

Finding your Bequest Prospects using data as your guide

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Saturday, 26th February 2011
12.05 pm

About you

- Established Bequest Programme?
- Currently working in the bequest area
- Years in Fundraising
- Does anyone not have a database?
- Experience with Excel
- Who currently sources their own data?

Our aims for this session

- Understanding of basic segmentation of data
- An idea of selection criteria to access potential bequest prospects
- How to read data in excel and identify the best potential bequest prospects
- Understand that this is just the beginning of the development of your bequest prospect list
- A few other ideas of methods to identify prospects that might work for you

So you find yourself responsible for identifying bequest prospects – what now?

- Who are your donors?
- How can you look at thousands of names?
- How can you identify your prospects
- Work with data to know your donors

Does your Database look like this? A jumble of names with a hit and miss approach?
Who is driving the data??



DM Donor Management System _ □ ×

File Search Additional History Help

DM

Donor Management Pty Ltd

Donor Add/Edit

10/02/2011

Donor Num:

Title: Name1: Surname:

Position:

Company:

Donor Type: Sortkey:

Salutation: Overseas:

Street 1:

Street 2+3:

Suburb:

State: Postcode: DPID: Pre Sort:

Email: Sex: (M/F/B/)?

Tel Work: VIP: (Y/N)?

Home: Alt Salutation: (Y/N)?

Fax:

Mobile: Kind Code:

Mail Code:

STATUS:

DIAGNOSED: Flag2: Comments:

Code Description: NO EXTRA CODE Press Enter To Continue:

Acquisition Date:

Last Changed By: on

No Mail Until:

Birth Date:

Donor Source:

Member: (Y/N)

UserCde2:

: (Y/N)

Bought Goods: (Y/N) \$

Extra Codes:

Where to start

1. How has it been done in the past?
2. Check if data has been 'segmented'
3. If not, identify those that are most likely to fit your criteria
4. What is your organizations criteria of a bequest prospect?
5. Communicate as though you know the donor – personally
6. Engage the Donor – tell them stories of what their support has achieved

Every Donor is an individual.

Communicate with them to reflect you know who they are

Bequests: Planning for the Future

TITLE	DONATION TOTAL	DONATIO N COUNT	TOTAL 2011	COUNT 2011	TOTAL 2010	COUNT 2010	DONATIO N FIRST	DATE FIRST	DATE LAST	CAMPAIG N	DONATIO N LAST
Miss	200	5	0	0	60	2	50	2/08/1999	19/03/2010	FRIEND10	10
Mrs	400000	5	0	0	75000	1	100000	29/06/2006	24/06/2010	MAJOR10	75000
Mr & Mrs	3190	6	0	0	1190	4	1000	9/09/1997	25/05/2010	PEARL10	1000
Dr	5500	6	1000	1	2000	2	500	30/08/2006	1/07/2010	DM2010	1000
Miss	1650	7	0	0	550	2	100	29/05/2000	9/02/2010	FRIEND10	50
Miss	2180	7	0	0	500	1	50	31/01/2002	29/06/2010	PEARL10	500
Ms	2000	8	0	0	250	1	250	10/12/2002	1/01/2010	PEARL10	250
Miss	21750	8	0	0	5000	1	250	14/08/2003	3/05/2010	PEARL10	5000
Ms	1800	8	50	1	250	1	250	17/06/1997	13/07/2010	DM2010	50
Mrs	1440	9	0	0	50	1	50	1/12/1994	3/02/2010	FRIEND10	50
Mrs	305	9	0	0	75	2	20	26/03/2001	5/03/2010	PEARL10	25
Mrs	15000	9	3000	1	1500	1	2500	20/12/1999	8/11/2010	SCHOLAR10	3000
Mr & Mrs	394	10	0	0	80	1	20	28/09/1993	28/01/2010	FRIEND10	80
Mrs	1390	10	0	0	400	2	125	11/11/1999	3/05/2010	PEARL10	250
Mr & Mrs	8100	10	0	0	1100	3	1000	17/07/1997	25/05/2010	FRIEND10	50
Prof & Mrs	25950	10	0	0	250	1	250	11/04/2001	3/06/2010	PEARL10	250
Mrs	653	11	0	0	0	0	20	24/06/1996	10/06/2009	FRIEND	55
Mrs	1315	12	0	0	250	2	40	27/05/1996	29/01/2010	FRIEND10	50
Miss	17795	13	0	0	7870	1	1500	17/05/1996	16/10/2009	SCHOLSHP	7870
Dr & Mrs	9040	14	0	0	1000	1	100	15/05/1991	12/04/2010	PEARL10	1000
Miss	2273	14	0	0	400	2	50	16/06/1999	28/06/2010	DM2010	100
Mrs	443	15	0	0	50	1	20	16/12/1993	1/02/2010	FRIEND10	50
Mrs	28000	15	0	0	10500	2	125	30/06/2000	15/06/2010	PEARL10	5000
Mr	38150	16	6000	1	6000	1	1000	24/03/1995	6/12/2010	AWARD10	6000
Mrs	6275	17	0	0	0	0	500	29/07/1993	24/06/2009	PEARL	600

