

CAMPAIGN UW: CREATING FUTURES

**THE EVOLUTION
OF ADVANCEMENT
RESEARCH**

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TODAY'S AGENDA

- A nod to the past (2 minute history)
- The state of the profession (today's fashions)
- Predicting the future
- Positioning for success

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2 MINUTE HISTORY OF PROSPECT RESEARCH

- Began about 30 years old
- Everything was paper
- Typewriters, not computers
- Less information available
- Secretarial and Library background; later Social Sciences

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2 MINUTE HISTORY OF PROSPECT RESEARCH

- Always ethical
- Growth tied to:
 - Technology
 - Increase in publicly available information

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2 MINUTE HISTORY OF PROSPECT RESEARCH

Reactive

- Primarily biographical
- Summarizing information from news, alumni/donor database and reference books
- Limited financial information provided; rarely analyzed

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2 MINUTE HISTORY OF PROSPECT RESEARCH

Archival (low-tech):

- Clipping News Articles
- Maintaining hardcopy files

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TODAY'S FASHIONS

Big changes:

- Addition of proactive research
- Tied to development cycle
- Dollars instead of time
- Financial analysis/rating giving capacity
- Addition of macro-level data analysis
- Prospect management grew up

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TODAY'S FASHIONS

Reactive Research

- Biographical and financial research
 - Tied to development cycle and ask amount
 - Targeted to answer specific questions
 - Rating giving capacity
 - Quantified/measured

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TODAY'S FASHIONS

Proactive Research

- Prospect identification
 - Aligned with organizational priorities
 - Rating giving capacity
 - Quantified/measured

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TODAY'S FASHIONS

Prospect Management

- Relationship Management (CRM)
- Donor-focused
- Tied to organizational priorities
- Used for fundraiser accountability

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TODAY'S FASHIONS

Campaign Feasibility, Progress and Analysis

- Gift range tables/campaign pyramids
- Dynamic pyramids (capacity + inclination)
- Pipeline projections
- Historical analysis

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TODAY'S FASHIONS

Benchmarking

- Set goals and benchmark against them
- Measure what you care about
- Push out information
 - Graphically
 - In management terms

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TODAY'S FASHIONS

Macro-level data analysis

- Prospect ID
 - Data mining
 - Predictive modeling
- Demographic profiling
- Campaign analysis
- Resource Allocation

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PRESENT

New Skills Required

Old Skill Set

- Research (bio and financial)
- Writing

Additional Skills Required

- Financial Analysis/Rating
- Macro-level data management, analysis & querying
- Public Speaking & Executive Interaction

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PRESENT

HR Implications

- Increased Salaries
- Job-Seeker's Market
- Headhunters Hired

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FUTURE

- Specialization (large organizations)
- Salary stabilization
- Larger campaign/strategic planning role
- Reporting line changes
- Even more accountability

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FUTURE

- Privacy Threats
 - Three threats to security
 - Hacking
 - Physical theft
 - Insider theft
 - “Publicly available” vs. “Public”
 - No more SSNs

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PREPARATION

What it means in your world

<p><u>Researchers</u></p> <ul style="list-style-type: none"> • Skill in all 4 key technical areas • Writing • Public Speaking • Executive Interaction • Reporting skills 	<p><u>Managers</u></p> <ul style="list-style-type: none"> • Expect current skill set • Realistic salary expectations • Take advantage of expertise • Grow/retain staff • Focus on information security
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QUESTIONS

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