

RFM Meets K-Clustering

Two Distinct Models for Prospect Portfolio Decision-Making

Overall Findings

Our analysis determined that assigned prospects effectively covered major donors and the majority of annual giving, but attention was needed on mid-level donors for short-term growth. Further, extensive communication data pointed to potential long-term growth in developing a strategy based on patterns within interaction data.

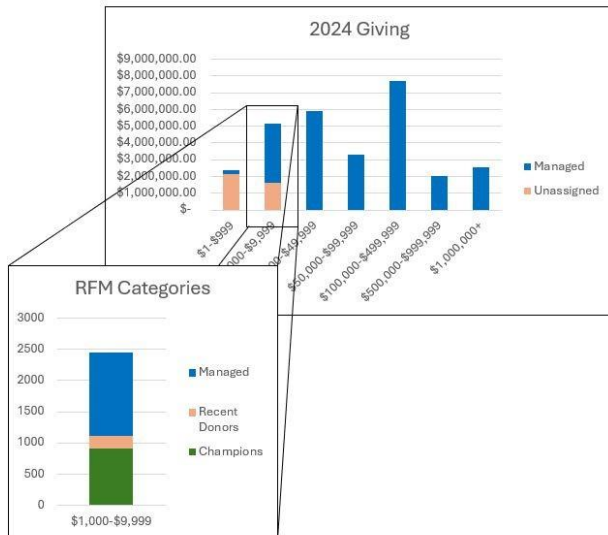
Treemap of Actionable RFM Segments



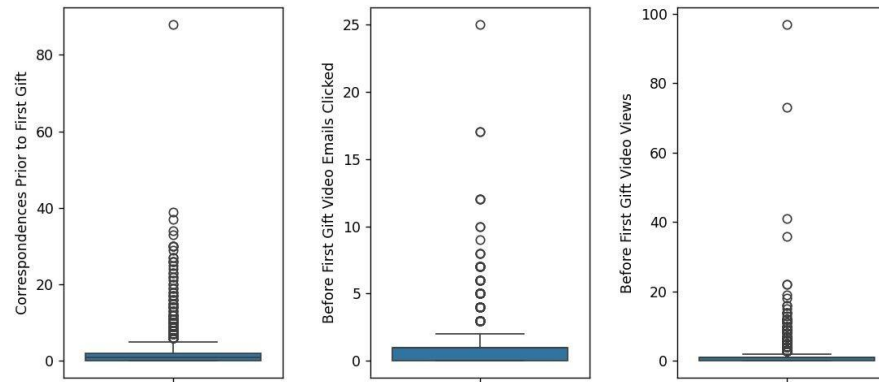
Recommendations

We recommend two different portfolio structures:
Portfolio One: A mid-level donor portfolio to lift the RFM “champions” with higher capacity from annual giving of \$1,000-\$10,000 to \$10,000+.
Portfolio Two: A long-term engagement portfolio that seeks to acquire high interaction prospects within the organization, with careful attention to those with higher capacity.

RFM Segmentation for 2024 Gift Band



Constituent Interaction Cluster Models



Cian Ó Cathasaigh | cian.ocathasaigh@ucdconnect.ie
Andrew Gutierrez | andrewjamesgutierrez@gmail.com
Bradley Richardson | bradrichardson@gmail.com