

# data science



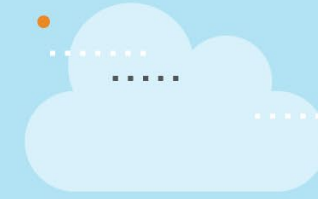
AUGUST 28 | INDIANAPOLIS, IN



# REGIONAL ROUNDUP

Adam Larck – OSF HealthCare Foundation





# DATA NORMALIZATION





# DATA NORMALIZATION/CLEANUP

- Finding States
  - Zip Codes – Normalizing zip codes and sorting for ease of use
  - Cities
  - Latitude/Longitude
- Out of 75,000 records, only 4 have no states by the end of the cleanup
- Regional Breakdown
  - Sorted the states into 5 regions for initial campaign focus





# DATA NORMALIZATION/CLEANUP

- Beware Misleading Data
  - Income data shouldn't be a large qualifier
    - Instead, looked at giving totals to create 3 levels: Major Giving/Mid-Level/Annual Fund
  - Homeowner/Gender Data
  - Giving Interest





# CAMPAIGN STRATEGY





# KEY FINDINGS

- Rural vs. Metropolitan
  - Almost 1/5 of major giving donors come from rural areas, with many having higher average gifts than those from metropolitan areas.
  - Young Donors
    - Younger major donors tend to give larger gifts on average
  - Blended Gifts
    - Blended gifts of pledges today and estate gifts later will be key to the long-term success of this campaign.





# CAMPAIGN GOALS

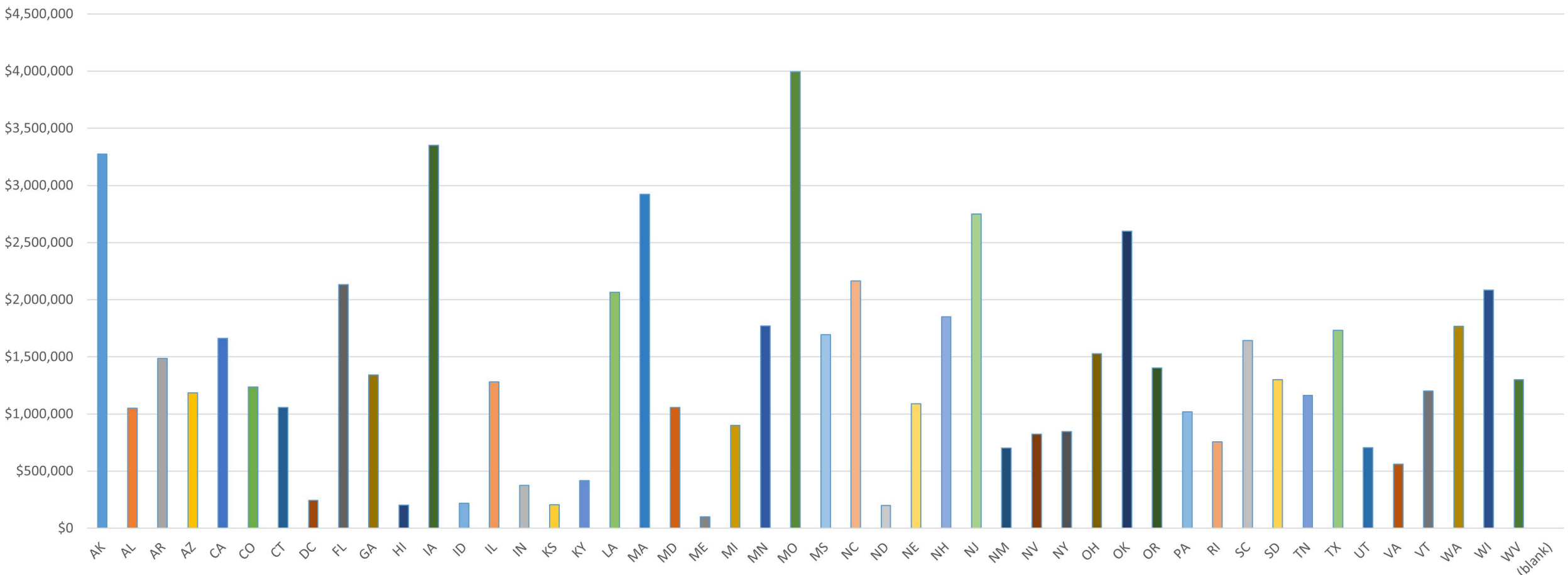
- Naming rights for \$2M gift based on past donations (would be largest gift to date in last 10 years).
- Major Gifts – 250 donors at \$100K minimum.
  - Total - \$25,000,000 projected
- Planned Gifts – 55 donors at \$50K minimum.
  - Total - \$2,750,000 projected
- Mid-Level Gifts – Southwest – 150 donors at \$2.25K minimum.
  - Total - \$337,500 projected
- Mid-Level Gifts – All other regions – 250 donors at \$2.5K minimum each.
  - Total - \$625,000 projected per region for a total of \$2,500,000
- Annual Fund Gifts – Metropolitan mailing – 12,200 donors at \$135 minimum.
  - Total - \$1,647,000 projected
- Annual Fund Gifts – Rural mailing – 800 donors at \$220 minimum.
  - Total - \$176,000 projected
- Total - \$32,410,500 projected





