

Donor Cast



People-driven analytics by

BENTZ
WHALEY
FLESSNER

WHAT ARE ANALYTICS?

Data-driven strategies are enhancing fundraising at leading nonprofit organizations. In recent years, the nonprofit world amass has converted to sophisticated relational database systems. These conversions have spawned a focus on institutional memory and prospect relationship management. Thus, there are unprecedented increases in the data about prospects and programs which cause savvy professionals to ask questions.

- How can we use this information to improve as an organization?
- Would data patterns help identify new potential donors?
- Is our information pipeline working to our advantage?
- Are the right prospects assigned to the right development officers?
- What are the metrics that will impact our success?

Analytics is a suite of techniques designed to answer these and similar questions. Techniques include:

- Data Mining—Discovering data patterns.
- Predictive Modeling—Forecasting future behaviors based on these patterns.
- Profiling—Understanding the characteristics and motivations of key groups.
- Metrical Analysis—Painting a data picture of people and programs.
- Projection—Anticipating program performance.

KNOW

FORECAST

REALIZE

DonorCast offers custom analytics services for nonprofit organizations. Our professionals understand the demanding needs and circumstances of development programs. Each program is distinctive because the people involved are distinctive. No two nonprofits have the same constituents. DonorCast designs exclusive analytics solutions for your constituents.

- Solutions to understand your people
- Solutions to enhance your programs
- Solutions to realize your potential

Our custom analytics services include:

DONORCAST PEOPLE

Constituency Analysis
Custom Research
Predictive Modeling

DONORCAST PROGRAMS

Development Program Data Analysis
Annual Giving Program Data Analysis
Projection Analysis

DONORCAST COUNSEL

Program Development
Training
Implementation Planning



Donor Cast People



KNOW YOUR PEOPLE

Constituency Analysis

You have thousands of constituents.

- Alumni as well as friends.
- Patients as well as caregivers.
- Members as well as single event attendees.

Some of your top donors may be loyal constituents responding to your organizational stability. Other donors are investors to important programs because of their social urgency. Can such differently motivated donors be identified the same way? Can they be approached the same way? Who are they?

DonorCast analyzes your constituency to identify and define your core segments.

Custom Research

DonorCast designs custom data collection services in areas such as:

- Constituent attitudes and preferences.
- Staff and board expectations, opinions, and input.
- Peer group benchmarking and best practices.

KNOW

FORECAST

FORECAST THEIR POTENTIAL

Predictive Modeling

Predictive modeling identifies new prospects, segments donors likely to respond to your annual solicitations, and predicts potential volunteers.

Find Prospects for Major and Planned Giving

DonorCast builds predictive models to identify new major and planned giving prospects. We identify these prospects using internal trends and statistical similarities with your top donors. DonorCast looks beyond previous giving and age to paint a more complete picture. Every person will be scored.

Segmentation Strategies for Annual Giving

Many factors are important to annual fund directors.

- Who will give to us? Who will renew?
- Who will upgrade? How much?
- What is the lifetime potential of this prospect?

DonorCast will help you address these questions with custom annual giving models. We will study your data and custom fit the scoring to your particular characteristics and trends.

Solutions for your Specific Plans

DonorCast engineers custom solutions for prospecting and segmenting needs. We can develop models from predicting grateful patients to integrating screening results to converting season ticket holders into donors.

REALIZE YOUR OWN

We will help you fill your portfolios with more prospects, understand the characteristics and motivations of your constituents, and build stronger relationships. The DonorCast results will provoke action, not fill space on the shelf.

Bentz Whaley Flessner consultants will lead you from expert analysis to action-oriented results by helping you with:

- Prospecting Strategies.
- Prospect Management and Tracking Systems.
- Major Gift Officer Training.
- Annual Giving Strategies.

REALIZE

Donor Cast Programs



KNOW YOUR PROGRAMS

Development Program Data Analysis

Bentz Whaley Flessner incorporates DonorCast people-driven analytics in assessments, studies, and counsel. We balance solid fundraising experience with fresh perspectives and breakthrough insights.

Our professionals have that perfect mix of geek and engineer. They enjoy immersing themselves into your data to discover factors most likely to impact your success, including giving trends, demographics, geography, behaviors, and portfolio composition. Our metrical assessments will uncover gaps in the data, as well as provide opportunities for new or enhanced focus in areas impacting your success.

Annual Giving Program Data Analysis

DonorCast provides specialized services for annual giving programs. By teaming up with Bentz Whaley Flessner Annual Giving specialists, DonorCast provides you with an analysis of your annual giving program balanced with data and experience.

