

# DONOR SEGMENTATION STRATEGIES FOR UNIVERSITY ACQUISITION CAMPAIGN

Applying the 80/20 Rule for Effective Donor Engagement

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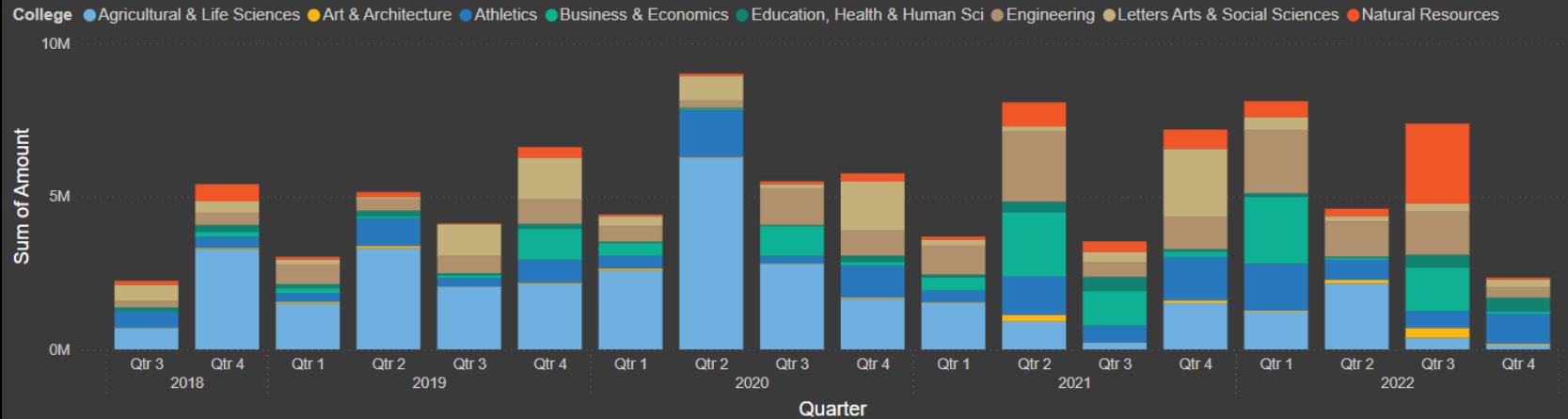
Eric Mack

6/1/2024

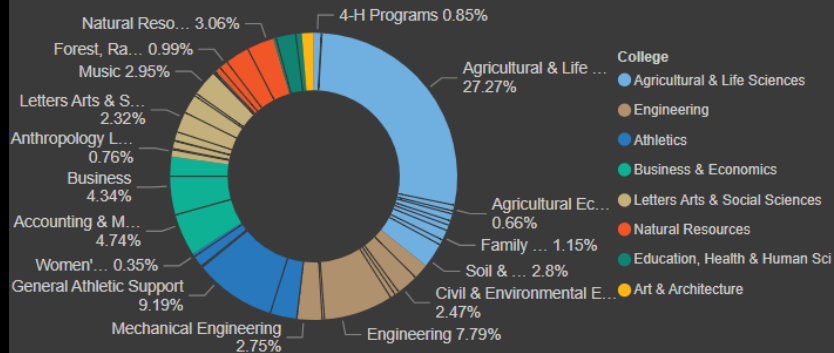
# INTRODUCTION

- We will outline our process and analysis of this historic giving data in the formation of a current market segmentation plan. This plan will be used to inform new campaign strategies for targeting new gift acquisitions.
- We will import data into Power BI to create an interactive segmentation exploration tool.
- Results from this exploration will in turn help to target donor pools and target ask numbers.

