Portfolio Management Analytics

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Quick Bio

- Currently Assistant Director, Prospect Research and Development at Grand Valley State University in Grand Rapids, MI
- APRA-MI Board Member
- ARC Planning Committee
- Previous Presentations:
  - DAS, APRA-Canada, APRA chapters, AFP
- Other projects:
  - Content Review Expert (Inside Stock and Compensation)
  - Content Contributor for APRA-Canada book
  - Four Top 25% finishes and one Top 10% finish on Kaggle

Objectives

- Examine data points that can be visualized and analyzed to aid in portfolio management
- Look beyond visit counts and duration between visits to investigate the quality of visits
- We will look to answer the following questions:
  - Are gift officers meeting with the right people?
  - Are gift officer strategies lining up with goals and expectations?
  - Are gift officers on message?
- We will use R to do this though it may be possible in Excel or using other resources

Why R?

- R is an open-source resource which means anyone can freely download it and begin using it
  - R: https://cran.r-project.org/bin/windows/base/ (Windows download)
  - R Studio: https://www.rstudio.com/products/rstudio/download/
- Once you have code set up you can re-use it over and over
  - This is true with Macros as well but R is much easier to write than VBA (in my opinion)
- It has functionality not available in Excel
- It's worth it and not as difficult as you think
  - You will get a positive return on your effort

STARTING POINT

- I regularly meet with the VP for Development to review Actions
- I began by just showing a chart of actions over time

	7/1/2015	8/1/2015	9/1/2015	10/1/2015	Grand Total
	7	2	7		16
	4	20	18	11	53
	4	9	6	3	22
		1			1
	1	5	9	1	16
	9		4	4	17
			5	11	16
	20	16	25	26	87
	2	1	3	7	13
	13	23	17	30	83
	3	4	2	2	11
	7	5	1	1	14
	1	2	12	3	18
	7	12	19	4	42
	3	19	14	24	60
	81	119	142	127	469

STARTING POINT (CONTINUED)

○ This is in addition to Excel sheets that I would prepare for gift officers like this:

| act_date	visit_date	lub_y	pldg_b	FY16	FY15	FY14	total_givi
1/5/2016	6/15/2015	20	$0	$1,125	$2,195	$1,100	$17,628
1/4/2016	4/17/2015	4	$2,000	$800	$2,550	$800	$6,680
12/9/2015	12/9/2015	3	$40	$300	$710	$1,390	$2,010
11/2/2015	6/18/2015	15	$0	$100	$300	$45	$25,381
5/23/2013		0	$0	$0	$0	$0	$49,749
1/23/2004		0	$0	$0	$0	$0	$46,550
11/11/2015	12/16/2014	5	$500	$0	$4,000	$7,000	$15,500
1/5/2016	1/5/2016	28	$41	$3,260	$5,435	$2,415	$30,744
1/5/2016	11/26/2014	0	$0	$300	$500	$0	$1,500
11/18/2015	6/8/2015	9	$0	$500	$1,720	$1,330	$15,079
10/12/2015	6/4/2015	7	$0	$2,500	$2,500	$2,500	$9,400
12/14/2015	9/14/2015	10	$0	$750	$750	$500	$3,475
12/11/2015	12/11/2015	5	$0	$0	$1,000	$7,000	$25,000
11/11/2015	10/6/2015	3	$0	$3,000	$2,500	$5,000	$13,600
11/11/2015	6/11/2014	5	$0	$0	$45,180	$50,089	$144,845
9/10/2015		8	$0	$2,500	$1,200	$1,000	$8,500
12/4/2015	11/10/2015	3	$600	$1,000	$0	$50	$1,250

Additional Details Requested

- This was a good start but was a little too one dimensional

- Simply looking at quantity did not provide any indication on the quality of the visits