Our approach is to look beyond rules of thumb and look internally at your data. Our studies include summary analysis, custom survey research, and correlation of responses to actual giving behaviors.

KNOW

FORECAST THEIR POTENTIAL

Projection Analysis

DonorCast takes the guesswork out of managing development programs.

- What will gift officers yield in the next quarter?
In the next year?
- Are recent increases in the annual fund sustainable?
Were there anomalies in totals?
- Are we investing in the right areas to attain our campaign goal?

Cutting-edge forecasting techniques project the future performance of your programs, reveal factors that will contribute to your success, and identify the gaps needing attention. Through metrical analysis of program performance and portfolios, DonorCast will help you optimize your yields and make intelligent planning decisions.

FORECAST

REALIZE YOUR OWN

DonorCast will help you focus on your staff and methods with a metrical eye to increase giving and productivity. Bentz Whaley Flessner can help you design effective organizational approaches with:

- Comprehensive program assessments.
- Metrics-based feasibility studies.
- Systems analysis and decisions.

REALIZE



Donor Cast Counsel



Bentz Whaley Flessner is committed to enhancing the internal capabilities of your programs. Our professionals will provide guidance as you:

- Analyze your own constituency and programs.
- Build your own predictive models.
- Project your own goals.

DonorCast is uniquely able to provide counsel and custom training to meet your needs. We train beginners and statistics experts in applying analytics to fundraising. Counsel may include:

- Descriptive analytics techniques including profiling, clustering, and comparative analysis.
- Predictive modeling from basic correlation ranking to regression techniques, and beyond.
- Program analysis strategies.

We are fundraisers first. We know that statistics are only as good as their application. DonorCast Counsel starts with the application and equips you with the skills and tools to realize your potential.

REALIZE

Understanding your constituents, forecasting their potential, and integrating them into a working pipeline are central to building a strong development program. Our custom analytics solutions can help you realize your full fundraising potential.

WHY ORGANIZATIONS CHOOSE DONORCAST

- ⦿ DonorCast offers the most comprehensive analytics service for fundraising.
 - Descriptive analysis and custom research.
 - Predictive modeling.
 - Forecasting and gap analysis.
 - Training.
 - Program development.
- ⦿ Our professionals understand your people—the donors and prospects—behind every model. More than formulas and scores, we start with people and apply metrical solutions.
- ⦿ We are development professionals as well as statisticians. We bridge the gap between data and your people-driven success.
- ⦿ DonorCast uses diverse and sophisticated approaches. No two models or projections use the same formulas. Each one is custom designed for you.
- ⦿ We will not just give you scores; we will show you how we built your solutions. There is no need to mystify the process.

A NEW VISION

DonorCast represents the 21st century vision of Bentz Whaley Flessner. Our commitment to advancing philanthropy is grounded in employing better tools and techniques for you. DonorCast people-driven analytics embraces the true nature of your people and program. We challenge conventional wisdom with custom understanding because you and your people are anything but conventional.

A HISTORY OF INNOVATION

Bentz Whaley Flessner has long been a leader in the strategic analysis of data with cutting-edge prospecting techniques and program evaluation. The firm broke new ground in consulting when we chose to come alongside development professionals in campaign planning and operation rather than assuming campaign control. In so doing, the firm has always focused on long-term results for increasingly effective fundraising.

Breakthrough methodologies in prospect research promoted early use of on-line resources. ProspectSelect, database screening, introduced financial ratings and propensity ranking at levels new to the market. TeleSelect offered invaluable assistance to over-burdened fundraisers in the qualification of new prospects. Horizon cultivation and discovery concepts in prospect management were integrated by Bentz Whaley Flessner. Data mining as a part of BWF's ProspectSelect service played an early role in tailoring prospect lists to each institution's particular needs. Bentz Whaley Flessner has been at the front line in the study of the impact of new wealth and entrepreneurs and their impact on philanthropy.

The concept with which we started will never change. Bentz Whaley Flessner's goal is to empower you for long-term success. Pouring our experience, knowledge, and insights into institutional leadership is still our *modus operandi*.

Fundraising success starts with knowing.

Knowing your donors.

Knowing your prospects.

Knowing your programs.

Forecast their potential.

Realize your own.



BENTZ
WHALEY
FLESSNER

BENTZ WHALEY FLESSNER

7251 Ohms Lane
Minneapolis, MN 55439
952-921-0111

2461 South Clark Street
Suite 910
Arlington, VA 22202
703-413-5505

donorcast@bwf.com
www.donorcast.com
1-888-509-CAST