# MAJOR GIVING AVERAGES BY STATE

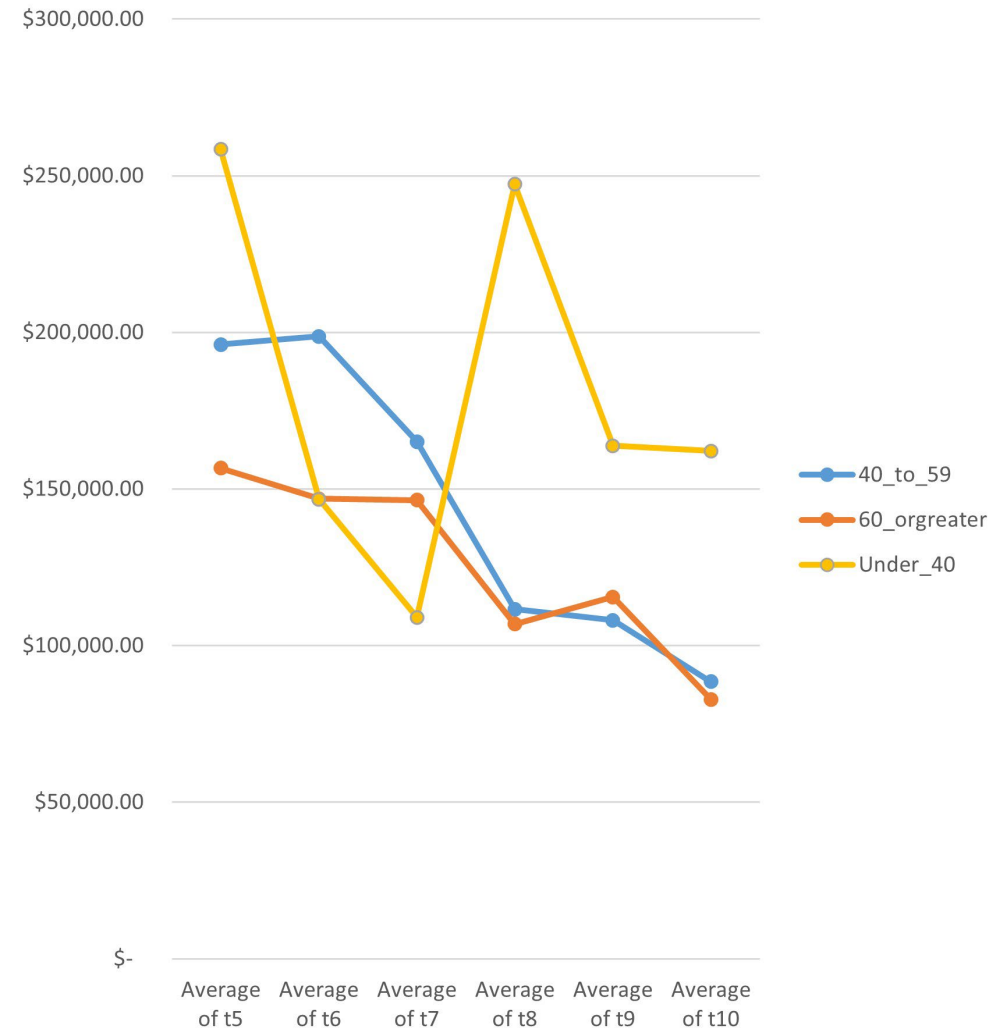
Major Gift State Averages





# MAJOR GIFT OFFICERS

- Declining major gifts
  - Dollar averages have declined by \$100K in the last six years.
- The Midwest, particularly Missouri and Iowa, should be a key starting point
- The Southeast region should also have a focus.
- 377 donors giving major gifts are married