- Was there a way to show visit/action quality in a snapshot view
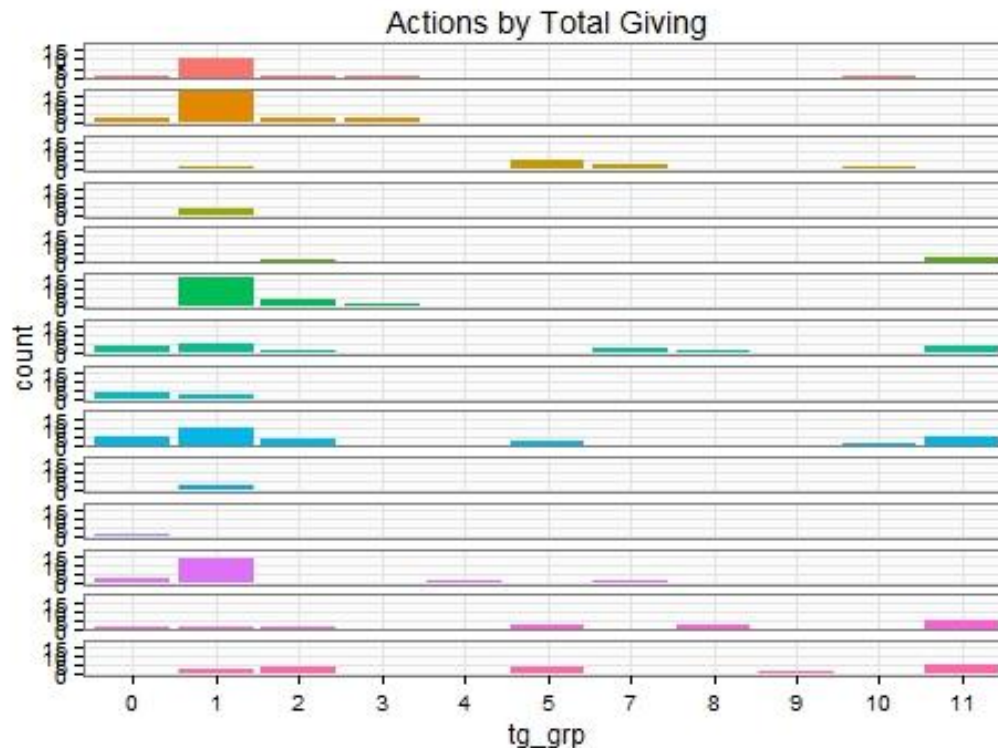
- This was my challenge…

