prospects with an affinity to their organization as well as the capacity and history of donating major gifts.



Prospect Score

A scoring system with built in customization and transparency that indicates top donor prospects.



Prospect Score



PRO SCORE
4

Jane Thomas
CEO

23 Gifts
3 Foundations
2 Properties



PROPENSITY Rating

Do they have a history of giving?



AFFINITY Rating

How much do they like your cause?



CAPACITY Rating

How much do they have to give?

4 Propensity

1 Affinity

3 Capacity

< Hide Details

4 Strong

2 Fair

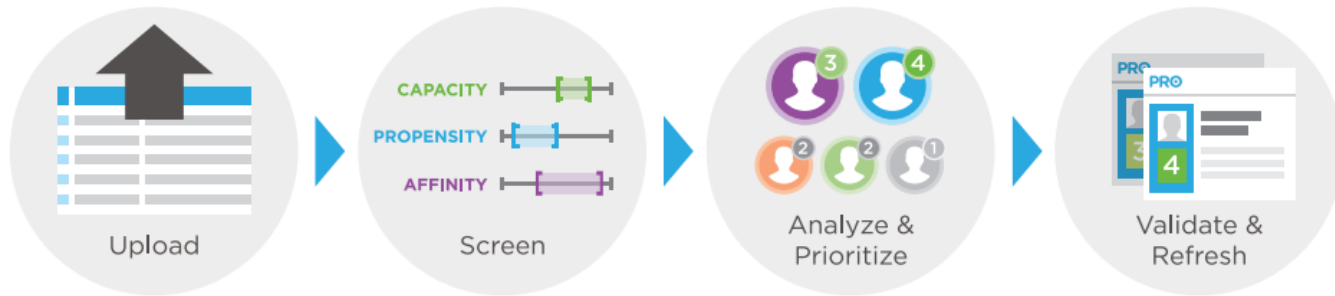
3 Good

1 Weak

Refresh Score

Identify Your Strongest Donors With Screening

Use screening to uncover unknown donor prospects hidden in your database



"I can screen 200 alumni in a certain area across all kinds of datasets and pinpoint 50 who came back above a certain threshold – that takes half an hour".

-Ryan Marshall, Concordia University

Remember – Fundraising Intelligence!



Propensity to Give

Does the prospect have a history of philanthropy?



Affinity to Your Cause

Does the prospect have a connection or interest in your mission?



Capacity to Give

Does the prospect have enough wealth to contribute a major or planned gift?

Download The Ebook

- There are 3 Keys –
Propensity Affinity Capacity
- Don't settle for “One-Size-Fits-All”
- Use the Whole Picture
- Find More Gifts – in Your
Database



Download The Ebook Here:
iwave.com/3-keys



Thank you!
Do you have **any questions?**



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