



Soft Skills for Attachment Score Success

2018 Advizor Solutions'
Users Group Conference



We are so glad you are here!

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Agenda

Takes More than Building the Model

- Gain support of leadership and key users
- Share a vision

Implementation of Attachment Score

- Process
- Prep Work before Eric's training
- Building the model
- Roll out

History



Purchased Advizor around 2013

Staff changes caused loss in momentum with project



Attended November 2017 Advizor's User Group Conference

Myself and Sam are excited about the product and develop 3-year plan

Leadership Support Important

1. Confirmed current results with \$10K and \$25K models
2. Developed a vision for the product
 - a. Created 3-year plan
 - b. Shared success of others at User's Group Conference
3. Gained approval on 3 projects



Reinvigorate Gift Officers

1. Listened to gift officer's frustrations
2. Made requested changes to their project
3. Shared 3-year plan
4. Created project implementation team with GOs
5. Offered 1x1 training



Committed to 3 New Projects

1. Attachment/Engagement Score

- Implemented July 2018

2. Penetration/Activation Report

- Implement late 2018

3. Prioritization Report

- Implement in 2019



Attachment/Engagement Score

- Sam is our Advisor expert in our office
- She and Eric will discuss the implantation of this project



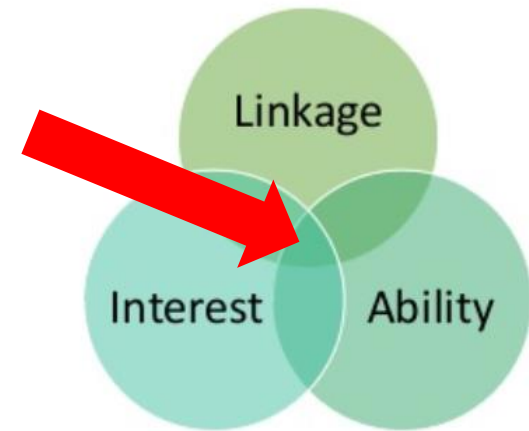
Process

1. **Leadership Buy-in:** Presented leadership with business question and proposed solution
2. **Prep Work:**
 - a. Identified potential Engagement data points
 - b. Conducted CRM updates
3. **Score Development:** Held training with Eric
4. **Department Buy-in:** Met with Project Group to train, gather feedback, and brainstorm
5. **Ongoing:** Intentional implementation



Leadership Buy-in

- **Business Question:** How do we prioritize constituents in our database at various giving levels?
- **Solution:** Develop an Engagement Score to couple with Capacity Rating
- **Selling Points (Use Case):**
 - **Major Giving:**
 - Use in Prospecting/Prospect Assignment
 - Target activities for key prospects to increase attachment
 - Portfolio Moves Management → Prioritization!
 - **Event Attendance:**
 - Identify prospects most likely to respond
 - Help balance “right people – right message”



Prep Work

- **Who:** RCF “Data Team” – Director of Dev Ops, Manager of Prospect Development, Prospect Development Analyst, Database Administrator

- **Process:**

1. **Brainstorm**
2. Update CRM

Datapoints	In Advizor?
Type of Actives: Meaningful Contact (Tour, Phone/Call, F2F (rolling 12 months, y/n))	Yes - might need to edit
Email Opt Out	No
Current Email on File	No
Distance from Riley	Yes
Number of Events attended (bin: 1-5, 6-10, etc)	Yes?
Type of Events attended: Level 1	No
Type of Events attended: Level 2	No
Type of Events attended: Level 3	No
Type of Events attended: Level 4	No
Participated in a Campaign (GHHH, Employee Giving, Giving Tuesday, My Heart Belongs to Riley)	Kind of
TR Registration (bin by amount raised and/or years registered)	No
Marked as RS	Yes
RFM	Yes
Giving in last 5 yrs, last 6-10	Yes
Active Sustainer	Yes
Engagement/Committee: W4R*	Yes
Engagement/Committee: DM*	No
Riley Family/Kid marked/Patient List/Champion/Camper	Yes
Hospital Employee (Y/N) - affiliation	Yes
Click-throughs	No
Engagement/Committee: Tom Wood donor	Yes
Engagement/Committee: License Plate donor	Yes
Engagement/Committee: Responded to Welcome Series Survey	Yes
Engagement/Committee: BOG*	Yes
Engagement/Committee: Regional Committee Member*	Yes
Engagement/Committee: Campaign Committee Members	Yes
Engagement/Committee: RSAC*	Yes
Engagement/Committee: KCS Board*	Yes
Engagement/Committee: County Leader	Yes
Event Host	Yes
*Includes levels of Members, Officers, Chair	



