

THE  
**SOLAS**  
GROUP

## **Blurring the Lines: Reimagining Advancement Services as an Annual Fund Solicitor**

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Partners, The Solas Group

# About Us

- Our partners have approximately 70 years of combined experience in advancement services, fundraising support, and campaign planning
- Founding members, Association for Advancement Services Professionals (aasp)
- Innovations have garnered multiple awards, including a “best of the best” CASE Platinum for Best Practices in Advancement Services

# The Greatest Impact on Annual Giving

- Technology
- Data visualizations
- Predictive modeling



# Technology

Understand the business. Think creatively.

# Creative Use of Technology

- Automated email solicitations
  - “Anniversary” email solicitation
  - SYBUNT email solicitation
  - Post-event email solicitation
- Automated stewardship emails
  - First-time donor
  - Consecutive year donor
  - Giving society
  - Impact email



# Creative Use of Technology

- Event registration

Make a Gift

Would you like to make a gift to help support the students of DePaul?

\$15

\$25

\$45

Other amount (enter below):

\$

Fund:

--Select One--

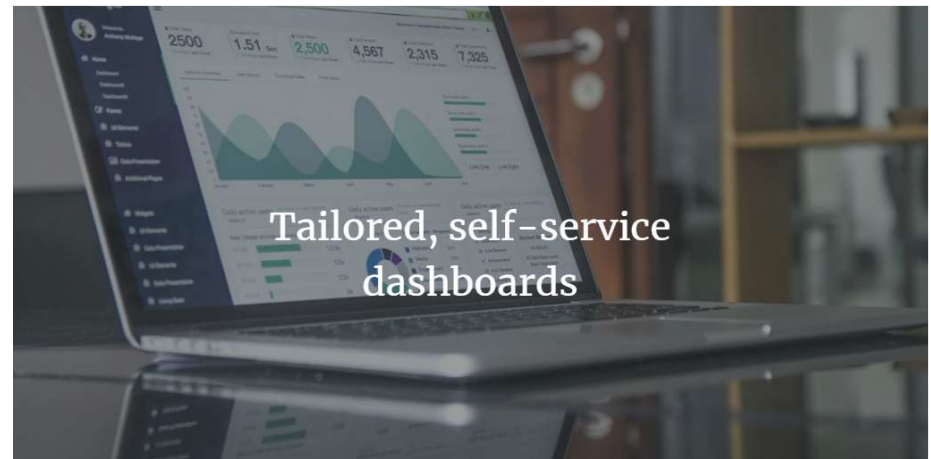
Register

# Data Visualizations

## Revenue-generating

# Annual Giving Data Visualizations

- Prospect finder
- Alumni donors by fiscal year
- Daily telefund activity
- Annual giving summary
- Annual giving by segment
- Donor migration





# Celebrate at Year End

## Predictive Modeling

# Understanding the Problem

- Goals: Acquire new donors and fuel the major gift pipeline
- Channels: Mass communications and leadership giving
- An ideal place to start with predictive modeling



# Understanding the Problem

- Limited resources
- Prioritizing who gets solicited
- Optimizing mix, frequency, and timing of solicitations by channel and segment
- Analysis paralysis



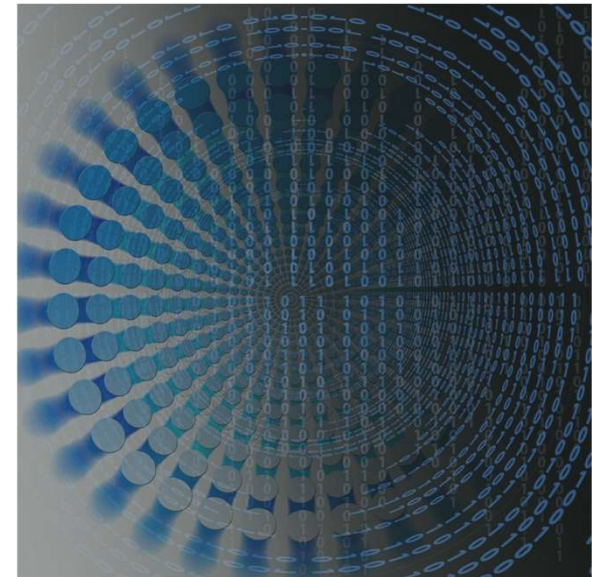
# Problem-Solving Predictive Models

- Likely donors
- Channel preference
- Likely upgrades
- Likely to answer a call
- Forecasting and simulation



# Data Elements

- Basic: RFM (Recency, Frequency, Monetary)
- Complex: More aspects of RFM, giving velocity, demographics, constituent types, degrees, interactions, geography, employment, assets
- External: Geodemographic segment, wealth screening



# Methodology

- Historical data
- SQL for most data preparation
- Statistical software for modeling
- Logistic regression
- Used for over 30 years in fundraising
- Innovate with feature reduction, regularization, novel algorithms, novel data elements, creative applications, visualization

# Recommended Resources

- CoolData blog  
(<https://cooldata.wordpress.com>)
- Fundraising Analytics: Using Data to Guide Strategy by Josh Birkholz
- Prospect-DMM discussion group  
(<https://mailman.mit.edu/mailman/listinfo/prospect-dmm>)



# Questions

- Stay in touch!

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