

# An Overview of Services

for Nonprofit Organizations

**Target Analytics®**

# Target Analytics<sup>®</sup>

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## About Blackbaud

Serving the nonprofit and education sectors for 30 years, Blackbaud (NASDAQ: BLKB) combines technology and expertise to help organizations achieve their missions. Blackbaud works with more than 28,000 customers in over 60 countries that support higher education, healthcare, human services, arts and culture, faith, the environment, independent K–12 education, animal welfare and other charitable causes. The company offers a full spectrum of cloud-based and on-premise software solutions and related services for organizations of all sizes including: fundraising, eMarketing, advocacy, constituent relationship management (CRM), financial management, payment services, analytics and vertical-specific solutions. Using Blackbaud technology, these organizations raise more than \$100 billion each year. Recognized as a top company by *Forbes*, *InformationWeek*, and *Software Magazine* and honored by Best Places to Work, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, the Netherlands and the United Kingdom. For more information, visit [www.blackbaud.com](http://www.blackbaud.com).

# Target Analytics® Overview

Using a mix of data, insights, modeling, and industry knowledge, Target Analytics delivers strategies and results for nonprofits.

Target Analytics, a division of Blackbaud, delivers data-driven, collaborative solutions to help not-for-profit organizations increase support from their supporters and further their missions. Target Analytics offers the only comprehensive analytics solution for data management, donor acquisition and cultivation, prospect research, and collaborative peer benchmarking, as well as access to exclusive data and fundraising experts.

Target Analytics offers solutions for every stage of the donor lifecycle. You can rely on Target Analytics' decades of experience to identify best prospects, retain loyal supporters, assess donor performance, and measure your success.

Headquartered in Charleston, SC with offices in Cambridge, MA, and Miami, FL, Target Analytics is proud to work with nearly 8,000 organizations across the globe, helping our clients reach and surpass their fundraising goals.

## Fundraising solutions for all types of nonprofits for all stages of the donor lifecycle.

Whether you are looking to verify wealth for an individual or send a million direct mail pieces or just find duplicate records in your database, Target Analytics is here to help. What can we help you accomplish today?

- **Maintain Constituent Data Records .....Section I**
- **Research Major Donors & Prospects .....Section II**
- **Optimize Direct Marketing Campaigns .....Section III**
- **Performance Analysis & Benchmarking .....Section IV**

## I. Data Enrichment Services

To ensure that your database is ready for any analytics, the first step is to optimize the information you already have: first and foremost, your donor contact information. Even for online-only fundraisers, donor names and addresses are critical—nearly all data sources require a name and address to match data to your donor records. Some data (like social media profiles or influence segments) are connected only via email address, but that’s an exception for the most part. You should consider it a hard-and-fast rule that if you don’t have a high-quality name and address for a donor, it will be nearly impossible to append or derive any kind of value-add insight about that person.

There are a series of best-practice techniques which are essentially considered “table stakes” for nonprofits; in other words, they are processes you need to implement before investing in analytics, or even sending fundraising communications:

- **Address Standardization** – Validating addresses against USPS standards ensures accurate matching and delivery
- **National Change of Address (NCOA)** – The USPS requires mailers process addresses through NCOA at least every 95 days to maintain postal discount rates
- **Proprietary Change of Address (PCOA)** – Catching those that do not complete NCOA forms, this process gathers change of address notifications from banks, credit cards, and utility companies
- **Address Appends** – Make sure addresses are completely deliverable to your donor by adding specific sorting information such as apartments, suites, and routing numbers
- **Deceased Suppressions** – This process removes those supporters who have recently passed away
- **Duplicate Removal** – Once data has been standardized and updated, removing duplicates allows better donor management, analytics segmentation and optimizes campaigns.