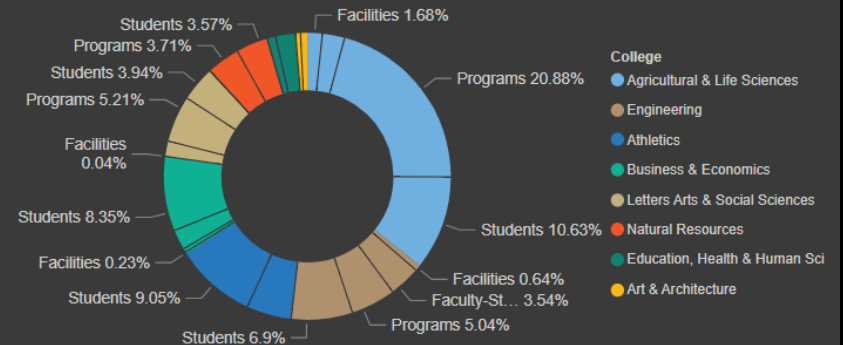
## Donation Amount by College



## Donation by College and Dept



## Donation by College and Purpose



# DATA OVERVIEW

Project data comprised of three separate spreadsheets:

- Spreadsheet 1: Contribution and segmentation data associated to a unique ID number referenced across all data sets
- Spreadsheet 2: Contact information such as donor's name, address, and additional details
- Spreadsheet 3: Partner relations data for generating friendly emails and resolving cross-referencing inconsistencies resulting from donations coming from one or the other spouse

Key fields available within the data set about the donation include: amount, and the designated College, Department, and Purpose of Gift

Key fields about the donors include: date and frequency of donation made, Donor Marital Status, Affiliation with College, and Association

Desired but unavailable data includes previous campaigns and their success with each client. Together with the cost of their outreaches, we would be able to compute ROI as well as better judge the likelihood of future success in gift acquisition.

# SEGMENTATION STRATEGY

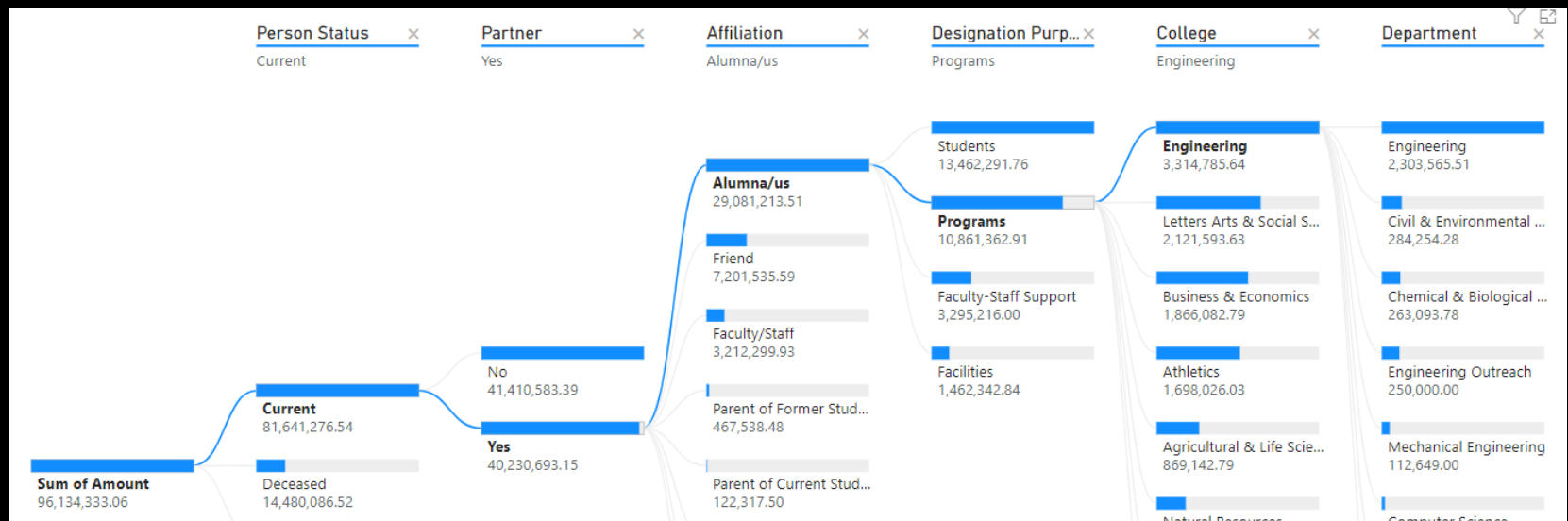
## Data Cleaning Before Merging:

- Correcting duplicates in the names file.
- Removing redundant fields from the data to enhance market segmentation.
- Standardizing the primary ID column spacing across the three spreadsheets to ensure consistency for successful merging.
- Observe deceased donor patterns, but then remove from the pool.

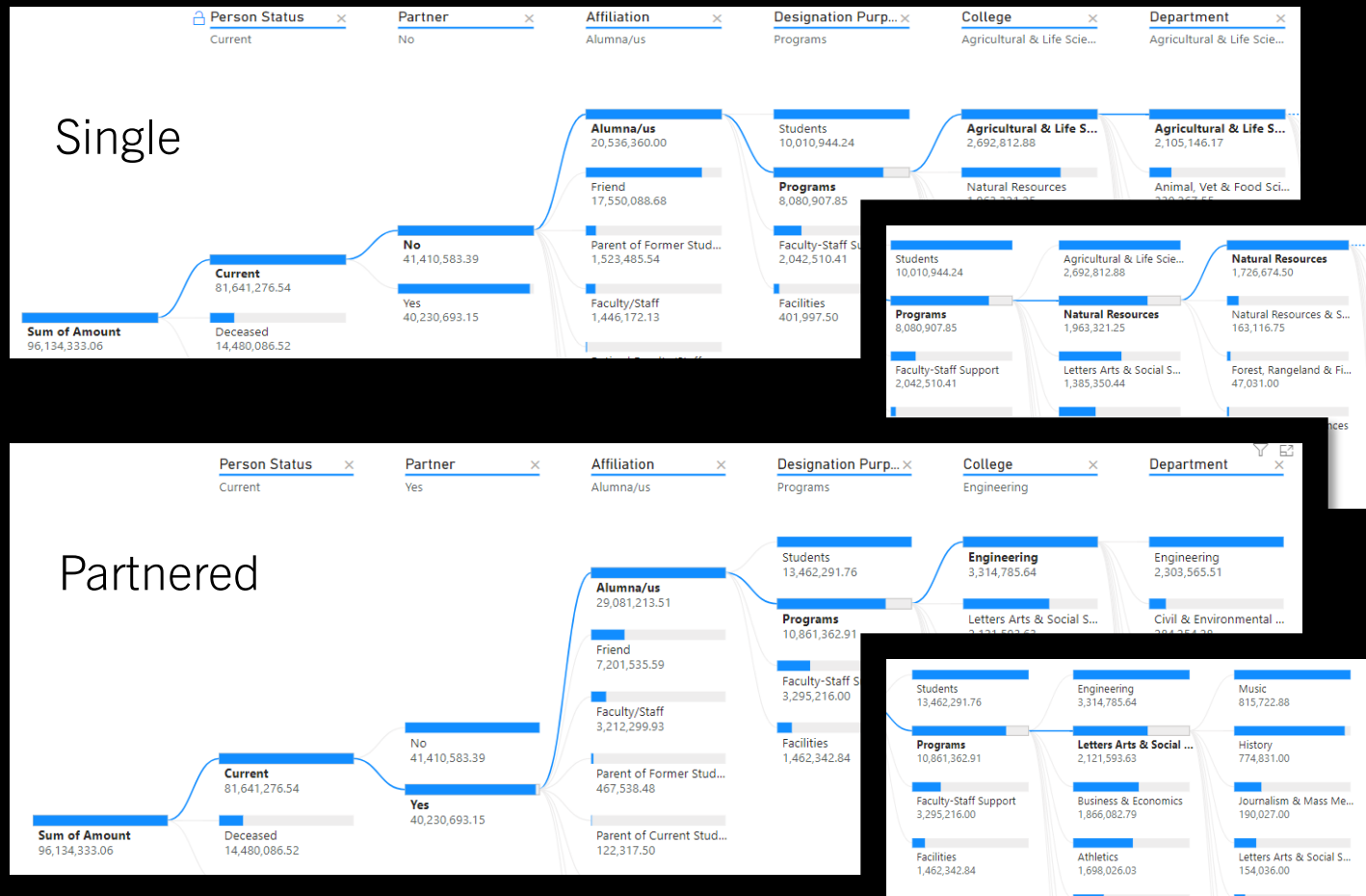
We will apply the 80/20 rule and segment the data by net amount of donation in sliced subcategories.