- Initial focus by Major Gift Officers on younger donors.





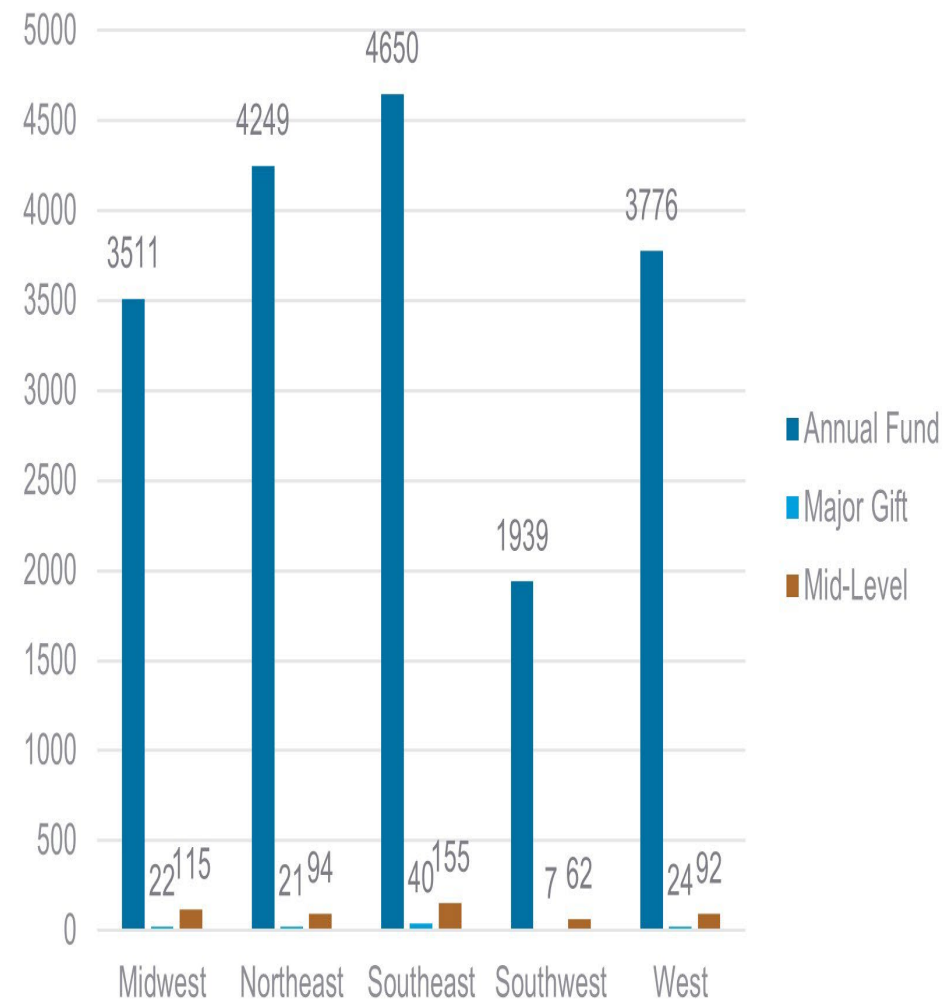
# MAJOR GIFT OFFICERS

- Goals
  - 250 donors at a minimum of \$100K. This is a slight increase for both donors and average gift amounts in the last year, totaling \$25M.
- Major Gifts
  - Each gift officer should try for at least one \$1.5M gift
  - Naming rights at \$2M



