

## Roanoke College Integrates WealthEngine Screening Data into Colleague Advancement to Streamline Workflow

Roanoke College has been a client of Datatel for more than 11 years; first using the Benefactor donor management system then upgrading to Colleague Advancement in 2008. At that time, Datatel and WealthEngine partnered to integrate WealthEngine screening data into Colleague Advancement which has since created a seamless integration and batch screening process that Roanoke can employ completely within their donor management system.

“The integration was very easy to implement,” says Robert Sebesta, Database Analyst at Roanoke College. “We screened our complete database of 20,000 donor and prospect records; including alumni, parents and former parents who have given within the past three years,” adds Carolyn Walter, Director of Development Research. Walter manages the integrated upload/download process between Colleague Advancement and WealthEngine that has streamlined Roanoke’s data management and created new, proactive research opportunities for development staff. The main advantage of the integration is to routinely refresh donor records to reflect current information (business and real estate changes, stock values, etc.) right in the donor database.

*“The P2G and other ratings gave me a good comparison and were pretty much on target with my own. WealthEngine identified new prospects who turned out to be really great prospects; as well, I found some on my own. Using the two in tandem made my job easier to recognize top prospects, quickly validate and execute an action plan for cultivation, rather than research each one by one.”*

—Carolyn Walter, Director of Development Research, Roanoke College

### Fresh Data Leads to New Workflow

Walter uses the screening results to target major gift donors. She first identifies those individuals who WealthEngine found to have promising P2G (Propensity to Give) and giving capacity scores. She then compares these scores to her own, pulls the matched list for immediate action and then begins researching any with a variance between the two scores. From Colleague Advancement, she can directly access live updates from WealthEngine’s online service.

Access to fresh data has built new workflows for:

- **Special Events**—When an alumni chapter plans an event, Walter creates an expected attendee list for the development officers who review and plan cultivation strategies.
- **Freshman Targeting**—Parent screenings of incoming freshman are now performed every spring. Walter shares the results with development officers prior to freshman arrival and they connect and cultivate during freshman “move in” and while parents are on campus.
- **Quick Updates**—For freshmen who registered after the spring parent screening, Walter conducts individual, online research for quick, current information. She also uses the online tool when she believes that a parent’s wealth may have changed.
- **New Campaigns**—Using the P2G score from the screening results, Walter identified the top freshman parent prospects and segmented them into groups for a direct mail campaign, sending personal invitations to major gift prospects to join a special parent council. Walter also sees the possibility of using the results for a planned giving appeal.
- **Reporting**—A valued feature to Walter, she can immediately refresh and apply live screening data to any report she prepares within Colleague Advancement. The reports feature combines the detail of the screening results with key internal data such as graduation year, school, etc., so all relevant data is concise and current.

### Shared Access Makes Cultivation Timely

Under the new system, every development officer has access to the screening data and can instantly view a prospect’s hard asset information, including analytics scores. Whether at their desk or on the road, the development officer can research, target, and track their best prospects from one secure database with reliability. Says Walter, “I have trained the development officers on how to interpret the data, giving them a base to get started—we particularly like to see board affiliation, political donations and other identifiers of connections and disposable wealth. The WealthEngine-Colleague Advancement integration is very helpful, very robust and makes the development officer’s research, as well as my own, more timely and effective.”