

# Screening & Rating Your Database



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# Agenda

- Definitions
- Database Screening
- Peer Screening
- Donor & Prospect Rating
- Q&A



# Definitions

- Screening
- Database Screening
- Peer Screening
- Rating



# Database Screening

- Internal vs. External
- Types & Methods
  - Demographic
  - Modeling
  - Hard Assets
  - Dynamic
- Benefits & Drawbacks



# Database Screening – Choosing a Vendor

- Preliminary Considerations
  - Constituency
  - Goals & Priorities
  - Timeline
  - Budget
  - Support Structure



# Database Screening – Choosing a Vendor

- Shopping
  - List of Companies
  - References
  - Demonstrations
  - Free Trials
  - Submitting an RFP
  - Narrow Your Choices



# Database Screening – Choosing a Vendor

- Sample RFP Components
  - Technology Requirements
    - Submitting Data
    - Receiving Data
    - Running Reports
    - Number of Users
    - Custom Information
  - Minimums & Pricing
  - Timeline
  - Client Support & Training
  - Updates & Maintenance



# Database Screening – Other Considerations

- What Data is Sent?
  - Constituents
    - Prospects, Donors, Patients, Parents, Number
  - Attributes
    - Spouses, Business, SSN, Area of Interest
- Format of Data
- Return of Data
  - Integrated vs. Separate System
  - User Access
  - Training of Users
  - Staff Time



# Database Screening – Taking Delivery

- Technical Support
- Review of Data
- Processing Data
  - Confirmation of Results
  - Identifying Groups
  - Reports
  - Profiles
  - Tweaking Data
  - Tracking Use of Results



# Peer Screening

## ■ Types

- One-on-One
- Silent Review
- Group Discussion

## ■ Categories

- Geographic
- Profession
- Class or Age
- Social Circles
- Vendor-identified or Rated Prospects



# Peer Screening

- **Fund-raising Benefits**
  - New & Updated Information
  - Categorize & Prioritize Prospects
  - Subjective & Anecdotal Information
  - Fairly Easy to Implement
- **Friend-raising Benefits**
  - Connecting with Constituents
  - Helping Constituents Connect
  - Marketing & Excitement Factor
  - Develops Volunteer Network



# Peer Screening

## ■ Drawbacks

- Staff Time
- Cost
- Timeline
- Subjective Results
- Follow-through with Data & Volunteers



# Peer Screening – Preliminary Considerations

## ■ Goals

- Campaign Preparation, Project-Based, New Staff, Timing, Volunteer Ties
- Giving Capacity Ratings
- Information to Gather
- Number to Screen
- Number of Sessions
- Other Results



# Peer Screening – Preliminary Considerations

## ■ Resources

- Staff Size & Availability
- Volunteer Pool
- Potential Hosts
- Computer Capabilities & Support
- Timeline
- Budget



# Peer Screening – Preliminary Considerations

- Locations
- Printed Materials
  - Fact Sheet, Invitations, Stationery, Response Forms, Other Brochures
- Systems
  - List Production, Storage & Analysis of Results, Tracking Volunteers



# Peer Screening – Data Needs & Format

- Name (Maiden, Former, Spouse)
- Home & Business
- Degree or Other Category
- Donor vs. Prospect (Giving Level)
- Volunteer Solicitor
- Suggested Ask or Rating
- Project or Giving Interest



# Peer Screening – Process & Timeline

- Determine Groups to Screen
- Establish Plan (including utilizing data)
- Set Format, Number & Locations of Sessions
- Recruit Volunteers & Hosts
- Schedule Sessions; Make Site Arrangements
- Mail Invitations & Make Confirmation Calls
- Prepare Lists & Information Packets
- Set up Tracking Systems for Ratings



# Peer Screening – Process & Timeline

- Conduct Screening Sessions
- Send Thank-yous to Volunteers
- Compile & Analyze Data
- Prepare Reports; Evaluate Ratings Accuracy
- Distribute Reports to Appropriate Staff
- Execute Follow-up Plan
- Keep Volunteers Informed
- Reap the Benefits!



# Donor & Prospect Rating

- Definitions
- Benefits
  - Prioritizes Prospects & Donors
- Drawbacks
  - Can be Subjective
  - Resources
  - Updating; Continuing Process



# Donor & Prospect Rating

## ■ Sources

- Database Analysis
- Internal Committee Review
- Peer Screening Sessions
- Vendor Database Screening
- Surveys



# Donor & Prospect Rating

## ■ Methodology

- Giving Capability
- Giving History
- Interest & Involvement
- Weighted Scoring



# Donor & Prospect Rating

■ Examples



# Q&A

- Database Screening
- Peer Screening
- Donor & Prospect Rating