	Data Quality Scorecard	Enterprise Data Quality	AddressAccelerator	Contact Information Appends	SupporterView	Blackbaud Persistent Key
How good is my data, and what is it costing me?	●					
What are my options for improving my data quality?	●					
How do I consistently keep my data accurate, and up to date?		●				
How can I keep my data USPS-compliant, and ready for analytics?		●				
How can I keep bad data from getting into the database?			●			
How can I fill gaps in my contact information?				●		
How can I fill gaps in my donor insight?					●	
Where can I find data for advanced segmentation & modeling?					●	
How can I identify unique constituents in my database?						●
Can I cohesively link my disparate databases and data inputs?						●

## Enterprise Data Quality

The Enterprise Data Quality package was designed to help nonprofits cost-effectively enhance the overall quality of their database. By minimizing postal costs, increasing campaign response rates, finding lost donors, and optimizing data for further analytics, organizations are able to increase revenue while decreasing wasted resource costs. The Enterprise Data Quality solution brings together the core data cleaning solutions to ensure up-to-date constituent contact information.

- National Change of Address (NCOA)
- Address Standardization (CASS)
- Deceased Donor Identification
- Proprietary Change of Address (PCOA)
- Advanced Address Correction (AAC)

## AddressAccelerator™

AddressAccelerator is a software package designed to streamline and quicken entry of constituent data into The Raiser's Edge or Blackbaud CRM databases, while at the same time guaranteeing address quality. The service checks each address record against US Postal Service sources as it is entered by the user; it will auto-complete entries to save time, and will also identify & correct problems such as typos or missing information.

The software works in real-time during data entry, but can also be executed in batch mode, to validate & correct existing addresses that have previously been added to the database. This additional screening software is particularly important for organizations with higher staff turnover and rotating data entry roles from volunteers and event staff.

## Contact Information Appends

Contact Appends expand coverage of existing house file contact information to enable connection with donors via multiple channels. As donors interact with organizations through different channels, overall engagement increases and generally as does level of support. With donors living in a multi-channel world, charitable organizations must also expand their communication strategies to meet the donor where she is most likely to be receptive to an appeal. Contact Information Appends connect additional attributes to create a full donor profile.

- **PhoneFinder™** – Appends new verified phone numbers and flags invalid from current numbers.
- **EmailFinder™** – Appends email addresses based on name and mailing address. Also includes mandatory opt-out email send before new email addresses are able to be used.
- **SocialMediaFinder** – Searches for social media profiles from the top social networks, returns profiles URLs and links to profile photos that can be imported into CRM systems.

### The Need for Enhanced Data Services

In a 2016 analysis, Target Analytics found that:

**17% of all records** in a nonprofit CRM were un-mailable,

Nearly **7% of addresses** were out of date,

**Over 40%** of records are missing phone numbers,

**Over 50%** of records are missing email addresses.

## SupporterView

SupporterView is a 235 million record referential database containing 600+ of appendable data attributes - each of which helps describe and profile philanthropic contributors. It's commonly used by nonprofits to better understand their constituents, and then optimize donor interactions through improved targeting and messaging. The data includes demographics, behaviors and interests, summarized credit, lifestyle, affluence, and geographic information – all of which is linked to US individuals & households. The data covers over 18% of adults in the entire US, and is updated quarterly.

SupporterView attributes are selected uniquely for each organization and the particular goals for the organization. A Target Analytics representative will be able to work with you to figure out what attributes are best suited for your needs, how to read the findings, and offer recommendations on use cases from the information returned.

## Data Quality Scorecards

Not sure where to start? Target Analytics will run a complimentary Data Quality Scorecard. This easy-to-read snapshot of a fundraising database reviews client data across **seven key metrics** – then rolls those findings up into an overall rating score to determine the current health and efficiency of the database.

Find out how you compare to other organizations for metrics such as number of deceased records, invalid addresses, duplicates, and more. Results are then tied to sample mail costs to calculate possible financial impact statements to help highlight the need for data cleaning practices.

## Blackbaud Persistent Key

Identify, and confirm, unique constituent records across your entire database. With Blackbaud Persistent Key, you will have an on-going process to manage new, old, and updated records. Additionally, persistent key processing will enable consistent links between disparate databases—no matter what software platforms are used. With persistent key processing, you will be able to better manage tasks such as;

- Connecting multiple chapter or affiliate databases
- Linking online and offline giving sources
- Streamlining your record count before starting a database migration
- Accurately manage your full individual and household constituent records

## II. Prospect Research & Major Giving Modeling

How many prospects do you have at any given time? A few dozen? Hundreds, perhaps, or even thousands?  
 How well do you know each of them? How likely are they to support your organization?  
 What kind and size of donation should you ask them for?