# SEGMENTATION VARIABLES

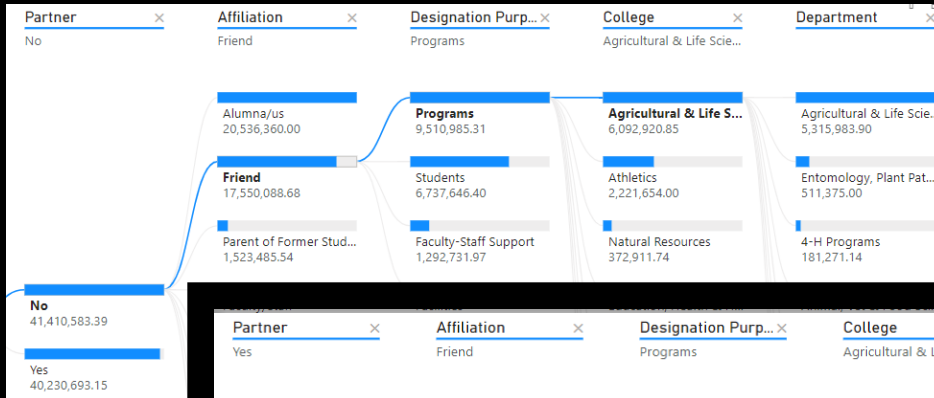
We will use a tree diagram to branch the total donations by Person status, Partner status, Affiliation, Purpose, College, and finally Department providing a useful way to see where the most donations were going. Ordering was chosen to minimize number of nodes in early splits.



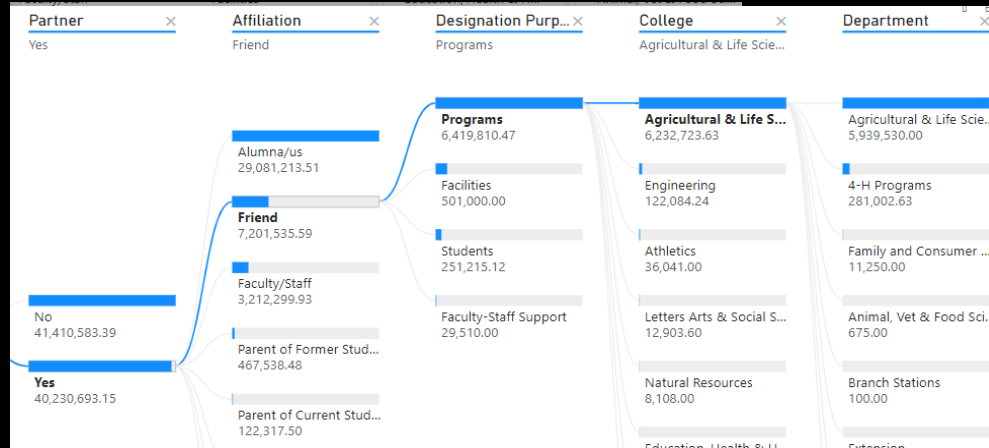
# PROGRAM LEVEL OBSERVATIONS OF LIVING ALUMNI



