

Screening Results Sample

(Data provided for example use only. Generic names provided)

SETTINGS

Project Name: Sample

Records Screened: 1,500

Condense of Match: 4.1

Afnity Ratings: \$1 | \$40 | \$200 | \$1,000

Capacity Ratings: 0 | \$50,000 | \$250,000 | \$500,000

Afnity(s): Religion - Christianity / Human Services (General)

PAC Weighting: 33 / 34 / 33

Records with RFM Score: 1,500

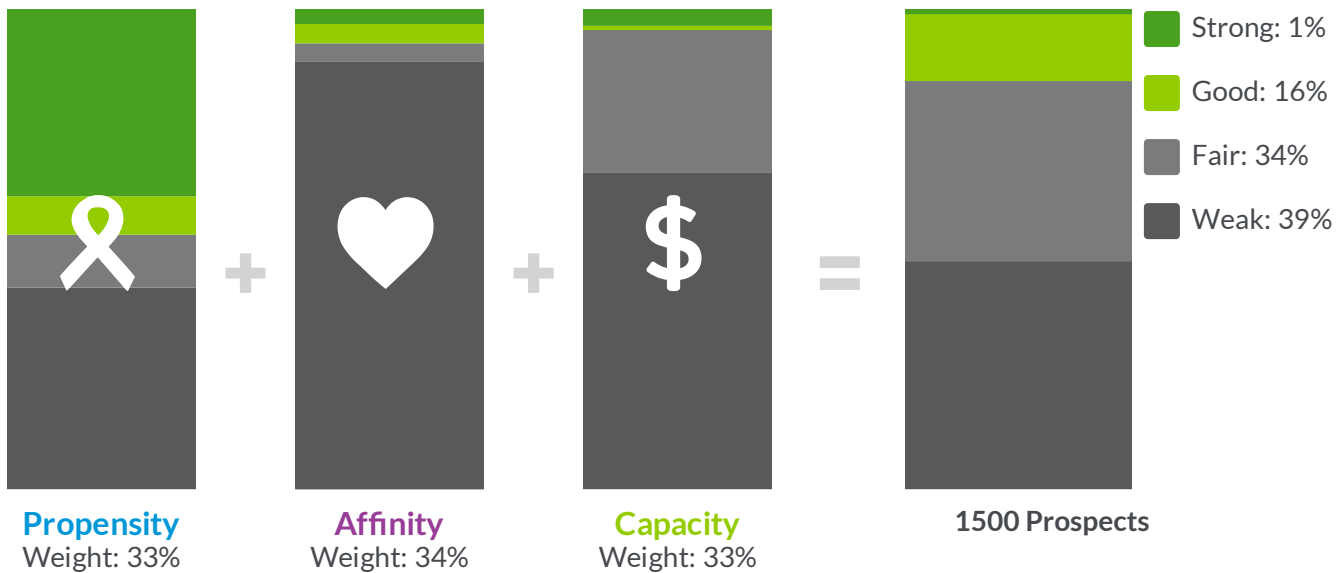
Screened By: The Timothy Group

RATINGS

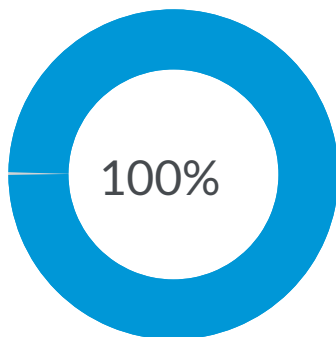


RESULTS

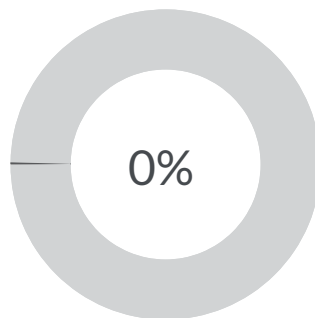
Total Capacity: \$95.08M



SOURCES OF WEALTH

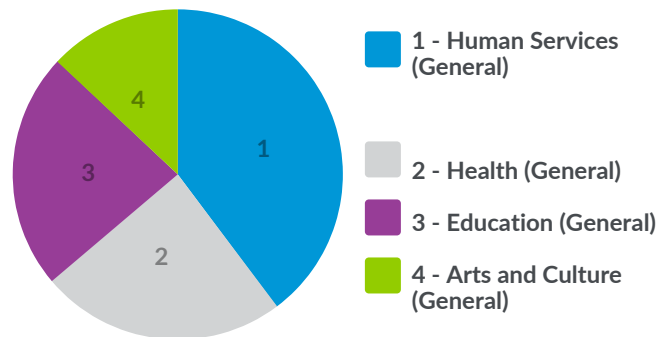


Property
(\$1.13B
(2,441 Properties))



Donations
\$19.49M
(18,998 Donations)

TOP 4 CAUSES SUPPORTED



Total Gifts: 18,998

Screening Analytics

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1500 of the 1500 records include RFM scores and are represented below.

INSIGHTS

The individuals have been screened and segmented into four groups based on their philanthropic history with your organization (RFM score) and their philanthropic and wealth history outside of your organization (iWave score).



HIDDEN GEMS

These prospects have capacity and are already giving to other nonprofits.



DISTINGUISHED PHILANTHROPISTS

Major gift donors that donate to your cause but may have additional capacity.



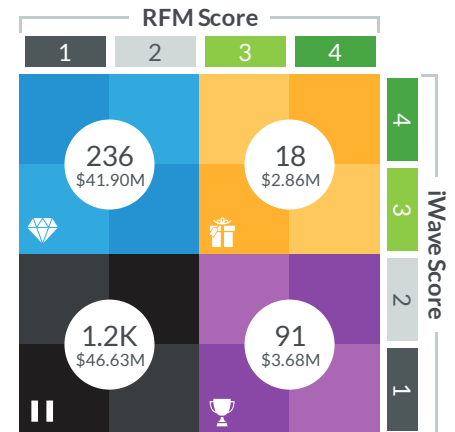
NOT NOW PROSPECTS

Individuals that do not appear to be philanthropic with any nonprofits.



YOUR CHAMPIONS

They donate to your cause but are not on the radar of other nonprofits.



TOP 5 RESULTS BY GROUP