Prospect research is your key to tapping the hidden wealth in your database. Each prospect offers unique potential as a donor, and improving your knowledge of each individual gives you an advantage over other organizations competing for their donations. Nonprofits like yours need a fast, dependable way to screen prospects — individually or as a group — to identify the best prospects, cultivate wealthy donors, and ask for the right amount at the right time.

*We've always used analytics to drive our decisions in the past, but our major gift team was very pleased with the scoring and approach with Target Analytics, which helped further focus our efforts.*  
 — Connie Schlundt,  
 Director of Individual Partnerships,  
 Second Harvest Heartland

A good prospect research application - such as **ResearchPoint™** - can save you time and free up your staff resources to analyze information, target the correct people, and build those critical, person-to-person relationships.

Our solutions offer the most comprehensive, cost-effective set available — ones you can immediately put to use for quick and meaningful results. The solutions includes **ProspectPoint®** for prospect identification and **WealthPoint®** for wealth ratings. We also offer **Fundraising Essentials** and **Target Analytics Affluence** — additional tools to help you get to know your prospects fully, quickly, and easily.

	ResearchPoint Software	ProspectPoint Modeling	WealthPoint Screening	Fundraising Essentials	Target Analytics Affluence
Which prospects have capacity, and are worth our time and energy?	●				
What is the breakdown of this individual's wealth? What are the details?	●				
Who are the elite, top-of-the-pyramid prospects we need to know?		●			
How much should we ask them for? Are we leaving money on the table?		●			
Can I screen my donors and get results back the same day?			●		
Can I get a simpler, more summarized, and easier to use version of wealth?			●		
How can we quickly group our donors into major & annual giving segments?				●	
Is there an entry-level analytics package that we can start with?				●	
How can I easily sort through my constituents based on wealth & assets?					●
Is there a way to profile by donors based on giving habits and life-stages?					●

## ResearchPoint™

### What Is ResearchPoint?

ResearchPoint combines the industry's best, most comprehensive individual wealth and philanthropic insights under one umbrella, providing users with an easy-to-navigate platform and custom user experience to build a successful fundraising roadmap. Seamlessly integrate constituent data, navigate deeper into each individual's capacity and inclination to give, and access custom-built modeling solutions to identify your best prospects and most likely supporters. From beginning to end, ResearchPoint leverages the best prospect data available to drive results and help grow your mission.

With ResearchPoint, everyone — from prospect researchers to development officers and directors — will be able to turn simple data into actionable information to make better strategic decisions. You'll have trustworthy, complete information on new and existing prospects, resulting in better and more successful development plans.

### How does ResearchPoint work?

With built-in dashboards to analyze results and profile reporting to highlight major gift candidates, prospect researching has never been this efficient. ResearchPoint takes the time and effort of prospect researching away from the organization so you can focus on what really matters — engaging and cultivating with top-tier prospects.

Import existing constituent data into ResearchPoint directly from your fundraising database to begin building your major giver prospect list. **Search, append, and build new prospect lists** for your portfolios through access to the Target Analytics pre-matched prospecting database — find individuals based on parameters such as; contact information, geographic location, total wealth, real estate and business property, and philanthropic giving. Users also have the flexibility to build custom research lists to organize and segment individuals prior to evaluation. ResearchPoint boasts the most comprehensive wealth and philanthropic insights in the industry, which enable customers to identify the supporters through uncovering individual wealth, capacity, hard asset information, likelihood scores and ratings, philanthropic connections, and affinities.

Philanthropic giving is screened from NOZA™, the world's largest searchable database of public giving history. Now, housing over **125 million unique gifts** delivered through ResearchPoint to enable prospect qualification, research, and building lists of new potential supporters.

## Why ResearchPoint?

### Easy System Integration

Seamlessly connect with your Blackbaud database

### Expanded Gift Searches

Source from NOZA, the largest searchable database of philanthropic giving history

### Confirmed Wealth Analysis

Find, verify, and connect wealth and capacity information for prospects

## Fundraising Essentials

What Is Fundraising Essentials?