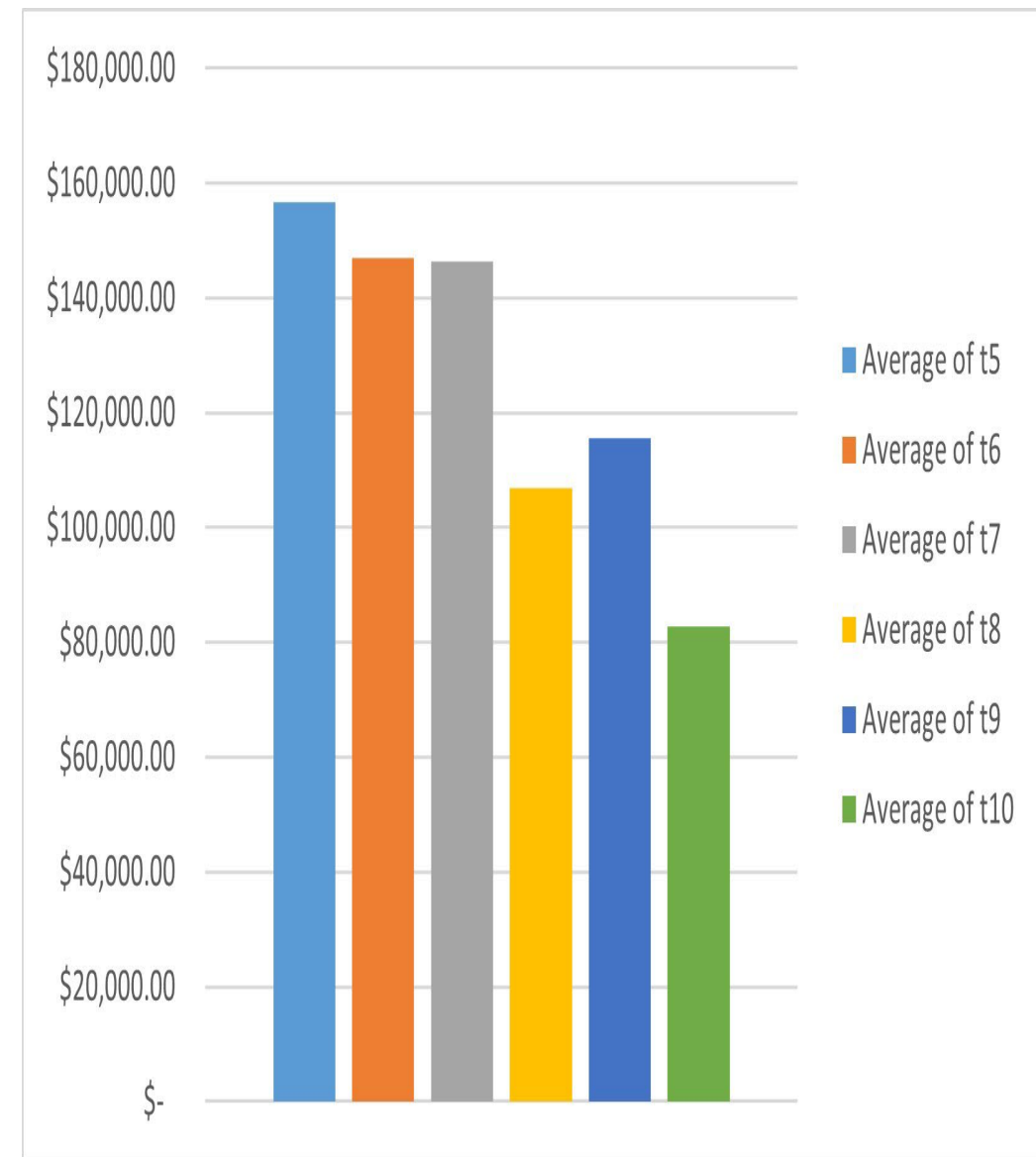
# PLANNED GIVING

- 18,757 aged 60+ donors.
  - Only 114 at a major gift level.
- Initial concentration should be in Southeast region, with 40 major gift donors aged 60+ in area.
- Targeted mailing for Southwest