GROUP	NAME	IWAVE SCORE	RFM SCORE	ESTIMATED CAPACITY
Distinguished Philanthropists	John & Sarah Smith	3	3	\$453,128
	Michael & Jennifer Johnson	4	3	\$339,458
	David & Michelle Brown	4	3	\$307,634
	James & Lisa Wilson	3	3	\$261,020
	Robert & Kimberly Davis	3	3	\$238,920
Hidden Gems	William & Amanda Anderson	4	2	\$1,841,212
	Richard & Melissa Martinez	4	1	\$1,712,469
	Joseph & Emily Taylor	3	1	\$1,198,418
	Charles & Laura Clark	3	2	\$1,074,119
	Thomas & Jessica Hernandez	3	1	\$913,226
Your Champions	Daniel & Elizabeth Miller	2	3	\$565,077
	Benjamin & Nicole Thompson	1	3	\$205,370
	Matthew & Rachel White	2	3	\$189,525
	Andrew & Rebecca Lewis	2	3	\$176,115
	Christopher & Stephanie Hall	1	3	\$168,950
Not Now Prospects	Anthony & Karen Walker	2	1	\$2,889,612
	Steven & Christine Young	2	1	\$860,887
	Brian & Patricia Turner	2	1	\$780,775
	Timothy & Mary Adams	2	1	\$351,687
	Kevin & Megan Harris	2	2	\$334,201

Screening Analytics

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1,500 of the 1,500 records are represented below.

CULTIVATION

The individuals have been screened and segmented into four groups based on their capacity (wealth) and propensity to give (history of giving and/or a board affiliation with a foundation).



STORYTELLING

These prospects need to know what their hard-earned money will accomplish. Start by sharing your mission and the impact of a gift using stories, photos and videos.



PERSONALIZATION

These are major gift prospects! Utilize personalized messages and customized initiatives like exclusive events, on-site tours or nomination for a board position.



