

DATA HEALTH INITIATIVE

Start: July 2024

Budget: \$51,000

Finish: June 2025

Actual YTD: \$0

DATA HEALTH INITIATIVE WORKFLOW

Task	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Demos of wealth screening software providers	■						
Procurement process to secure contract with chosen vendor				■			
Onboarding with iWave software					■		
Conduct Initial Wealth Screen of Database						■	

RISK/MITIGATION

Risk is minimal. It has been close to a decade since either a full wealth screening or thorough audit has been conducted. It is anticipated that any updates or new information that is acquired as a result of these processes will assist with both major gift and annual giving fundraising efforts.

Q1 HIGHLIGHTS

- ✓ Procurement process was initiated for a wealth screening service
- ✓ Interviews/demos were conducted with three wealth screening services
- ✓ Initial interview with a data provider also was conducted

Q2 OBJECTIVES

- Select a wealth screening service provider
- Conduct full wealth screen of alumni/donor database
- Provide training for development and advancement services staff on wealth screening software
- Complete interviews with potential data providers and initiate procurement process

Status:



Lead: Kevin Hughes

Pillars: Engage

Date: 11/25/24

DESCRIPTION

As a part of campaign preparation, this is a full wealth screening of our entire alumni database, along with a three-year subscription to a wealth monitoring service, and assistance in identifying the “best-fit” prospects based upon donor behavior. This is also a thorough audit of all alumni data, providing contact info.