# PROGRAM LEVEL OBSERVATIONS OF LIVING FRIENDS OF THE UNIVERSITY

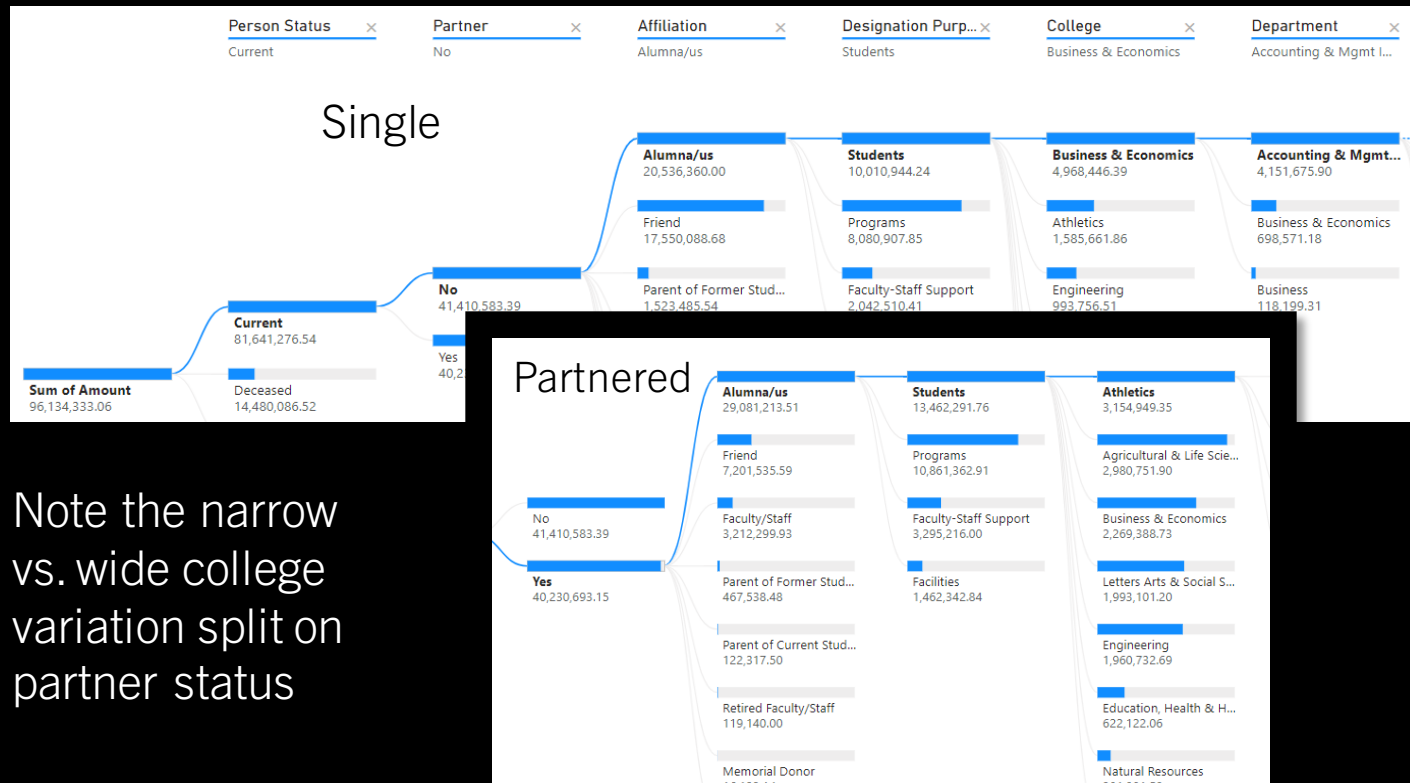


Overall support is consistently given to Ag and Life Sciences regardless of partner status.



