

St. John's College High School—

Engaging Alumni & Prospects to Drive Fundraising

ST. JOHN'S
College High School

When Philip Brach, Vice President for Institutional Advancement at St. John's College High School in Washington, DC, runs into a donor, he's likely to unholster his handheld device. Why? To check their giving capacity, of course. Brach has downloaded giving history and gift capacity rating for all 19,000 of St. John's donors into his PDA.

With a commitment to prospect research and help from technology, St. John's College High School raised over \$15.5 million in their last capital campaign, boosting their average capital gift commitments by four times the number of their previous campaign and receiving a "huge" number of first-time major gifts. Brach himself has closed four \$1M gifts from new donors, explaining, "These results are specifically due to better research on our part, and WealthEngine played a big role in that."



Data Analysis at the Foundation

Brach believes in looking at metrics and analytics to identify trends and gift potential. "I'm very data driven," he says, "I've done the math and know that prospect research and analytics pays off." To determine an inclination to give and an ask amount, he researches each prospect in WealthEngine's FindWealth Online and uses three figures; his own RFM score, the WealthEngine gift capacity rating and real estate valuation. Brach uses the RFM to code St. John's donor database so each donor and prospect is clearly defined for fundraising efforts. RFM is a statistical formula that identifies:

- Recency—how recently the last gift was given
- Frequency—how frequently the donor gives
- Monetary—how much the donor has given in total

Brach then uses WealthEngine's gift capacity rating to determine ask amounts. When he first considered adding the gift capacity rating to his model, he tested WealthEngine's gift capacity levels against his own data by reviewing the capital and annual gift histories for his top 30 donors. "I found the results to be unbelievably accurate, especially when you base it against the range of donor/prospect engagement with the school. The gift capacity rating was within 1%-5% of my top donors' average annual gift and 5-10% within their capital campaign gift. The ratings are proven and I use them to ensure we are always on target."

St. John's College High School's leadership campaign phase (ask of \$25,000 or more) has delivered strong results.

Total leadership commitments: 150 gifts

First time capital gifts: 97 gifts totaling \$2.7M

Repeat capital campaign donors: 53 gifts totaling \$5.4M, nearly 60% of which are higher amounts

"The use of WealthEngine contributed significantly to our ability to identify new leadership gifts and to seek higher amounts from existing donors."

—Phil Brach, Vice President for Institutional Advancement

For example, WealthEngine identified one alumnus who had given \$100,000 in the previous capital campaign and had verbally shared that he would give \$150,000 in the current campaign. With the data on his side, Brach knew that the donor had a greater gift capacity and St. John's made a higher ask securing a gift of \$500,000. The donor placed two conditions on the gift; 1) St. John's was to acknowledge the gift under both his and his wife's names and 2) Brach had to show the donor how he had been identified as a major gift prospect and how he formulated the seemingly high ask amount. Brach introduced the donor to the WealthEngine data where he was impressed to see even his boat ownership noted. The donor also went on to chair the campaign.

Brach's third ingredient for evaluating donors and prospects is real estate. "For the Washington, DC area, I've found that anyone who has more than \$400,000 in real estate, as well as strong RFM and gift capacity scores, is likely to have something more to offer and we can proceed with the assurance that the analytics are on target," explains Brach. "For those under that threshold, we are careful not to underestimate their potential and will conduct more research."

Cultivating Parents Early and Often

Brach follows a multi-touch approach, using every opportunity to engage parents early and often. He notes, "We conduct freshman parent screenings through WealthEngine with our results posted in FindWealth Online History. The screenings help us to identify potential so we can start engaging parents during the summer."

Brach capitalizes on every opportunity to collect prospect data, including open houses, special events, even family networks. Says Brach, "This is critical as we've found that the gift level of parents who are alumni and have children attending St. John's are four times higher than alumni that do not send their children to the school."

Cultivation after special events also yields a high return for St. John's. "I've looked at donations from event attendees one year before the event and one year after. The average increase is 21%," adds Brach.

Tips for Engaging Donors, Prospects and Alumni

St. John's success involves using prospect research as the foundation of their fundraising strategy. Some of Brach's suggestions for staying updated on donors and prospects, as well as engaging alumni, include:

- **Set up an email tracking system.** Resources such as Google Alerts and Dialog NewsRoom can help track targets. Also keep your eye on local business journals which can provide timely information on donors and alumni, such as a prospect who may have recently sold their business or a donor who received a special recognition or award.
- **Use social networking resources.** Facebook, LinkedIn and other social networking sites can help you research and confirm biographical information on prospects. Information and photographs on family, friends and interests can provide valuable insight and conversation starters.
- **Look for unique opportunities to create affinity with a department or program.** St. John's sent a memorial solicitation letter to all 300 students who played football under a long-time, much loved coach.
- **Use prospect research to determine the leadership of class reunions.** Brach uses WealthEngine to determine the gift capacity of class alumni and invites the top 5-10 prospects to serve on a class reunion committee.

With the right combination of WealthEngine data and analytics, St. John's High School has created a strategy for segmenting and prioritizing donors and prospects for fundraising initiatives, as well as pinpointing highly accurate ask amounts. Then, they leverage every opportunity to engage their constituents—donors, prospects and alumni—to ensure their fundraising is on a solid path for continued growth.

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