**AES Metrics AI Project**

Our office maintains a database of all alumni, along with biographical and historical information, along with all of the ways the alumni continue to engage with the school.

Attached is a spreadsheet containing one row for each of the 15,906 living alumni who graduated in 1950 and after. We refer to each alumni as a 'constituent', and they are identified by a unique Constituent ID.

The spreadsheet contains the following biographical/historical data about each constituent:

* Constituent ID
* Constituency (can be one to many):
  + Alumni - attended the school for more than one year (possibly more than one term - need to check)
  + Alumni parent - both an alumni and a parent of a Lawrentian alumni
  + Non-grad - attended but did not graduate
  + Trustee - current
  + Trustee - former
  + Trustee Emeritus
* Solicit Code:
  + Do Not Contact - we do not initiate engagement in any way with these constituents. They may still initiate engagement with us
  + Do Not Solicit and Do Not Solicit Temp - we do not attempt to solicit donations in any way, but are still in contact about events, news, updates, etc.
* Address:
  + City
  + State
  + Zip
  + Country
* Class Year - the year the constituent graduated
* Parent Year - indicates if this constituent has a child attending/attended Lawrenceville. Includes parents of current students
* Circle/Crescent House & Circle/Crescent House #2 - house listed in our database as the constituent's circle/crescent house.

Then, the next columns are the Alumni Engagement Metrics.

The scores for Philanthropy, Experiential,and Volunteer, and Communications are compiled from the following data. These scores are cumulative throughout the fiscal year.

* **Philanthropy**:
  + Made a gift in FY25 (3 points for Participation gift, 5 points for leadership gift, 10 points for >$25k gift)
  + Made a pledge for FY25 or beyond (same points as above for pledge)
  + Member of JCG (1 point)
  + Member of 1810 Society (2 points)
* **Communications** :
  + Meeting, phone call, or email exchange with A&D staff (2 points for standard exchange, 5 points for in-depth exchange)
  + Joining LinkedIn Alumni Group (1 point)
  + Commenting on School Social Media post (2 points)
  + Submitting updated contact info to A&D (2 points)
  + Clicking on a mailchimp email and not unsubscribing (1 point max for the fiscal year - \*not cumulative\*)
* **Experiential**:
  + Attended an event ( 5 points for regular event, 10 points for Alumni Weekend or Home for Hill)
  + Attended an admissions tour (5 points)
  + RSVPed for event but did not attend (1 point)
* **Volunteer**: (10 points) for all, except for Volunteer interest expressed, which is 1 pont
  + Trustee, AAEC, Asia Council member (10 points)
  + Affinity Group leadership (10 points)
  + Class secretary, reunion committee member (10 points)
  + Giving society leadership (10 points)
  + Event Host, Event panelist (5 points)
  + Volunteer interest expressed (1 point)

At the end of each month, the above scores are calculated and summed together. Each category is capped at 10 points.The resulting values are summed to give the Alumni Engagement Score.

Then, each constituent is given an Alumni Engagement Rating based on the following ranges:

Score 0: Rating 0

Score 1: Rating 1

Score 2-4: Rating 2

Score 5-20: Rating 3

Score 21-39: Rating 4

Score 40: Rating 5

Our goal is to **maximize alumni involvement and philanthropic giving.**

We’d love your help exploring insights and building models that can help us prioritize outreach and tailor strategies.

 **Key Analyses we’d like to consider:**

**Philanthropy Prediction**

1. Build a model to predict which alumni are most likely to give based on available attributes.  
   *Goal: Identify high-potential donors for targeted outreach.*
2. **Engagement-Giving Correlation**Analyze how experiential, communication, and volunteerism scores relate to philanthropic scores.  
   *Goal: Understand which types of engagement most influence giving.*
3. **Segment Analysis by Class Year Group**Compare trends across Class Years.  
   *Goal: Inform different strategies by life stage.*
4. **Gender-Based Patterns**Explore any trends by sex in giving and engagement.  
   *Goal: Personalize outreach strategies.*
5. **Geographic Trends**Identify regions or states with high or low engagement/giving.  
   *Goal: Prioritize regions for events or campaigns.*
6. **Clustering / Persona Creation**Use AI to group alumni into natural segments based on scores and demographics.  
   *Goal: Develop personas to guide strategy.*
7. **Gap Analysis**Find alumni who are highly engaged but not giving — or giving without other forms of engagement.  
   *Goal: Target specific groups for conversion or retention.*
8. **AI-Based Action Recommendations**(If possible) Suggest next-best actions for each alum (e.g., volunteer invite, event, giving appeal).  
   *Goal: Enable personalized, scalable outreach.*