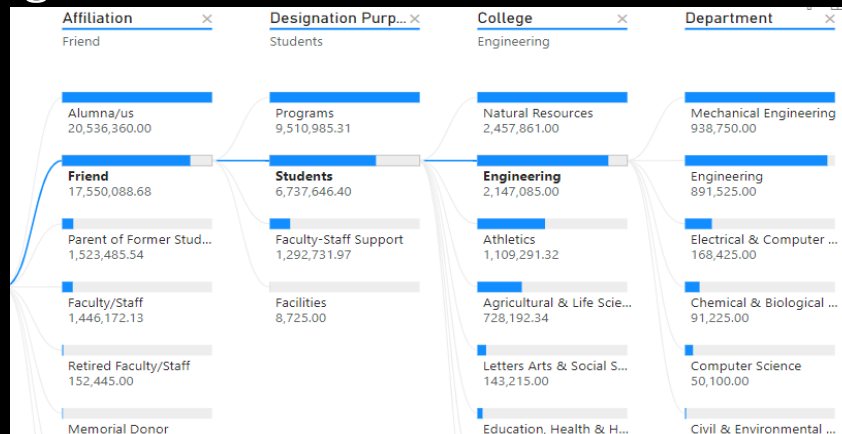


# OBSERVATIONS ON ALUMNI GIVING TO STUDENTS



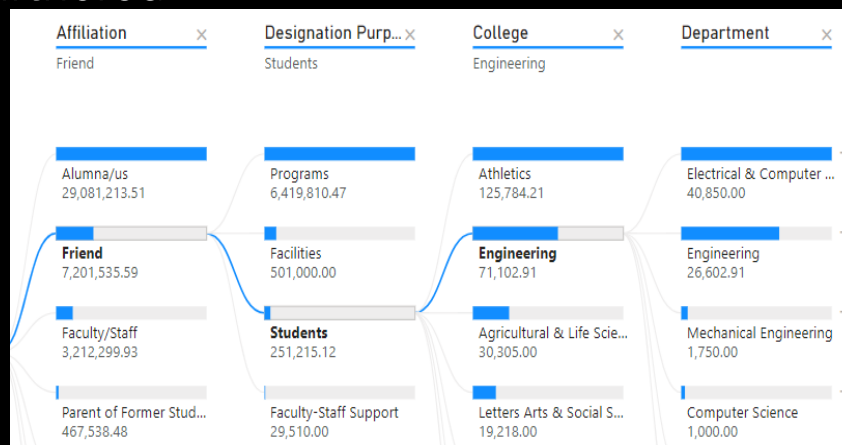
# GIFTS DIRECTED TO STUDENTS BY FRIENDS OF THE UNIVERSITY

Single



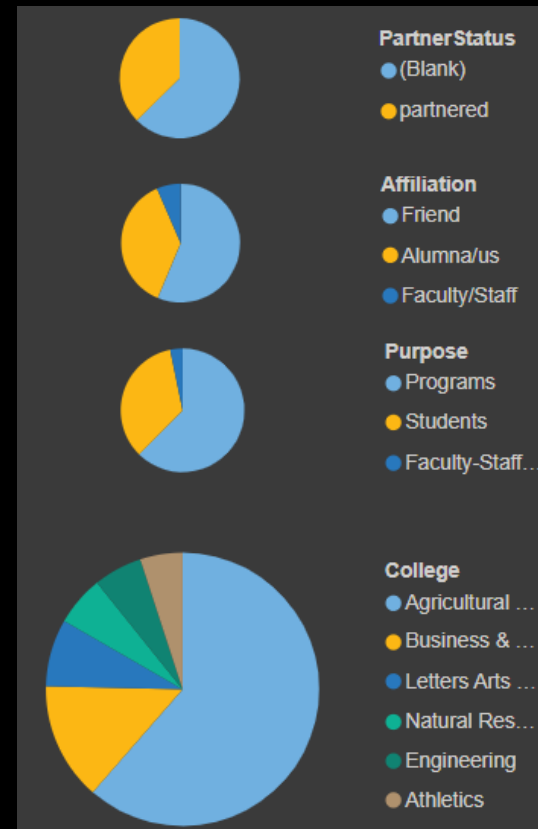
Single and married donors support Engineering, but single donors favor Natural Resources while partnered donors favor Athletics (Note: student support in general is much lower for partnered Friends.)

