

Trinity University

Applies Predictive Modeling to Uncover Capacity and Affinity for Major Gift Prospects



Trinity University is one of the nation's leading private, liberal arts universities, with 2,600 students on its San Antonio, Texas campus. Clint Shipp, Ph.D., the Senior Director at Trinity, was brought on board to formalize projects and processes as a capital campaign was contemplated. "As a prelude to a feasibility study, we wanted to further analyze our database to gain a thorough understanding of our constituents' ability and propensity to give," says Shipp.

Gauging Propensity to Give to the University

Shipp knows that screening data provides clues to someone's philanthropic propensity, but he and other members of the leadership at Trinity also knew they needed to properly gauge propensity to give to Trinity. So they opted to do a complete screening of their roughly 57,000-record Datatel Colleague Advancement database, and worked with WealthEngine to build a custom major gift model. The model uses valuable relational, transactional, and demographic information stored within Colleague Advancement on their alumni, parents, donors and friends. This data is then coupled with extensive wealth, asset, lifestyle and business data provided by WealthEngine's screening. "Modeling answers a number of questions beyond what a wealth screening offers—the results from a screening show propensity to give, but that's not specific to your organization so you don't always know that they're going to give to your University over other causes. That's the importance of custom modeling; it uses our data and tells us who has an affinity to give to Trinity," explains Shipp.

Shipp and the advancement services team at Trinity will use the results of their screening and modeling to form the basis of a feasibility study for their potential campaign, specifically to determine the most realistic and achievable campaign goal.

Results Queue Up Prospect Pipelines

Shipp and his team have already put the valuable information provided by the screening and modeling to work by creating a prospect pipeline and new leads program to serve the major gifts and annual fund programs. The team has used the results of the custom major gifts model to identify the top 10% of scorers who represent the individuals in the constituent base with the greatest propensity to give a gift of \$10,000 or more to the University. They segmented these best prospects into groups according to their capacity to give. This uncovered a huge opportunity. Of the roughly 5,700 in Decile

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10, only 12% had previously been assigned and were actively under management. Of the remaining 88%, 85% are donors, and some have given large gifts in prior years.

“We discovered a big gap,” explains Shipp, “Through our modeling, we realized there is great potential within our database as we identified many individuals who weren’t on our radar but had high propensity to give, and we saw there were many previous givers we hadn’t continued stewardship with. The project has identified a lot of people with high potential – I have no doubt it will pay for itself within a very short time.”

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Trinity University’s Top 10% of 56,923 Records Screened

Current Assignments	New Assignments based on WealthEngine P2G and Capacity Scores				
	Further Research Needed	Major Giving Track	Annual Fund Leadership Track	Low Priority	Total
Major Giving	133	14	229	38	414
Annual Fund Leadership	46	4	223	66	339
% Currently Assigned	24%	28%	12%	9%	13%
New Prospects	571	47	3,271	1,049	4,938
% New Prospects	76%	72%	88%	91%	87%
Grand Total	750	65	3723	1153	5691

Those constituents in the top 10% who are categorized as ‘further research needed’ (750 individuals) are being quickly qualified for assignment to gift officers for new discovery calls. As each prospect is reviewed, one of three things can happen:

- » They are qualified at a major gift level (\$25,000 or more over a five-year period)
- » They are qualified as a leadership prospect for the annual fund
- » They are removed from consideration as a prospect

The research team plans to identify five new leads for each of five gift officers each month. Shipp anticipates that the subsequent discovery calls will result in more substantive conversations and additional appointments, as compared to discovery calls based on leads not selected from the major gift model propensity to give score. The annual fund team is currently developing plans to systematically and strategically target their prospects with a solid implementation plan geared towards action. “One of the best outcomes from modeling is that no time is wasted. You uncover your best prospects—many who you may not have identified yourself—and can begin cultivation and solicitation across different programs with the assurance of data-driven research.”

Trinity University has taken the steps needed to fully understand and leverage their constituent database. The steps they are taking today to capture the capacity and propensity of their constituents, as well as to begin cultivating those with the highest scores, will position them for success as they consider launching a campaign in the coming year.