# PLANNED GIVING

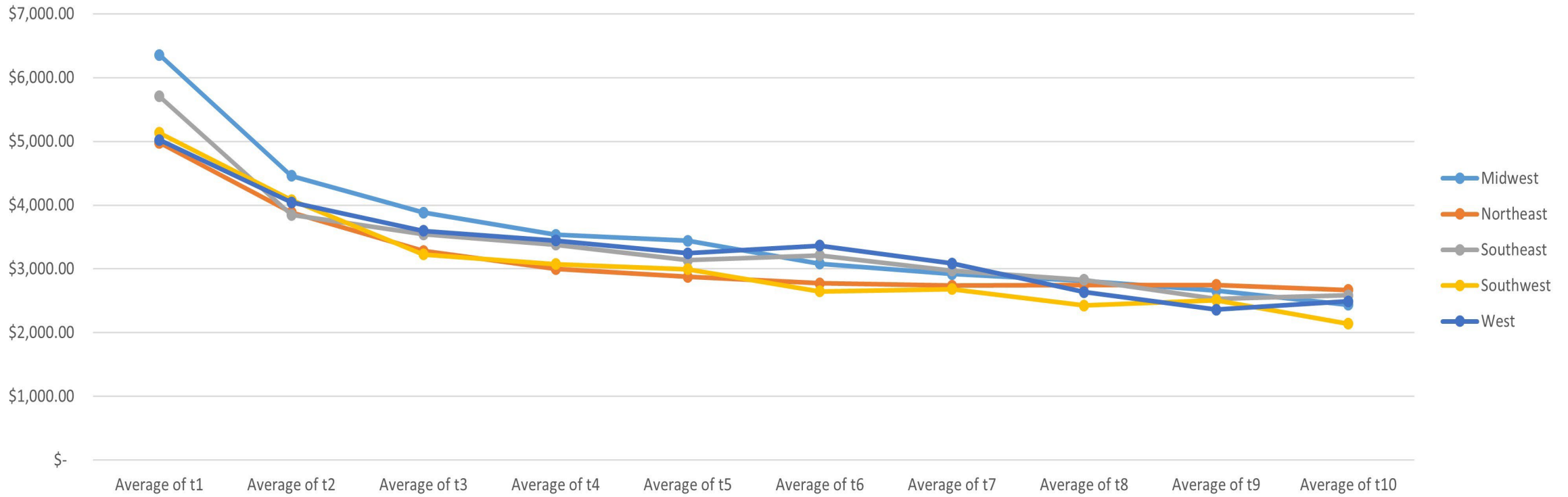
- Average gift size has been on the decline the last six years.
- Goals
  - 55 donors at an estimated minimum of \$50K per the trending path, totaling of \$2.75M.





# MID-LEVEL GIVING

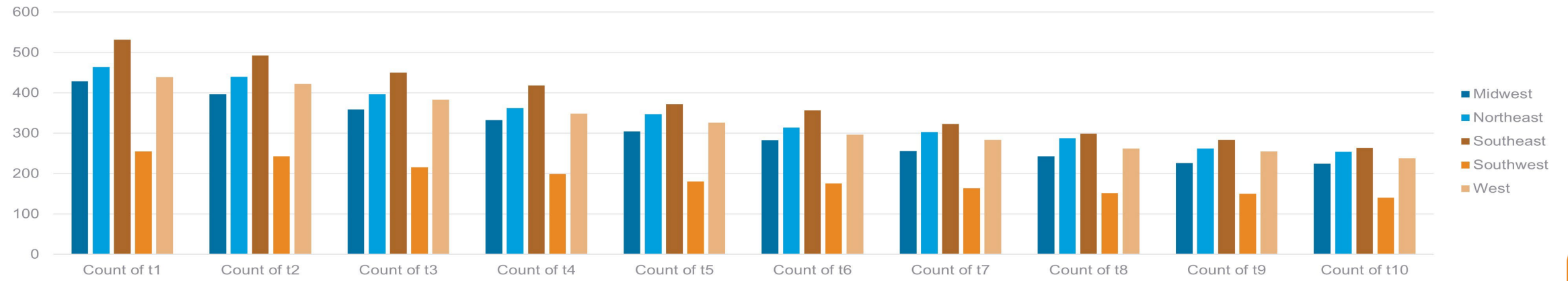
- Mid-level giving has been on a decline over the last 10 years.