First sort

- Miss first
- Ms second
- Mr or Dr etc third
- Mr & Mrs last

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Miss	1650	7	0	0	550	2	100	29/05/2000	9/02/2010	FRIEND10	50
Miss	2180	7	0	0	500	1	50	31/01/2002	29/06/2010	PEARL10	500
Miss	21750	8	0	0	5000	1	250	14/08/2003	3/05/2010	PEARL10	5000
Miss	17795	13	0	0	7870	1	1500	17/05/1996	16/10/2009	SCHOLSHP	7870
Miss	2273	14	0	0	400	2	50	16/06/1999	28/06/2010	DM2010	100
Dr	5500	6	1000	1	2000	2	500	30/08/2006	1/07/2010	DM2010	1000
Dr	65533	18	10000	1	11150	3	1000	12/04/2001	3/08/2010	PEARL10	10000
Mr	38150	16	6000	1	6000	1	1000	24/03/1995	6/12/2010	AWARD10	6000
Mrs	400000	5	0	0	75000	1	100000	29/06/2006	24/06/2010	MAJOR10	75000
Mrs	1440	9	0	0	50	1	50	1/12/1994	3/02/2010	FRIEND10	50
Mrs	305	9	0	0	75	2	20	26/03/2001	5/03/2010	PEARL10	25
Mrs	15000	9	3000	1	1500	1	2500	20/12/1999	8/11/2010	SCHOLAR10	3000
Mrs	1390	10	0	0	400	2	125	11/11/1999	3/05/2010	PEARL10	250
Mrs	653	11	0	0	0	0	20	24/06/1996	10/06/2009	FRIEND	55

Second sort

- How often have they given? – sort by Donation Count
- How long have they been giving? Sort by Date first, and date last
- What have they been giving to? – Check their campaigns
- Are they current?

Bequests: Planning for the Future

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Dr	65533	18	10000	1	11150	3	1000	12/04/2001	3/08/2010	PEARL10	10000
Dr	65533	18	10000	1	11150	3	1000	12/04/2001	3/08/2010	PEARL10	10000
Mr	38150	16	6000	1	6000	1	1000	24/03/1995	6/12/2010	AWARD10	6000
Mr	38150	16	6000	1	6000	1	1000	24/03/1995	6/12/2010	AWARD10	6000

So What's Your Bequest Prospect Criteria?

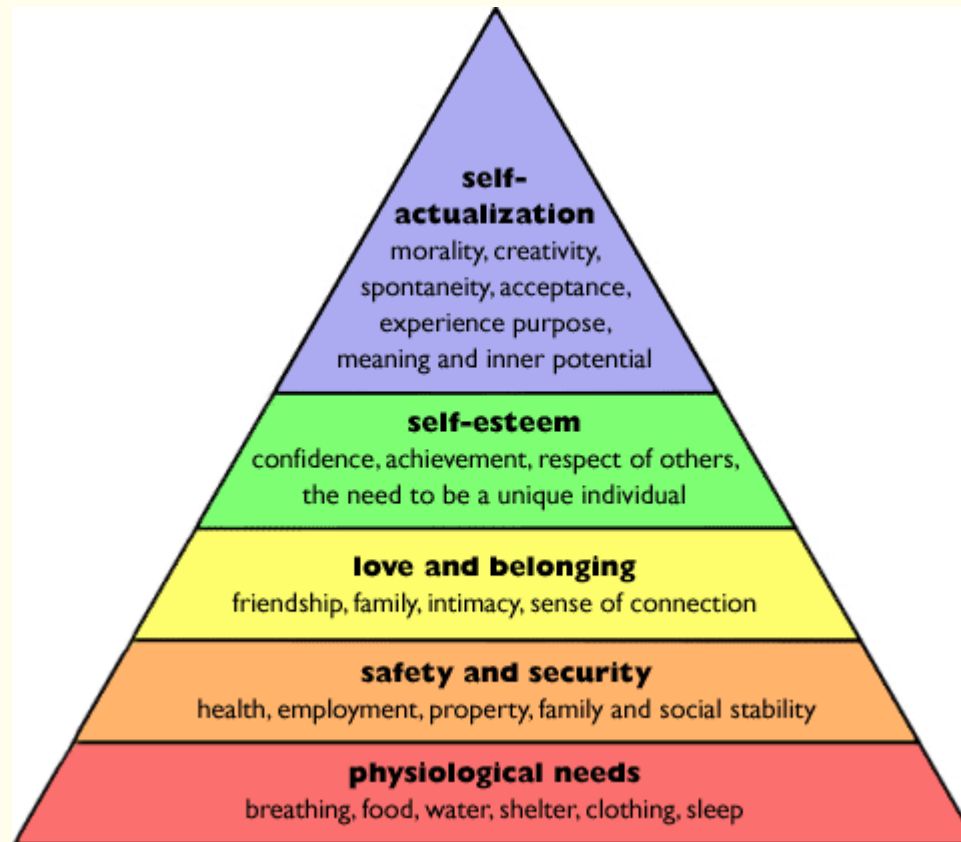
Some Suggestions:

1. a) Miss
b) Mr, Ms or Dr
c) Mr & Mrs
2. Age
3. 7 years, 10 plus gifts, \$500 donation total
4. 7 years, 20 plus gifts, \$1,000 donation total
5. 10 years x 10 gifts
6. 5 years x 5 gifts
7. Base your criteria on what your bequest officers can manage
8. Work with the most urgent first

Other ways to identify bequest prospects

- Questionnaires
- Recognition Events
- Direct Mail
- Maslow's Hierarchy of Needs

Maslow's Hierarchy of Needs



What next?

- Know your database – training is essential
- Decide what criteria is right for your organisation to identify bequest prospects
- If someone else is in charge, speak to them about creating a list of donors who meet the criteria
- Look through the data in an excel spreadsheet – what can you find
- If you can't use excel – now is the time to learn
- Ask the data manager to code those you have now identified as a prospect
- Continually monitor and update your data
- Every Donor is an individual – treat them in the right way

- Have you written down 3 things can you take away and use on Monday?

Write them down now.

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