Visits By Real Estate Tier

- The first visual was whether gift officers were meeting with constituents with the appropriate capacity related to their titles
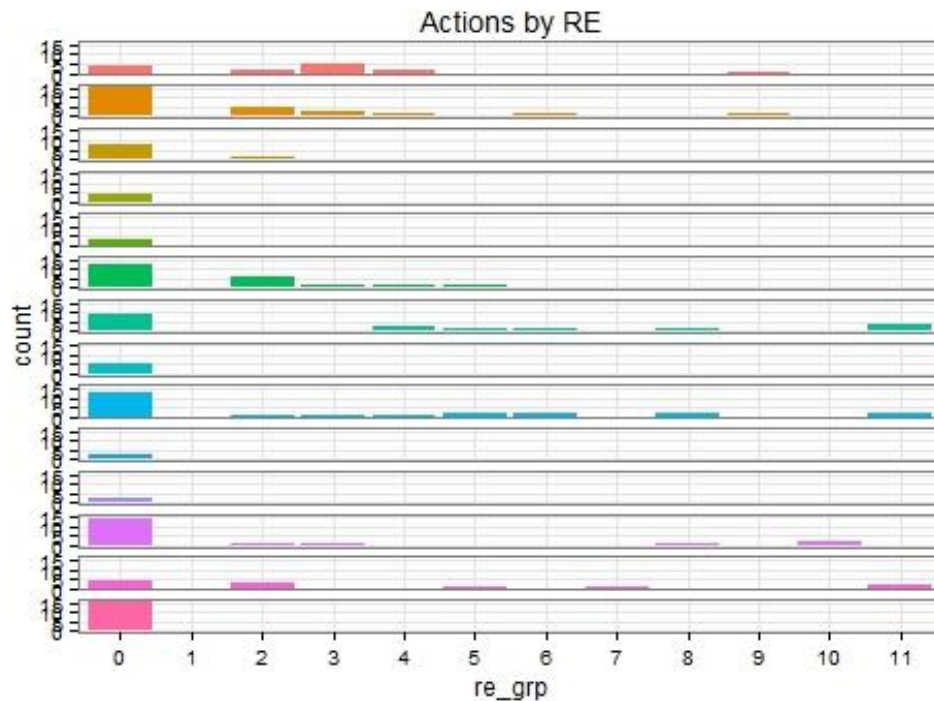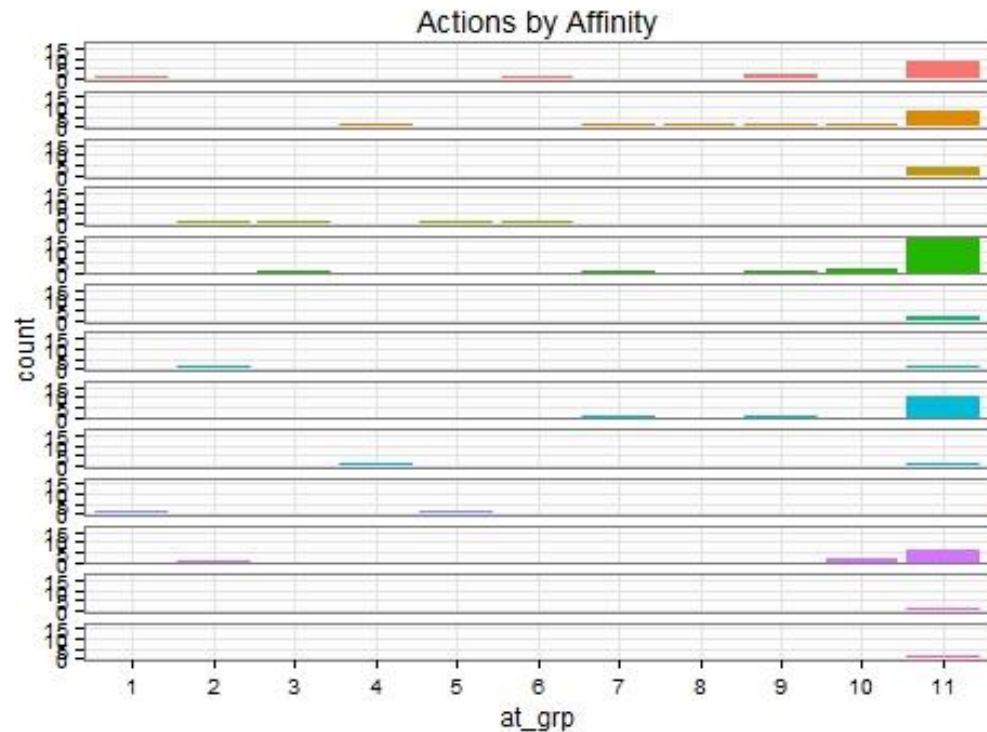
VISITS BY TOTAL GIVING

- What is the distribution of visits with regular donors, new donors and non-donors

VISITS BY AFFINITY/ENGAGEMENT SCORE

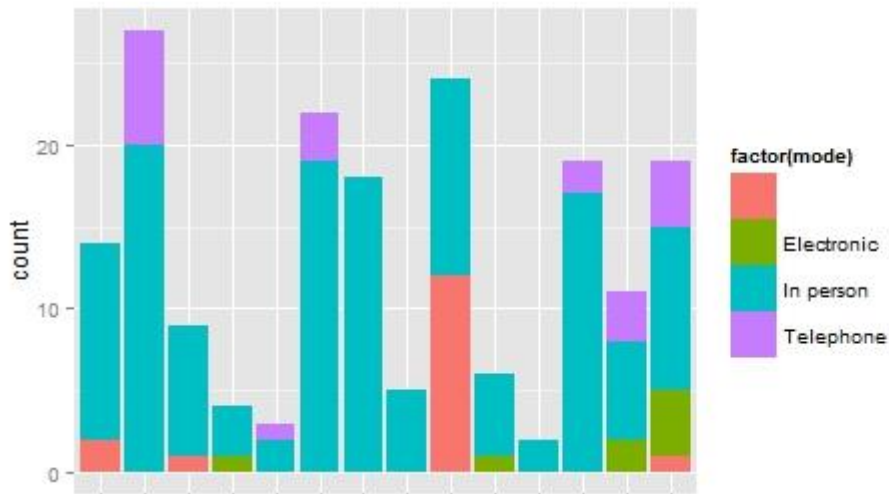- What is the distribution of visits related to a constituent's affinity score?