Fundraising Essentials applies advanced analytics to simplify an organization’s fundraising approach and drive increased performance. The process analyzes constituent profiles and giving history to accomplish 3 objectives – it segments your constituents into **identified giving programs**, recommends **a next-ask amount**, and identifies each individual’s **total assets**. This combination empowers an organization to realize quick-wins, and efficiently invest resources where they will produce the most gains.

How does Fundraising Essentials work?

To begin the discovery process, Target Analytics conducts an extensive review of the organization’s giving history against a mix of external data to find and match each donor’s likelihood to give an Annual or Major gift. Once program segmentation is completed, each donor’s giving capacity is calculated through an analysis of their financial, demographic, behavioral and lifestyle attributes; this data is used to identify a next-ask amount that aligns with each donor’s ability and potential to give.

The third level of insights provides an additional report of each donor’s total identified assets – this is a valuable component in the development state of fundraising, as it helps to pinpoint who an organization should engage with first and with what level of ask.

## WealthPoint® Screening

What is WealthPoint?

With WealthPoint Rating, you get a straightforward rank for each prospect when publicly available wealth data is found. Constituents are classified by easy-to-implement wealth ratings that scale from A through G. Instead of just scanning lists of names, WealthPoint Rating can help you determine next steps for donor contact strategies quickly and easily.

How does WealthPoint work?

You provide us with an electronic copy of your data and let our team of experienced fundraising and prospect research consultants do the work for you! We’ll cross-reference your data against multiple data sources, searching for assets and other wealth indicators, to identify your wealthiest and most philanthropic constituents. We’ll provide a broad array of information about these individuals, including biographical information, employment data, income and assets, real estate and financial holdings, charitable gifts, and philanthropic interests and associations. The list will also be returned with a simple rating score to allow you to quickly scan and sort prospects focusing on the top constituents with capacity to give.

### WealthPoint® Results

First Name	Last Name	Address	City	ST	ZIP	WP Rating	Last Gift Date	Last Gift Amount	Total Amount
Joseph	Diestra	124 East Bay	Charleston	SC	29401	<b>A</b>	11/19/2012	\$450	\$75,000
Robert	Hernandez	845 Heinz St	Atlanta	GA	30303	<b>B</b>	12/25/2009	\$100	\$12,000
Lane	Gunn	47 Cypress St	Phoenix	AZ	85004	<b>C</b>	-	-	-

## ProspectPoint®

What is ProspectPoint?

The ProspectPoint modeling suite helps an organization to identify and target its best fundraising prospects, providing the insights needed to optimize major and planned giving programs, overhaul annual fund initiatives, and perform strategic campaign planning. ProspectPoint empowers fundraisers to make faster, more informed, and more effective decisions; our framework leverage **over 1,000 distinct data points** to identify who the organization should target, which programs with which to target them, and how much those individuals are likely to contribute.

How does ProspectPoint work?

Target Analytics utilizes a combination of multiple data perspectives to inform the modeling effort – these include the supporter giving history recorded from your fundraising database, supporter giving to other organizations (collected by Target Analytics), and thousands of wealth & demographic attributes integrated from multiple outside sources. This mix of data assets provides the organization with a 3-dimensional view of each supporter, expanding beyond their historical relationship with the organization, taking into account not only the donor's overall philanthropic tendencies, but also factors such as their life-stage, wealth liquidity, and giving capacity.

## Target Analytics Affluence

Target Analytics Affluence provides your organization the ability to accurately identify wealth, income, and net worth of your constituents based on a wide variety of data—creating the industry's most expansive wealth profiling solution. Access profile and wealth insights needed to segment and prioritize your organization's database. A great complement to models and wealth screening, Target Analytics Affluence provides you data that is often difficult to find.

Ratings are comprised of thirteen distinct segments to define constituent giving habits and life stages. Additionally, household-level wealth attributes are appended to each record to show identified income, discretionary spending, net worth, and investments.

## How can Fundraising Models from Target Analytics help your organization?

A vital strategy of successful prospecting and segmentation is custom modeling. Custom fundraising models identify your most likely prospects for giving a gift specifically to your organization. The right statistical model can help your organization acquire new donors or analyze each individual in your database — not only those whose wealth profiles or giving histories suggests they are good prospects.