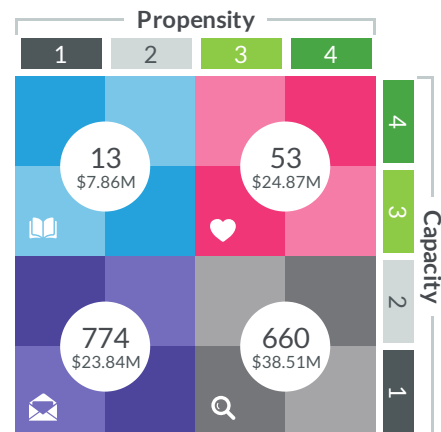
ANNUAL

These individuals should be considered your lowest priority. Encourage them to join your newsletter, follow your social media channels, or receive an annual mailing letter.



RESEARCH-DRIVEN

These prospects have likely hidden their wealth and are potential major gift donors. Do research to determine the right messaging.



TOP 5 RESULTS BY GROUP

GROUP	NAME	PROPENSITY SCORE	CAPACITY SCORE	ESTIMATED CAPACITY
Personalization	Daniel & Sarah Anderson	4	4	\$1,841,212
	Matthew & Emily Baker	4	4	\$1,712,469
	Christopher & Jessica Carter	4	4	\$1,198,418
	William & Rachel Davis	4	4	\$1,074,119
	Nicholas & Olivia Evans	4	4	\$913,226
Storytelling	Jonathan & Amanda Foster	1	4	\$2,889,612
	Benjamin & Lauren Garcia	2	4	\$860,887
	Samuel & Natalie Harris	1	4	\$780,775
	Andrew & Michelle Jackson	1	4	\$565,077
	Alexander & Laura King	2	3	\$351,687
Annual	Gregory & Stephanie Lewis	2	2	\$247,859
	Joseph & Elizabeth Miller	1	2	\$245,235
	Patrick & Jennifer Nelson	1	2	\$236,187
	Jonathan & Katherine Parker	2	2	\$235,100
	Brandon & Nicole Reed	1	2	\$222,510
Research-Driven	Nathan & Maria Sanchez	4	2	\$247,733
	Timothy & Samantha Turner	4	2	\$246,457
	Richard & Melissa Walker	3	2	\$244,818
	David & Kimberly White	4	2	\$243,465
	Brian & Lisa Young	4	2	\$238,920

Screening Analytics

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Generated by Fundraise with Confidence

1,500 of the 1,500 records are represented below.

ENGAGEMENT

The individuals have been screened and segmented into four groups based on their capacity (wealth) and affinity to your cause (history of giving to organizations like yours and/or board affiliation with organizations like yours).



TEAM

These prospects have not shown a connection to your cause but have high potential to give. Utilize your communications or marketing team to engage these prospects in a nurture campaign.



LEADERSHIP

These prospects have great potential to give a major gift or planned gift. Engage using highly influential advocates like your executive director, board members, or an existing major donor.



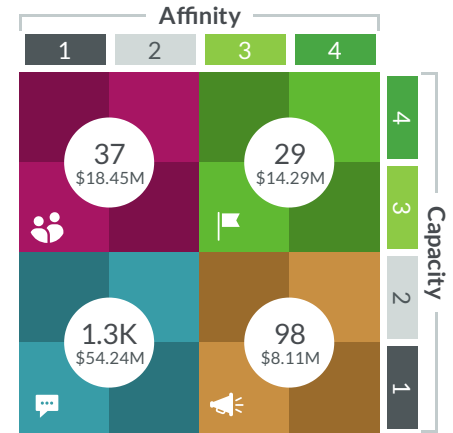
SOCIAL

These individuals should be considered your lowest priority to action. Use inexpensive, time-effective channels like group emails and social media.



AMBASSADOR

These individuals are passionate about your cause. Engage using ambassadors (e.g. fundraisers, volunteers, members) and time-effective channels like group emails and social media.