Actions by Affinity

VISITS BY CATEGORY

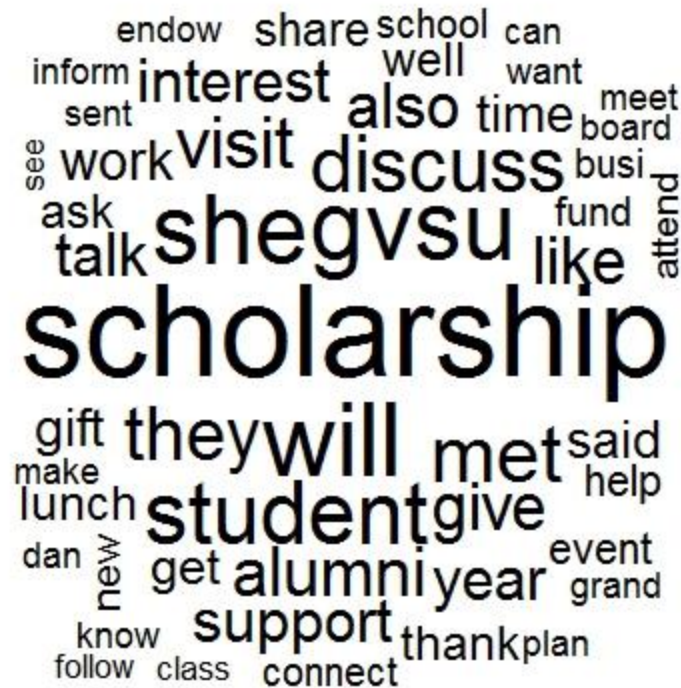- What is the distribution between the various action types?
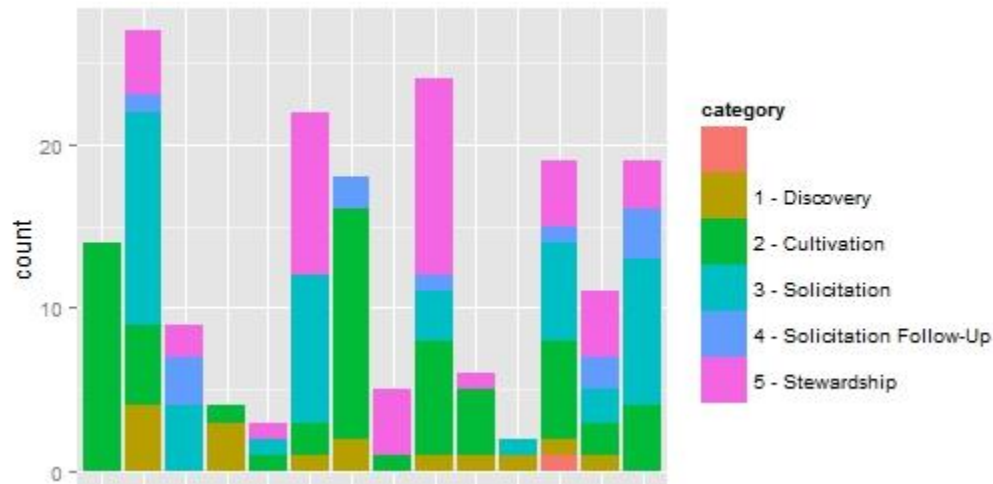
VISITS BY MODE

- What is the distribution of actions by mode?