When you have a complete picture of who is most likely to give, plus a target ask amount range and which kind of appeal you should use for each individual, you won't waste time and money pursuing the wrong prospects. When you're ready to get started, we'll help you implement with ease. Our top-notch Consulting Services team understands the needs of nonprofit organizations and will work closely with you to make sure you get the most out of your fundraising efforts.

### III. Direct Marketing

Whether you're executing a direct mail campaign, kicking off program budgeting, or thinking about a new communication strategy, Target Analytics' direct response marketing solutions can ensure the success of your organization's stewardship and fundraising plans. Donor engagement tracking, channel preferences, and responder models allow nonprofits to optimize end-to-end direct marketing program strategies — from new donor acquisition lists to long-term cultivation to multichannel outreach.

Direct marketing insights are powered by the expansive Target Cooperative Database of philanthropic giving. Dating back to 1997, the Target Coop Database is the oldest and largest nonprofit cooperative of giving history in the market. Currently over 1,400 organizations participate, aggregating over 4 billion giving transactions, and profiles covering 85 million US households.

	Target Indicators	Donor Acquisition Lists	Target Tag Models	Loyalty Insights	Connection360
How can we make our direct mail, telemarketing, and email more effective?	●				
Who are the best candidates for a sustainer ask?	●				
How do we find new prospects that are likely to give?		●			
How do we find new prospects that have a history of high dollar gifts?		●			
How can we cost-effectively target our best donors?			●		
Which of our donors are likely to respond to a future campaign?			●		
How can we distinguish between loyal donors, and single-gift givers?				●	
Which of our donors are giving to other nonprofits? And how often?				●	
How do we increase our brand presence, without over-mailing?					●

#### Target Indicators

Donors live in a multi-channel world, and fundraisers should use multiple contact strategies to reach a donor through the channel(s) the donor prefers. With Target Indicators, quickly and easily segment your campaigns to focus on the right donors via the right marketing channels. If you are looking at expanding your sustainer program, or are just getting started, Indicators are also an easy way of finding donors in your file who have propensity to give monthly gifts. Make response rates and ROI soar by focusing resources on better segments.

- **Channel Indicators** - Sort donors who are most, or least, likely to give through different channels — Direct Mail, Telemarketing, or Email
- **Sustainer Indicators** - Find donors who are likely candidates for your monthly giving program

## Top Prospect Model Acquisition Lists

Finding and keeping new donors to support your organization has become increasingly difficult. With response rates in decline, and prospect pools drying up, choosing the right acquisition list is more important than ever. Target Analytics, is able to source and create prospects lists built specifically for your organization, and your campaign goals.

The team will work with your organization to determine your acquisition campaign goals, challenges, and opportunities. Using enhanced analytics, expanded sources of data, and scientific modeling, our team can help build the right list of the right prospects for your organization. Whether you are looking for larger gifts, new names to test a label package, or just trying to increase response rates, Target Analytics will be able to deliver lists of prospects focused on your unique campaign needs.

Built specifically for your organization & campaign based on current donor profiles, the Top Prospect Model **reviews up to 100,000 characteristics** to build a unique set of names for your specific mailing.

Lists can be focused according to campaign goals and priorities:

- **Response List** – Identified frequent donors to drive higher response rates
- **Value List** - Reviews “above average” gift amounts to source higher giving donors
- **Optimal List** – The model identifies the best prospects available to fit your organization and campaign timing
- **Political List** – Models prospective donors based on political donations and affiliations
- **Balance Models** – Back-fill mail plans to reach desired mail quantity while not sacrificing in performance

## Target Tags™ Model

When a donor gives through an event or to a disaster are they a good candidate for an annual fund appeal? If someone is 25 months lapsed are they a better prospect than a 37 month lapsed donor? With Target Tag modeling, you can sort through lapsed and prospect donors with greater ease, and more reliably, than just on RFM alone. Using insights from external data sources and the powerful Cooperative Database of over 2.8 billion transactions, Target Tags will rank and score your donor files on propensity to give to your campaigns. Fundraisers can then use this information to optimize direct marketing efforts, focusing spends on higher ranking segments, cutting out segments less likely to respond, and ultimately improving campaign response rates and ROI.