TOP 5 RESULTS BY GROUP

GROUP	NAME	AFFINITY SCORE	CAPACITY SCORE	ESTIMATED CAPACITY
Leadership	John & Sarah Smith	3	4	\$1,841,212
	Michael & Jennifer Johnson	4	4	\$1,712,469
	David & Michelle Brown	4	4	\$747,747
	James & Lisa Wilson	3	4	\$647,357
	Robert & Kimberly Davis	3	4	\$578,438
Team	William & Amanda Anderson	1	4	\$2,889,612
	Richard & Melissa Martinez	2	4	\$1,198,418
	Joseph & Emily Taylor	2	4	\$1,074,119
	Charles & Laura Clark	2	4	\$913,226
	Thomas & Jessica Hernandez	1	4	\$860,887
Social	Gregory & Jennifer Turner	1	2	\$247,859
	Daniel & Allison Parker	2	2	\$247,733
	Russell & Stephanie Fisher	1	2	\$245,235
	Timothy & Samantha Brooks	2	2	\$244,818
	Christopher & Lauren Sullivan	2	2	\$237,000
Ambassador	Aaron & Michelle Nelson	3	2	\$246,457
	Jonathan & Kimberly Price	3	2	\$243,465
	Brian & Sarah Coleman	4	2	\$238,920
	Nicholas & Jennifer Ward	4	2	\$223,385
	Justin & Rachel Griffin	4	2	\$221,574

1,455 of the 1,500 records include Planned Giving Segments and are represented below.

PLANNED GIVING

These individuals have been screened and segmented into four groups based on the potential to donate a planned gift based on iWave's analysis of their planned giving indicators (Planned Giving Score) and the recency and frequency of their giving to your organization (Giving to You Score).



STRONG PLANNED GIVING PROSPECT

These individuals have great planned giving potential. However, they don't appear to have given to you. We recommend nurturing them into planned giving donors.



IDEAL PLANNED GIVER

These individuals are excellent planned giving prospects. If they are not already in a planned giving campaign, we recommend adding them.



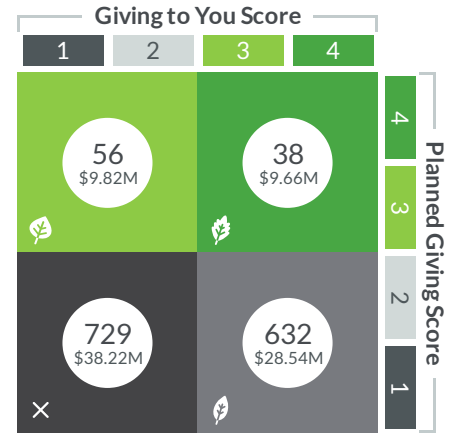
NOT PLANNED GIVER

These individuals do not currently have planned giving potential. We recommend dismissing them from planned giving campaigns for now but continuing to leverage them in other fundraising activities.



POTENTIAL PLANNED GIVER

These individuals appear to be great donors and lovers of your cause. However, they are missing some key indicators of planned giving. The potential is there, but further research is required.



TOP 5 RESULTS BY GROUP

GROUP	NAME	PLANNED GIVING SCORE	GIVING TO YOU SCORE	ESTIMATED CAPACITY
Ideal Planned Giver	Michael & Emily Adams			\$1,841,212
	David & Sarah Bennett			\$747,747
	Jonathan & Jennifer Clark			\$571,815
	Christopher & Elizabeth Davis			\$476,010
	Matthew & Lauren Evans			\$456,155
Strong Planned Giving Prospect	Timothy & Samantha Turner			\$1,712,469
	Richard & Melissa Walker			\$717,024
	David & Kimberly White			\$578,009
	Brian & Lisa Young			\$551,849
	Kurt Moyer			\$467,864
Potential Planned Giver	Benjamin & Natalie Foster			\$1,074,119
	William & Jessica Gray			\$565,077
	Andrew & Katherine Hall			\$453,128
	Daniel & Olivia Hughes			\$370,641
	Robert & Megan Jenkins			\$366,055
Not Planned Giver	Richard & Victoria King			\$860,887
	Joseph & Rachel Mitchell			\$780,775
	Anthony & Melissa Nelson			\$578,438
	Thomas & Amanda Parker			\$571,804
	James & Laura Reed			\$483,740