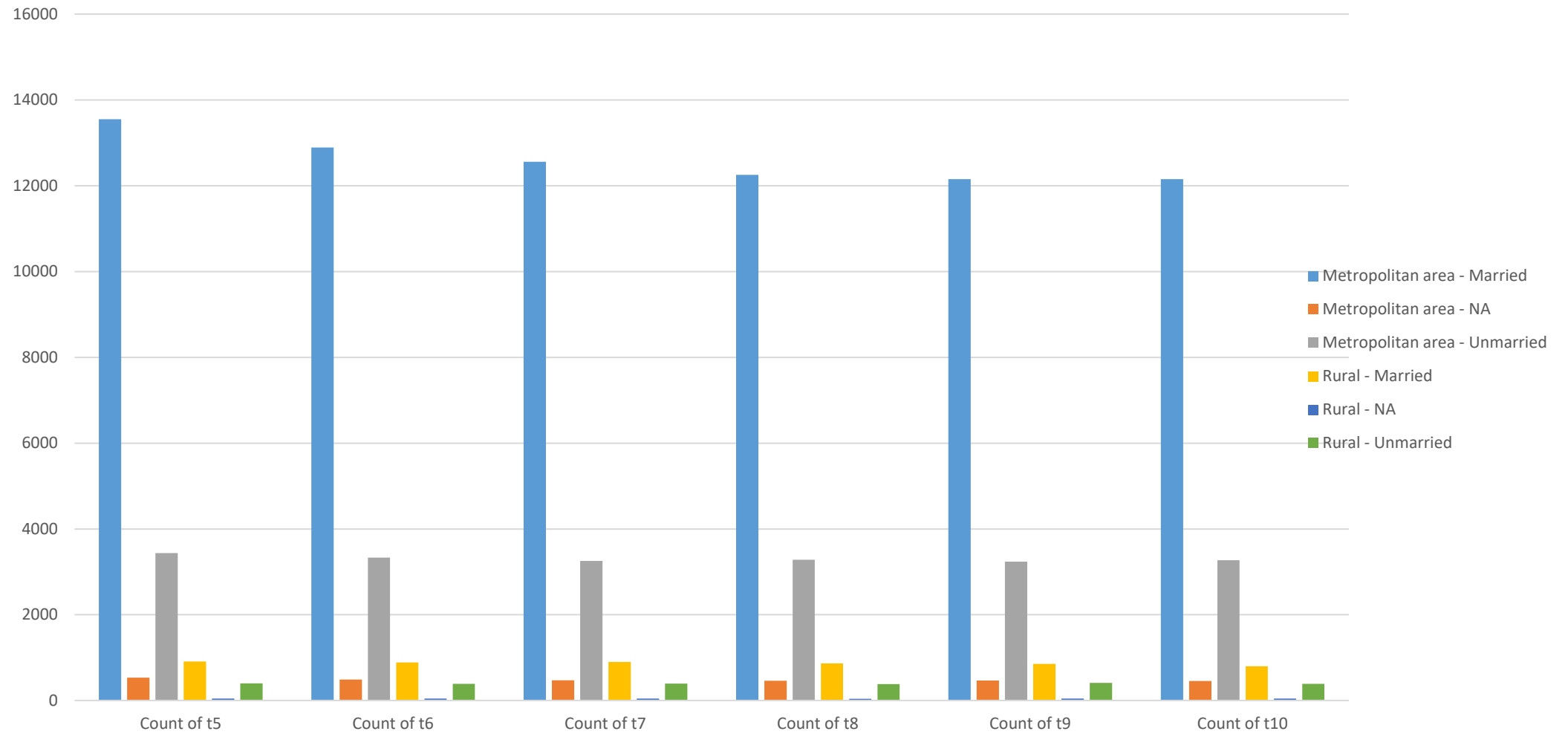
# MID-LEVEL GIVING

- Two-prong approach
  - Continued focus on Northeast
  - Reengaging lapsed donors in Midwest
- Goals
  - Southwest – 150 donors at \$2.25K, totaling \$337,500
  - Other regions – 250 donors at \$2.5K, totaling \$625,000