Partnered



# KEY FEATURES OF MAJOR DONORS

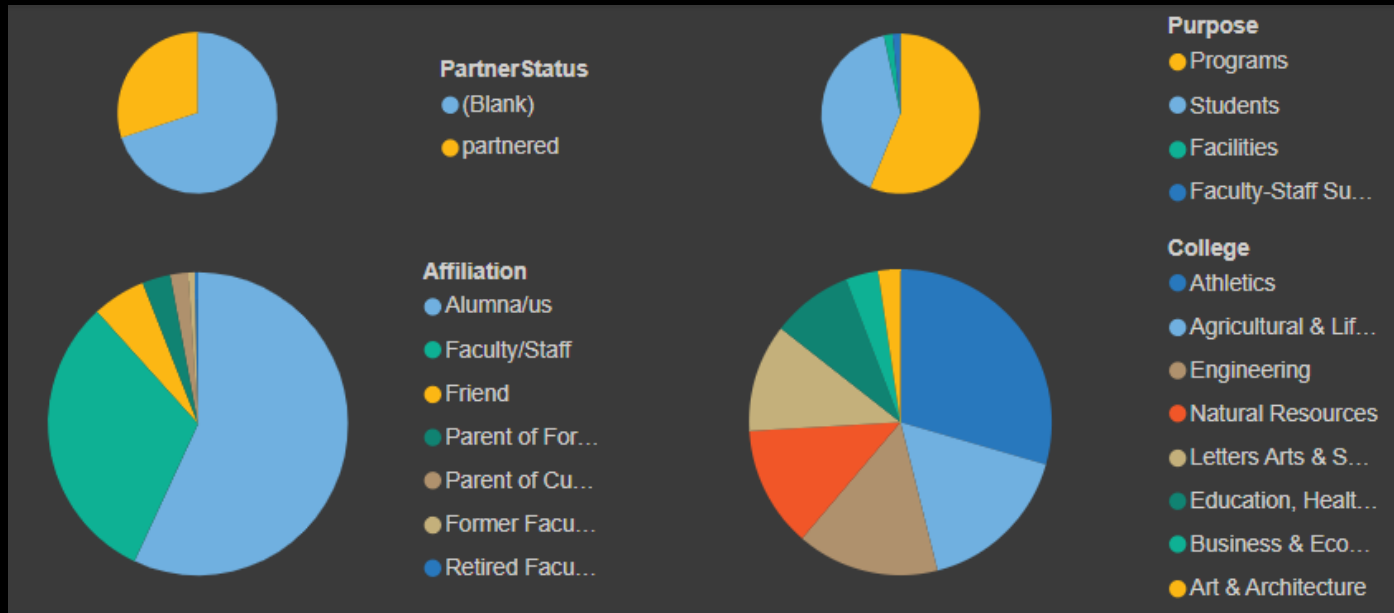
- Most live in ID, most are alumni or friends
- Directed to Ag/ Life Sci and Business colleges
- More single than partnered
- Very large one-time donations come more often from single Friends of the college
- Average donation amounts > \$1m



# KEY FEATURES OF MAJOR DONORS

First Name	Last Name	Partnerstatus	College	Affiliation	Total Amount	# of Gifts
Jacqueline	Cooley	partnered	Agricultural & Life Sciences	Friend	6,547,000	11
Mary	Colt	partnered	Agricultural & Life Sciences	Friend	5,300,000	1
Brianna	Hudson		Business & Economics	Alumna/us	4,201,823	18
Nigel	Horne		Agricultural & Life Sciences	Alumna/us	3,210,720	3
Jabari	Molly		Natural Resources	Friend	2,396,500	7
Cheyenne	Theodore		Agricultural & Life Sciences	Faculty/Staff	2,369,055	8
Nathanial	Santana	partnered	Business & Economics	Alumna/us	2,365,000	9
Dereon	Powers		Business & Economics	Friend	2,315,000	6
Niko	Ramsey	partnered	Letters Arts & Social Sciences	Friend	2,050,050	10