	Tag Score	Total Records	# Appeals	Total Mailed	% Response	Total Returns
Without Target Tags	None	200,000	1	200,000	0.86%	1,720
With Target Tags	A	24,000	2	48,000	1.68%	808
	B	24,000	2	48,000	1.44%	691
	C	24,000	1	24,000	0.97%	233
	D	24,000	0	-	-	-
	E	24,000	0	-	-	-
	X	80,000	0	-	-	-
<b>Total Using Tags</b>		<b>200,000</b>	<b>5</b>	<b>120,000</b>	<b>1.36%</b>	<b>1,732</b>

## Loyalty Insights

All donors are valuable, but are they all committed? How can you track and predict donor actions beyond relatively basic giving history? Better data enables better segmentation, which in turn enables better campaign results. By shifting and focusing investment levels and messaging strategies for key donor groups, organizations are able to optimize campaign performance, increase donor engagement, and drive better long-term donor value.

Loyalty Insights categorizes your active donors into seven distinct and measurable groups according to their giving history through your organization vs. their historical giving through the expansive Target Analytics Cooperative Database. This model scoring enables fundraisers to view donor loyalty and other characteristics of the file beyond what traditional RFM giving history alone would provide.

Loyalty Insights Group	Description	Sample Recommendation
<b>Best of the Best</b>	Gives you twice as much as other nonprofits	Cultivate, upgrade, & engage
<b>Tipplers</b>	Most frequently single-gift donors	Reduce package & solicitation investment
<b>New and Noteworthy</b>	New to you and give highly to others	Watch and steward
<b>Constant Low Dollar</b>	Gives smaller gifts across the Coop	Keep in less-costly channels or packages
<b>Habitually Generous</b>	Gives often and at a higher level across the Coop	Continue mailing / Stay the course
<b>Not That Into You</b>	High value to others but not as much to you	Cut back mailing
<b>Truly Connected</b>	Doesn't give to many and gives you bulk of donations	Upgrade, offer sustainer options, & consider multi-channel engagement opportunities

## Connection360

Connection360 is an online-advertising solution that displays targeted messages to your best prospects, whenever and wherever they're plugged in. The product uses your donor contact information to identify constituents and display content as they traverse the web, providing tremendous brand exposure, in a very natural and unassuming way. The extra visibility keeps your organization top-of-mind with supporters, which significantly increases the effectiveness of your direct mail, email, and social communications – often providing a Return on Investment in excess of 4-1. The solution also integrates 360 closed-loop reporting, making it easy to justify your budget, since you'll be empowered with hard data showing performance lift across channels, all of which can be tied back to your overall campaign.

The Connection360 process starts by taking your supporter list, and matching it to a massive online cookie pool of individuals, making it possible to identify and target them as they move across the internet. As your campaign progresses, these individuals are presented with images and content that present your organization in the best possible light, increasing the likelihood that they will remember and respond to your direct mail, email, and social communications. Instead of interacting with your constituents on just a monthly or quarterly basis, you gain the opportunity to expose your message each time they go online, exponentially increasing their recognition of your brand.

## IV. donorCentrics™ Performance Analysis & Benchmarking

Every constituent has a unique relationship with your organization, and his or her expected financial support varies depending on whether they are a loyal supporter or a newly-acquired giver; a major contributor, recent upgrader, or lapsed donor. A key to fundraising success is the ability to evaluate the current giving of each constituent in light of their prior giving in order to develop optimal strategies for maximizing the value of that relationship.

Standard reports that provide topline information on revenue and donors can often mask significant underlying trends in donor giving behavior. Campaign reporting can only show the results of individual campaigns, not of your organization's overall efforts to grow revenue, and to acquire, renew, upgrade, or reactivate donors.

Donor-centric reporting puts the donor, rather than the campaign, at the center of the analysis.

Comprehensiveness is critical to discovering opportunities for program growth, identifying underperforming segments, and maximizing donor value. A donor-centric analysis spans many years, since a trend over time is more instructive than a single-year measure. And a donor-centric analysis must be based on actual transactional data sources and standardized according to specific business rules, so it can facilitate comparable benchmarking with peer organizations.

Having the Target Analytics data available is like having an extra member of our team to gather, analyze, and present decision-making data—and present it from every angle.

