

The Middle Chasm

Leveraging Leadership Annual Giving

Peter Lamothe

Senior Director of Development

The Jackson Laboratory

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JAX Opportunity

- Immature and undermanaged development program
- After deep analytical dive by GG&A, recommend two simultaneous emphases for greatest yield over next several years
 - Intense focus on \$1M+ donors
 - Concerted effort to increase number and level of leadership annual gifts between \$1,000 - \$25,000



Analysis

- GG+A assigns an Annual Giving Rating to every modeled record.
- The Annual Giving model consists of two steps:
 - Identify the current annual giving level using largest gift as provided by JAX. Some constituents will stay at that giving level.
 - Using appended demographic data, lifetime giving history, and relationship/affiliation data supplied by JAX, suggest whether or not the constituent should be asked to upgrade to the next level.
- The Annual Giving methodology is conservative. Significant rating level increases are not possible in GG+A's model.
 - For example, if a constituent is initially identified as a \$500 annual fund donor based on previous giving, he or she will either be rated at that level as a 4 (\$500–999) or be identified with upgrade potential and rated a 3 (\$1,000–2,499).



JAX Target

Gift Capacity Ratings by Match Quality – All Active Households

GG+A Gift Capacity Rating		All Matches (Exact, Near, Possible & Simple)	Exact, Near & Possible	Exact & Near	Exact Only
Highest Value	\$10,000,000+ (1)	80	58	23	17
	\$1,000,000 - \$9,999,999 (2)	425	313	75	63
	\$250,000 - \$999,999 (3)	1,024	738	361	254
	\$100,000 - \$249,999 (4)	2,021	1,693	1,636	1,413
Moderate Value	\$25,000 - \$99,999 (5)	9,811	10,078	10,488	10,585
	\$10,000 - \$24,999 (6)	4,342	4,539	4,337	4,435
	\$2,500 - \$9,999 (7)	2,005	1,987	1,756	1,796
	Less than \$2,500 (8)	2,586	2,888	3,618	3,731
Insufficient Public Wealth Data (9)		0	0	0	0
Grand Total		22,294	22,294	22,294	22,294
		<i>High risk of misinformation</i>	<i>Some research required</i>	<i>Recommended starting point</i>	<i>Most verified data</i>



Strategy

- Institutional priority and written development strategy
- Create portfolio
- Hire leadership giving officer – Summer 2014
- Lead letters – reference past, cumulative, directed giving – share vision, mission, news
- Phone calls - request visit/call to discuss reasons for past giving
- Qualify / Disqualify
- Solicit/Close/Steward – National Council to \$99,999



Next Steps

- No accurate year-over-year data for analysis
- First best year will be 2015
- Realistic 2015 goals
 - 220 gifts of \$1,000 - \$9,999
 - 33 or 15% after Q1
 - 80 gifts of \$10,000 - \$99,999
 - 12 or 14% after Q1
- Metrics
 - measure progress monthly vs. annual goals with comparison to 2014 (guide but not 100% accurate)
- Evaluation