# KEY FEATURES OF LOYAL DONORS



(charts show freq of giving not amount)

- Most live in ID
- Made up mostly Alumni and Faculty/Staff
- Directed to Engineering and Athletics
- More single than partnered
- Donations are modest but regular (monthly or more freq. is common)

# KEY FEATURES OF LOYAL DONORS

First Name	Last Name	State	College	Affiliation	Total Amount	# Of Gifts
Grace	Pace	ID	Engineering	Alumna/us	11,545	316
Stephen	Montoya	ID	Agricultural & Life Sciences	Faculty/Staff	1,205	231
Lauren	Kent	ID	Education, Health & Human Sci	Alumna/us	1,770	231
Melina	Gutierrez	ID	Agricultural & Life Sciences	Faculty/Staff	20,457	192
Zachary	Bright	ID	Letters Arts & Social Sciences	Alumna/us	880	170
Yasmine	Brewer	ID	Agricultural & Life Sciences	Faculty/Staff	3,843	132
Zion	Addison	ID	Art & Architecture	Faculty/Staff	48,938	130
Keyon	Lara	ID	Engineering	Alumna/us	5,665	125
Zion	Stephanie	ID	Athletics	Alumna/us	1,134	119
Yasmine	Alexander	ID	Athletics	Alumna/us	4,768	118

# CAMPAIGN STRATEGIES

Cross reference with tree sort diagram to target college and purpose.

## Major Donors

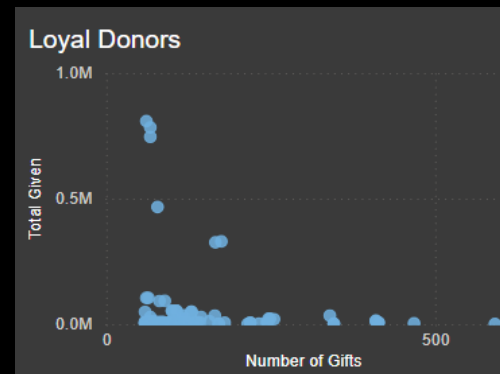
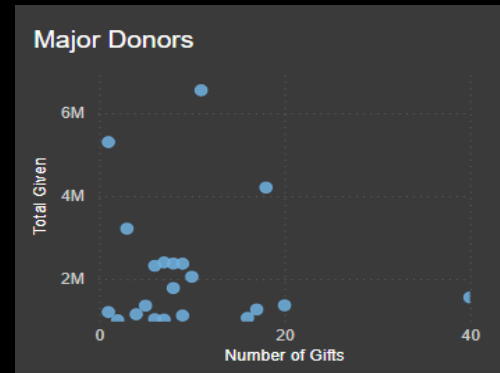
- Personalized outreach and recognition
- Tailored proposals for large gifts

## Loyal Donors

- Regular updates and engagement
- Matching gift opportunities

## One-time top Donors

- Specific campaign appeals
- Highlighting impact of past donations



# ENGAGEMENT TACTICS

- Major Donors: Exclusive events, personalized letters
- Loyal Donors: Newsletters, impact reports
- One-time Large Donors: Targeted campaigns, project updates



# SUMMARY OF RECOMMENDATIONS

- Prioritize segments with highest potential (Major and Loyal Donors)
- Develop tailored communication strategies for each segment
- Use data to refine and adjust strategies over time (slice out deceased and one-time donors to get a more accurate sense of normal flow and trends)

# CONCLUSION

Importance of targeted donor engagement: It is important to make the right kinds and sizes of ask. To do this we need to know our audience.

There are a few very large one-time donations. While these are amazing and should be courted the data does not suggest these should be included in our segmentation for seeking recurring gifts.

Our biggest givers consistently target Ag/ Life Sciences, Business, and Engineering.

- Single donors also favor Natural Resources.
- Partnered alumni donors also favor Athletics and Music.

# Q&A