— Karen McQuigge,  
Director, Alumni Advancement,  
McMaster University

## A Premier Source for Fundraising and Donor Lifecycle Analysis

First introduced in 1989, donorCentrics currently serves over 500 organizations across 25 countries. Over 90% of participants renew the service every year. Nonprofits rely on donorCentrics to:

- Enlarge their donor base
- Nurture existing donor relationships
- Improve fundraising efficiency and resource allocation
- Identify high-value donors for additional cultivation efforts
- Discover areas where improvements are needed
- Implement strategic program enhancements

## donorCentrics™ Dashboards

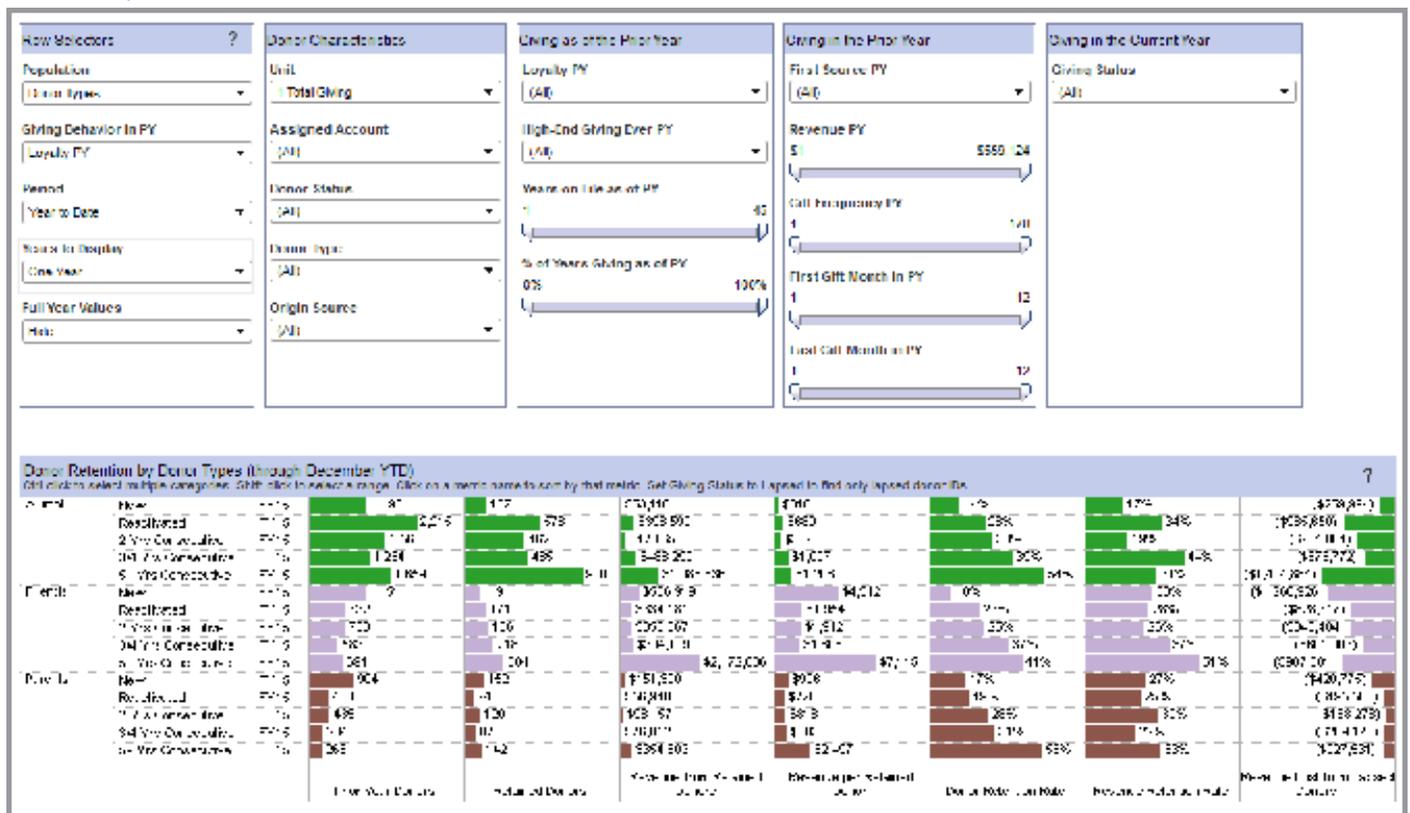
donorCentrics dashboards are a web-based application that provides organizations with a fast, easy, and intuitive visual interface for analyzing fundraising program performance and constituent giving behavior. Dashboards are a natural complement and extension to donorCentrics Benchmarking; many benchmarking participants choose to implement dashboards to monitor fundraising performance as the year progresses, discover mid-year opportunities for rapid growth, and drill-down to specific account IDs to take immediate action on key constituent groups.