VISIT WORD COUNT

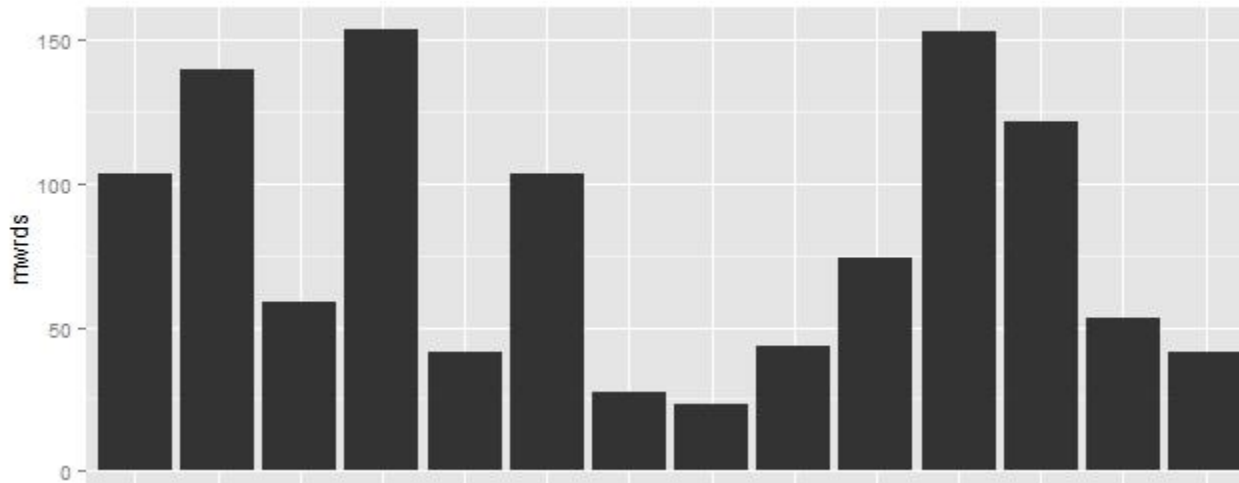- What are gift officers talking about?
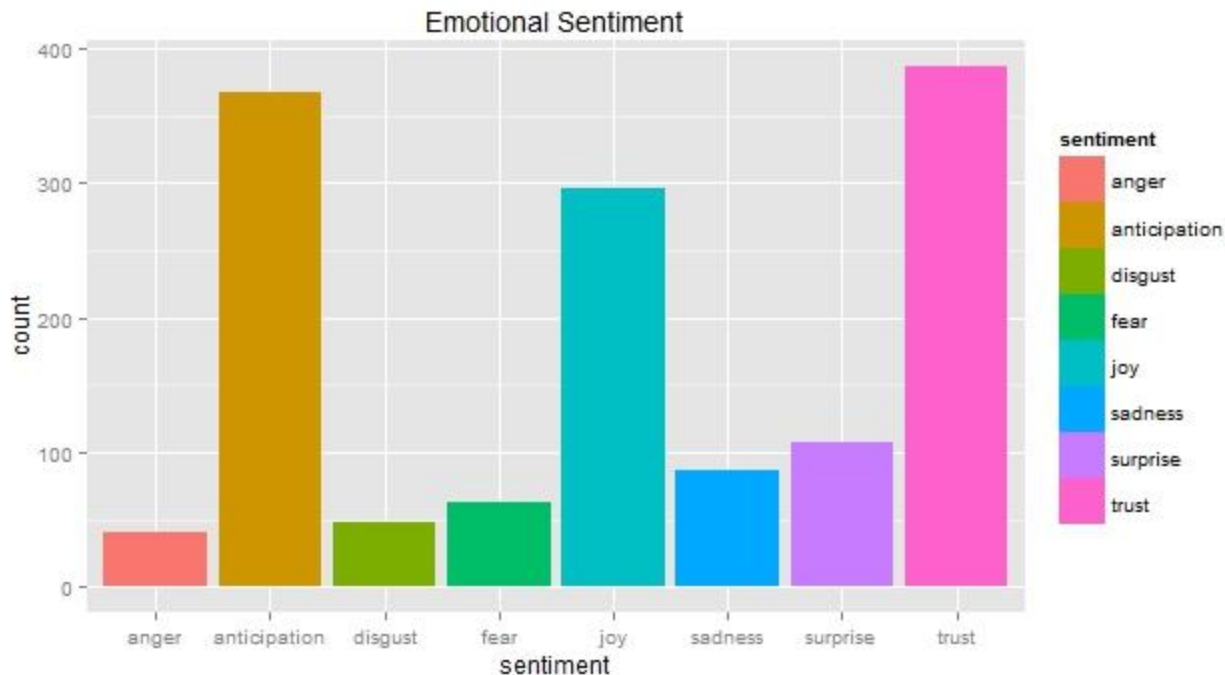
WORD COUNT (BY INDIVIDUAL)

