Scores

TrueGivers

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Overview

TrueGivers provides three generic donor models. Scores from these models are then applied to any donor file run through the platform. The three generic donor models are:

- **Major giving model**: a model that predicts the likelihood of donors giving a major gift, i.e. a gift of $5,000 or more. Model scores are based on external demographic, professional and political data. Future release will add TrueGivers proprietary Philanthropic data now in Beta.
- **Midlevel giving model**: a model that predicts the likelihood of donors giving a midlevel gift, i.e. a gift between $1,000 and $5,000. Model scores are based on external demographic data and typically about 65% of recent donors can be scored.
- **Planned Giving model**: a model that predicts the likelihood of donors giving a planned gift. Model scores are based on external demographic data and the age of the donor. Typically about 55% of recent donors can be scored.

What Goes into the Models' Recipes

- Assets: Property data for homeowners including **equity**, vehicle data, **economic stability rating**, insurance, and overall net worth
- Demographics: Household and individual demographics, including age, occupation, education, political affiliation, ethnicity, and **number and ages of children**
- Income: Household income in ranges up to **$2,000,000 plus**, and **discretionary income**
- Giving Propensity and Interests: Overall **giving propensity** and specific types of **charitable causes supported**
- Buying Habits: **Online vs. offline buying preference** and specific product purchases, e.g. electronics, home improvement, and travel
- Lifestyle Clusters: Segmentation of households into **clusters with similar interests and behavior**
- Personal Interests: **Hobbies and interests**, e.g. arts, technology, sports, travel, food, green living
- Financial Behavior: Insights about investing, use of banking services, and **spending**
- **Individual Giving behavior** from TrueGivers' proprietary Philanthropic Database to partially determine affinity is now in Beta and will be added in the 4th Quarter of 2014.
- Professional and political giving information from TrueGivers databases.

In addition TrueGivers can provide the following models if customer specific giving data is available that can be used for modeling. Data with at least 50,000 active donors (i.e. donors who have donated within the last 24 months) is required to do this:

- Reinstatement model: a model that predicts the likelihood of lapsed donors to reinstate. Model scores are based on giving data (RFM) supported by external demographic data. 100% of lapsed donors can be scored.
- Improvements to the major giving model: add giving data to the data used to build the model. Typically between 65% and 100% of recent donors can be scored.

- Improvements to the major giving model: add giving data to the data used to build the model. Typically between 65% and 100% of recent donors can be scored.
- Affinity model – a model that predicts the affinity of donors to the NTEE sector of choice. Donors faced with the option to make a gift to one or more NTEE sectors will have a score aligned with the NTEE sector modeled.
- Capacity model – a model that indicates the highest potential gift a donor can make.

Scoring Methodology

TrueGivers models and scores are built using a combination of giving **capacity** ability to make a philanthropic gift within a specific time—usually five years) can be scored…**affinity,** the closeness of the individual to the organization in both in terms of giving to like organizations and affiliations with like organizations…and **demographic** factors such as age, lifestyle, presence of children in the household etc.

The model variables have been identified, derived and weighted through the analysis of hundreds of donor files with the formulae tested against actual experiences of a wide and diverse range of nonprofits.

Score Values for Generic Donor Models

All generic model scores range from 0 to 999, but the "meaning" of the score values differs from model to model. E.g. while a donor with a lapsed score value of 150 is an excellent candidate for reinstatement, an active donor with a major donor score value of 150 is not a good major donor candidate.

This document provides a simple overview where the different score values fall based on cumulative gain and lift of the individual models.