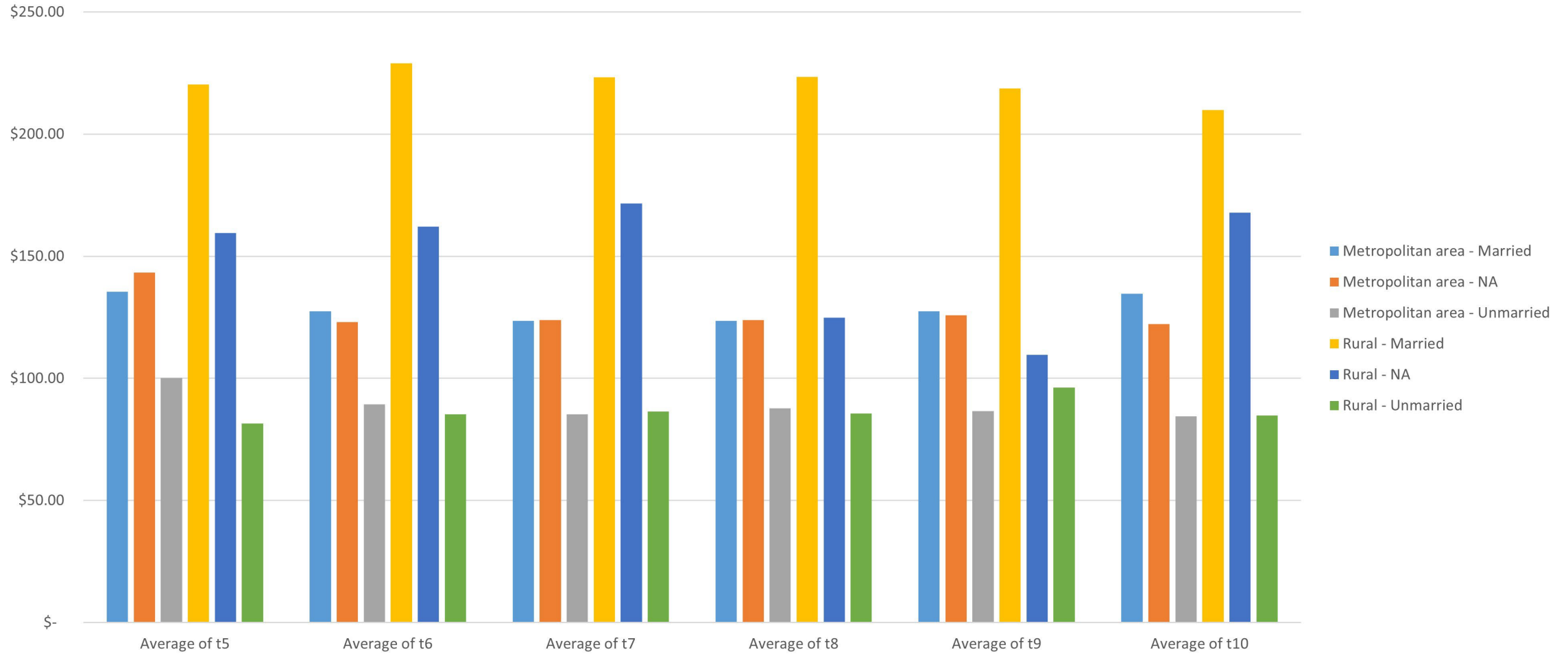
# ANNUAL FUND GIVING – DONORS IN AREAS







# ANNUAL FUND GIVING – AVERAGE GIFTS IN AREAS





# ANNUAL FUND GIVING

- Two initial targeted mailings:
  - A metropolitan mailing with a target of 12,200 donors for an average gift of \$135, totaling \$1,647,000.
  - A rural mailing with a target of 800 donors at \$220, totaling \$176,000.



THANK YOU!



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