Jackson

Visits By Word Count

- How complete are the action reports submitted by gift officers?

VISIT SENTIMENT ANALYSIS (EMOTIONS)

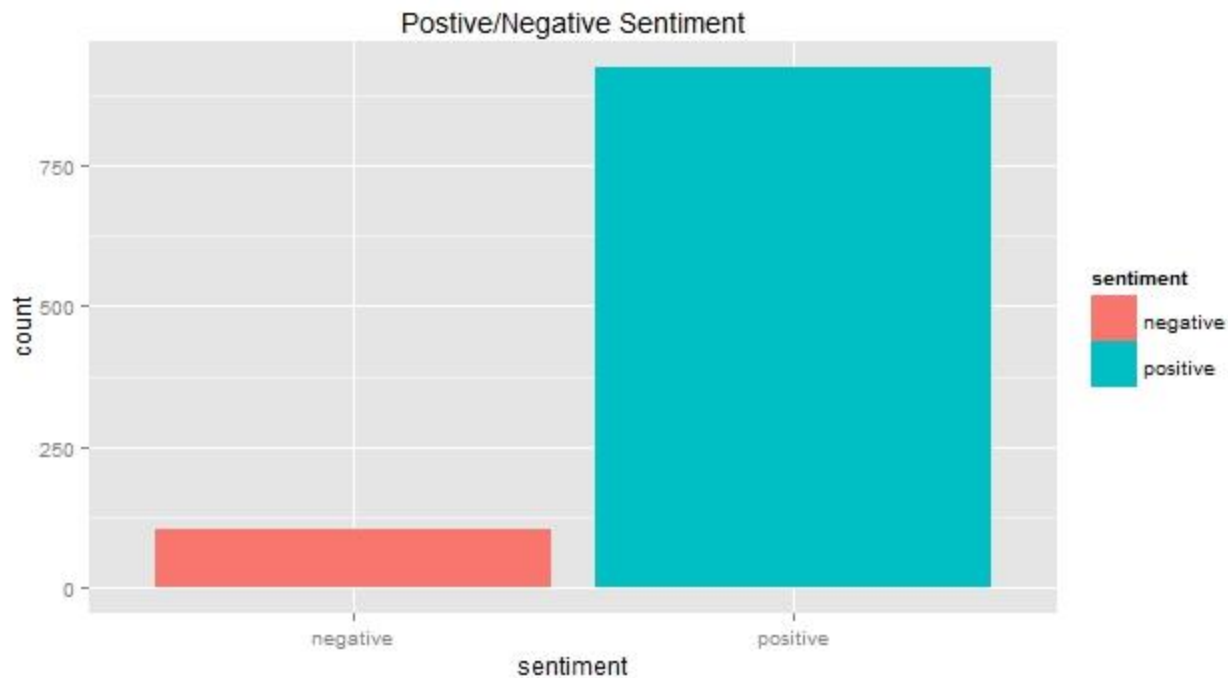- Map action reports to emotion categories. Take these results with a grain of salt.

