

Duke University's The Fuqua School of Business Creates a Routine Screening Process to Feed Monthly Prospect Pipeline

Duke University's The Fuqua School of Business needed a new approach to screening their database of 13,000 alumni records during the silent phase of their campaign. Rather than screen all at once and risk using outdated data and ratings during validation and cultivation, they opted to categorize the alumni by state and screen smaller groups on a monthly basis.

Creating a 'Hot List'

The process is “very helpful to maintain fresh data, provide new prospects and keep us on track,” says Tracey Martin, Prospect & Research Coordinator. “We take the screened data and prioritize the list by giving capacity, starting from the \$1M level down to \$100,000, briefly scanning the bottom of the list for anyone we know to have a higher capacity. Once we have segmented the list, we look at key features including the P2G (Propensity to Give) score, stock holdings and quality of match data. We overlay inclination ratings and deem those with a capacity over \$500,000 as our ‘hot list’.” Anyone with a giving capacity under \$100,000 is forwarded to the Central office for annual fund and reunion year development.

“In just a few months of routine screening, we have identified 1,182 new prospects. Our major gift officers are thrilled that we continue to replenish the pipelines with such strong constituents.”

—Tracey Martin, Prospect & Research Coordinator, Duke University's The Fuqua School of Business

A Sustainable Return on Investment

Martin has realized an impressive return from the first five states screened:

Screening Results	Number of Alumni Records
Data from five states	2,647
Number of records returned from screening	1,441
Number of records previously never rated	1,182 = new prospects
Number of records with an increased rating	125
Number of records with a decreased rating	134
Number of records with a rating over \$100K	937=65%

“Comments from gift officers are positive; they say that the routine screenings help them identify whom they should target first, meanwhile I can cut or lower codes on others,” notes Martin. The ongoing influx of data leads to:

- Swift delivery of records
- Data that is current and divided into “manageable chunks”
- Accurate information gathered from overlays such as NCOA (National Change of Address) that find “lost” alumni
- Valuable updates including employment, home and business addresses, stock and other biographical information

Duke University's The Fuqua School of Business has taken a proactive approach to wealth screening and uses monthly batch screenings to quickly validate top prospects and create routine workflows that feed development officers a fresh pipeline of new prospects on an ongoing basis. Each month, an average of 187 prospects with a major gift rating over \$100,000 are pushed to development officers—making cultivation a routine, actionable and manageable part of the advancement workflow.