The donorCentrics dashboard interface uses advanced data visualization techniques to present metrics and trends graphically. The extensive use of point-and-click filters provides significant flexibility to tailor performance results to specific donor sub-populations, sort views according to multiple criteria, and to quickly access and download underlying donor account information.

Dashboards allow for giving behavior and fundraising performance assessment across your whole constituency, including alumni, donors, friends, and prospects. Cross-unit migration features allow for an in-depth understanding of how donors give across different schools or programs. Similarly, cross-channel giving, such as donors giving to telemarketing or online, can also be analyzed.

Each dashboard presents metrics for multiple years, so current performance can always be viewed in the context of past results. Full-year performance metrics can be shown alongside year-to-date performance for the past five years, providing valuable insight into whether year-end targets are likely to be achieved.

Sample Dashboard



## donorCentrics™ Strategic Audit

The donorCentrics Strategic Audit is designed to analyze past program performance, discover opportunities for growth, and devise strategies for improvement. It includes an Overall Program Assessment (OPA), a comprehensive, multi-year analysis of donor portfolio performance. The OPA is a great resource for understanding past program performance and donor behavior, establishing performance goals, communicating performance to staff, identifying areas for improvement, and preserving institutional memory through transitions. The Strategic Audit also includes an interactive forecasting application for predicting donor and revenue growth, and consulting services provided by a Senior Fundraising Analyst.

The Strategic Audit answers key questions such as:

- What factors affect donor growth over time? What is the expected giving of my unique portfolio of donors?
- What are the trends in donor retention rates for key donor segments and how does that impact donor growth?
- What investments will lead to the largest increases in donor retention?
- Is my donor upgrade strategy working? Am I successfully moving donors to higher giving levels?
- How do different channels or loyalty segments compare in terms of retention and upgrading?
- What segmentation strategy for contacting lapsed donors will yield the best returns?

## donorCentrics™ Collaborative Benchmarking Service

Nonprofits participate in the collaborative benchmarking service to compare the performance of their own fundraising program with 10-25 other organizations, and to collaborate more closely with their peers. Benchmarking allows fundraising professionals to set realistic goals for donor acquisition, donor retention, upgrading, and lapsed donor recapture, based not only on current trends, but on real results from similar organizations. The service provides a consistent framework for reviewing top performing programs in specific areas, and lays the groundwork for building collaborative communities of fundraisers who can then share the most effective fundraising practices.

Unlike other benchmarking efforts, which typically involve time-consuming and often inaccurate surveys, donorCentrics benchmarking calculates performance based on actual transactional giving data downloaded from each organization and standardized according to specific business rules. Instead of just comparing to an average of peer organization performance, which can hide important details, donorCentrics reports also show the individual performance metrics for every named participating organization, permitting more insightful analysis and a comparison to each program independently.

The most anticipated component of this service is the collaborative benchmarking meeting, in which fundraising professionals from each participating organization meet for a two-day group workshop to review the benchmarking reports together. The reports serve as the basis for discussions on proven fundraising strategies and provide important context for the data, clarify the data trends, and facilitate the sharing of best practices.

**Benchmarking groups fill up fast, so contact your account representative today to learn which benchmarking groups have open slots for your organization.**



## For More Information

For more information about any of these services and how Target Analytics® can help you reach your goals; email [TAsolutions@blackbaud.com](mailto:TAsolutions@blackbaud.com), visit [www.blackbaud.com/analytics](http://www.blackbaud.com/analytics), or contact your Target Account Manager, today.