Sentiment (By Gift Officer)
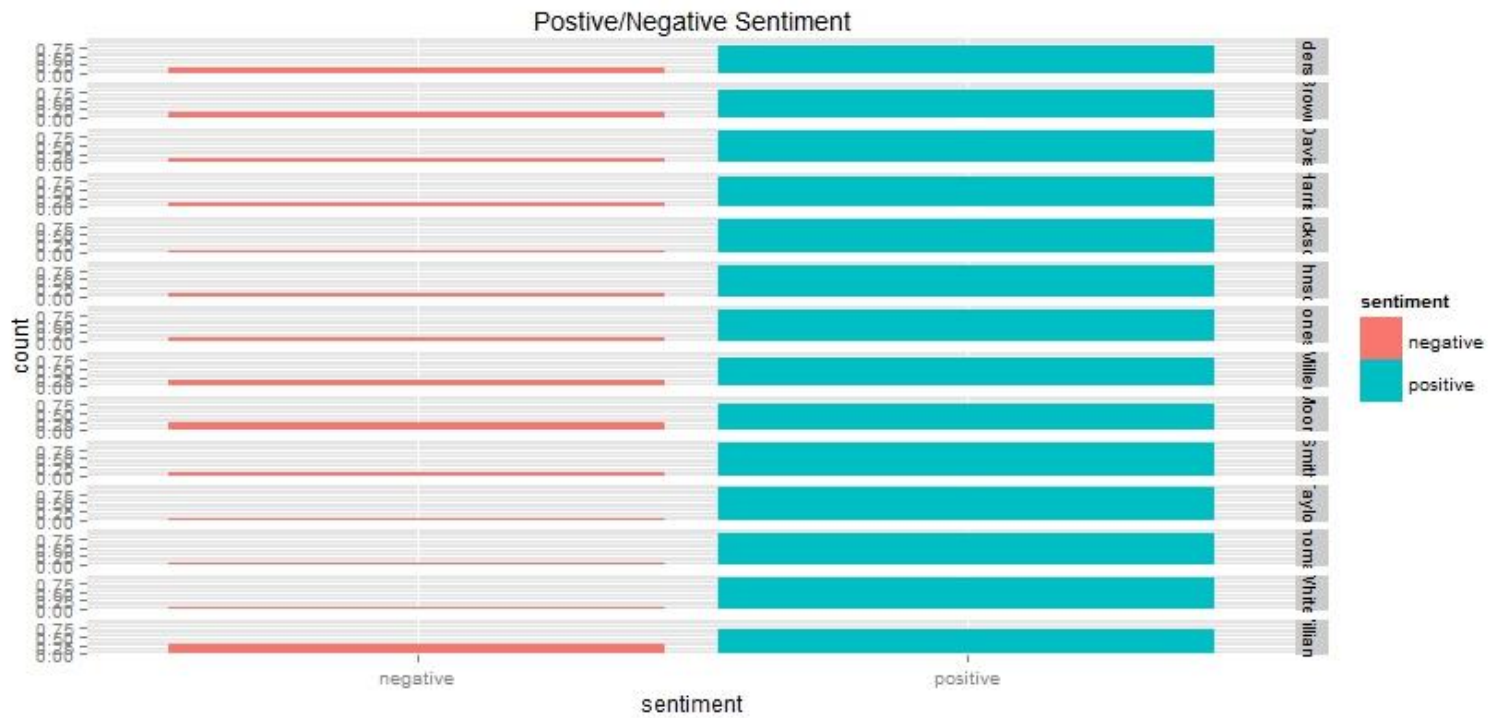
- Look for trends by officer.

Emotional Sentiment

VISIT SENTIMENT ANALYSIS (+/-)

- Are donor reports generally positive or negative?

+/- BY OFFICER

Postive/Negative Sentiment

CONCLUSION

- In addition to just counting actions and using that as the sole metric, these additional visuals allow for a deeper dive into the quality of the visits.

- Can help answer the following questions:
  - Are we meeting with constituents with the appropriate capacity and affinity?
  - Are we performing all the different visits required to meet current goals?
  - Are contact reports detailed?
  - Are we on message?
  - What is the general sentiment of visits?

RESOURCES

- Coursera: https://www.coursera.org/specializations/jhu-data-science

- Data Science Learning Club: http://www.becomingadatascientist.com/learningclub/

- Kaggle: https://www.kaggle.com/

- My GitHub (which will include code): https://github.com/michaelpawlus/fundraising_analytics

Any Questions?

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