Please note that the generic models are built based on the assumption that data in a typical donor file is similar to the data the models were built off. The degree of this similarity varies between different donor files. Therefore a certain gain or lift for a certain score as described in this document cannot be translated directly to the same gain or lift when a generic model is applied to a donor file.
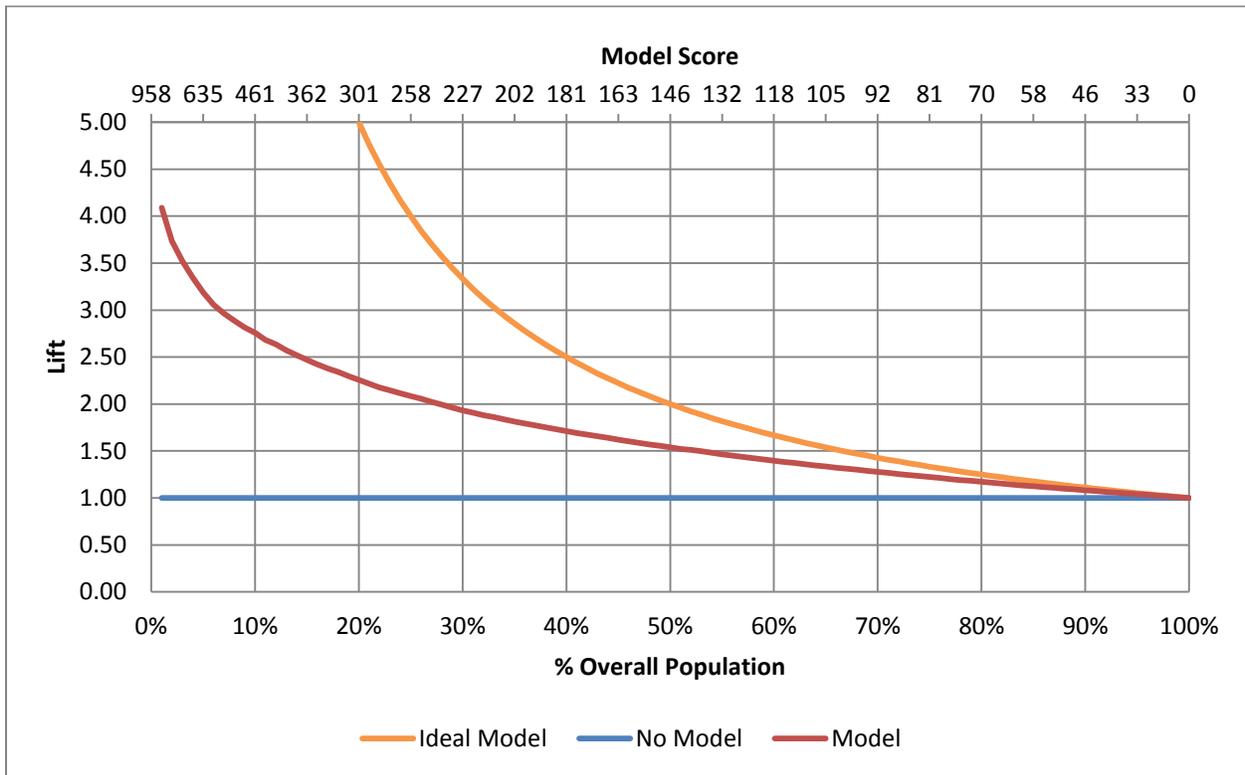
The Models

Major Donor Model

The charts below show cumulative gain and lift for the major donor model based on the data used for modeling.

Figure 1: Cumulative Gains Chart for Major Donor Model

Figure 2: Lift Chart for Major Donor Model

Across the top of the chart the score values are shown in 5% intervals. The table below shows the model score values for specific lifts, the "Prospect Quality" columns shows a suggestion how these score ranges could be communicated to customers.

Lift	Score	Prospect Quality
1.5	140	fair
1.75	195	good
2	250	better
2.5	380	best

Midlevel Donor Model

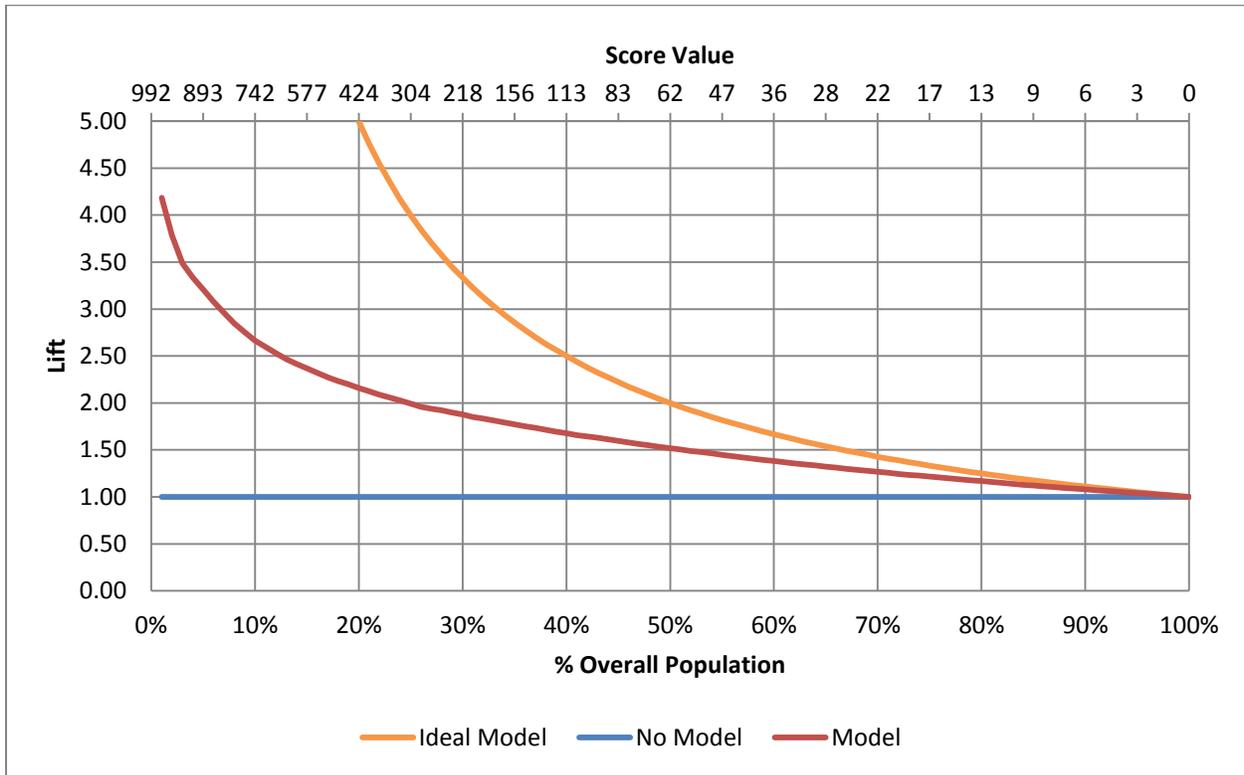In the same way as for the major donor model, lift chart and model score values for specific lifts are shown below:

Figure 3: Lift Chart for Midlevel Donor Model

Lift	Score	Prospect Quality
1.5	60	fair
1.75	155	good
2	325	better
2.5	690	best

Planned Giving Model

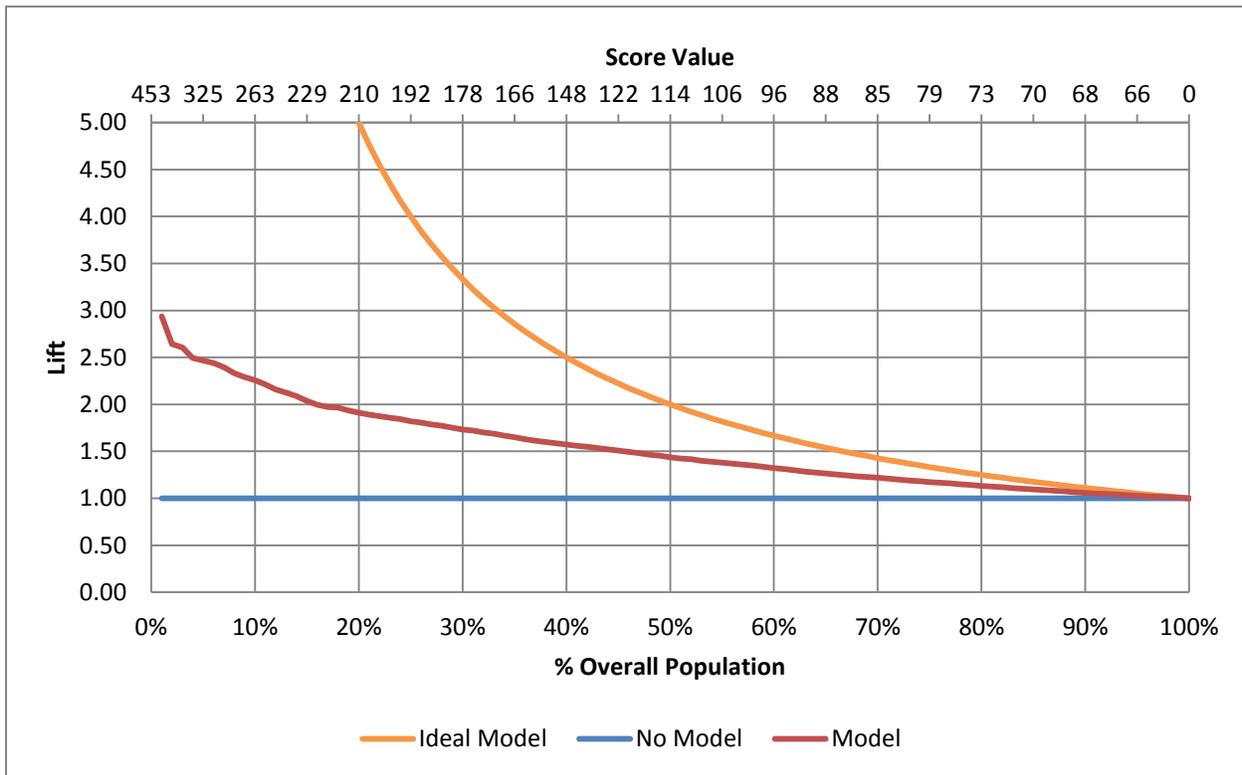Lift chart and model score values for specific lifts for the planned giving model:

Figure 4: Lift Chart for Planned Giving Model

Lift	Score	Prospect Quality
1.5	125	fair
1.75	185	good
2	230	better
2.5	335	best

Additional Models for Scoring

The platform provides a framework that makes it easy to add additional models for scoring. An example for such models would be models that target other giving ranges than the existing midlevel and major giving models.

Reporting

The platform provides a framework that allows the creation of automated reports in PowerPoint format. These automated reports can include the results of queries against any data in the platform as charts, tables or single fields.

Reports may be exported automatically to CSV or PDF files as needed.