Prep Work

- **Who:** RCF “Data Team” – Director of Dev Ops, Manager of Prospect Development, Prospect Development Analyst, Database Administrator
- **Process:**
 1. **Brainstorm**
 2. **Update CRM**
 - Possible points to use which weren’t in CRM AND had business reason to live in CRM → added
 - Division of work
 - Division of training on new fields/entry
 3. **Narrowed down potential factors**

Score Development

- **Creating a Specific Model**
 - Clearly answers a business question
 - Practical end use case and action plan
 - Bounded dataset
- **Modeling Concepts – General Theory**
 - How to think about models
 - Base and Target Population
 - **Explanatory Factors**
 - Iterative and collaborative process
- **Analyst/X Software Training**

Explanatory Factor Discussion

How do we come up with good explanatory factors?

- Hypotheses for answers to the business questions
- Data quality?
- Spurious correlations?
- Data Transformations?
- A Few Good Factors

Hypotheses

Data Points		
Active sustainer	1924 Society	Employee Giving Committee
Digital Ambassador	Campaign committee	Welcome Series responder
County Leader	W4R member	Tom Wood assoc.
Email Opt Out	Event attendance	BOG
Team Raiser - \$ raised	Frequency of gift (RFM)	RSAC member
Hospital Employee	KCS board member	License Plate purchaser
Recency of gift (RFM)	Regional Committee member	Riley family
Count of F2F		

Data Quality

- **Do we have the data?**
 - Event attendance data
- **How did we collect that data?**
 - Not uniform between departments
- **Is there any systematic bias in that data?**
 - Survey results come from those that got the survey

Spurious Correlations

- Is the factor dependent on the outcome we are trying to predict?
 - Gift Club – Riley Society
- Is there some underlying factor we are missing?
- Are two factors too similar?
 - Age and Class Year.

Data Transformations

- **Calculations**
 - RFM score (Recency of gift or Frequency of gift)
- Do we need to bin or group the data?
- What to do about outliers?
- Is the factor really a proxy for something else?
 - Location vs Distance?

Engagement Score Algorithm Confirmed

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Project Group



- **Why:**
Gain buy-in from end users
- **Who:**
One representative from each team (Leadership, Major Gifts, Annual Fund, Communications, Regional Team/Volunteers)
- **Process:**
3 Meetings over 4 months
 1. Training/Review of 1st Draft/Discussion of new points
 2. Review of 2nd Draft/Discussion of new points
 3. Review of 3rd Draft/Review points for the future

Roll Out

- **What:** Presentation to all development staff (key stakeholders)
 - **Why:** Opportunity to educate staff AND utilize buy-in from Project Group
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Today

By the end of the meeting, everyone should:

- Understand what an Engagement Score is and why it is needed
- Understand how Prospect Development will use it
- Understand how it can be used to prioritize your portfolio
- Understand how all team members play a role in its power



Moving Forward

- **Upkeep**
- **Implementation by Prospect Development:**
 - Reporting → Include in portfolio reports, Daily Gift Reports, Event lists
 - Prospecting → Portfolio Reviews, Group screening
- **Success**

Summary

Model implementation is more than designing the model

- Use your Advizor consultant
- Gain leadership's support
- Create a project group for development and implementation of the model
- Create and implement the model

Questions

