

THE POWER OF DOING

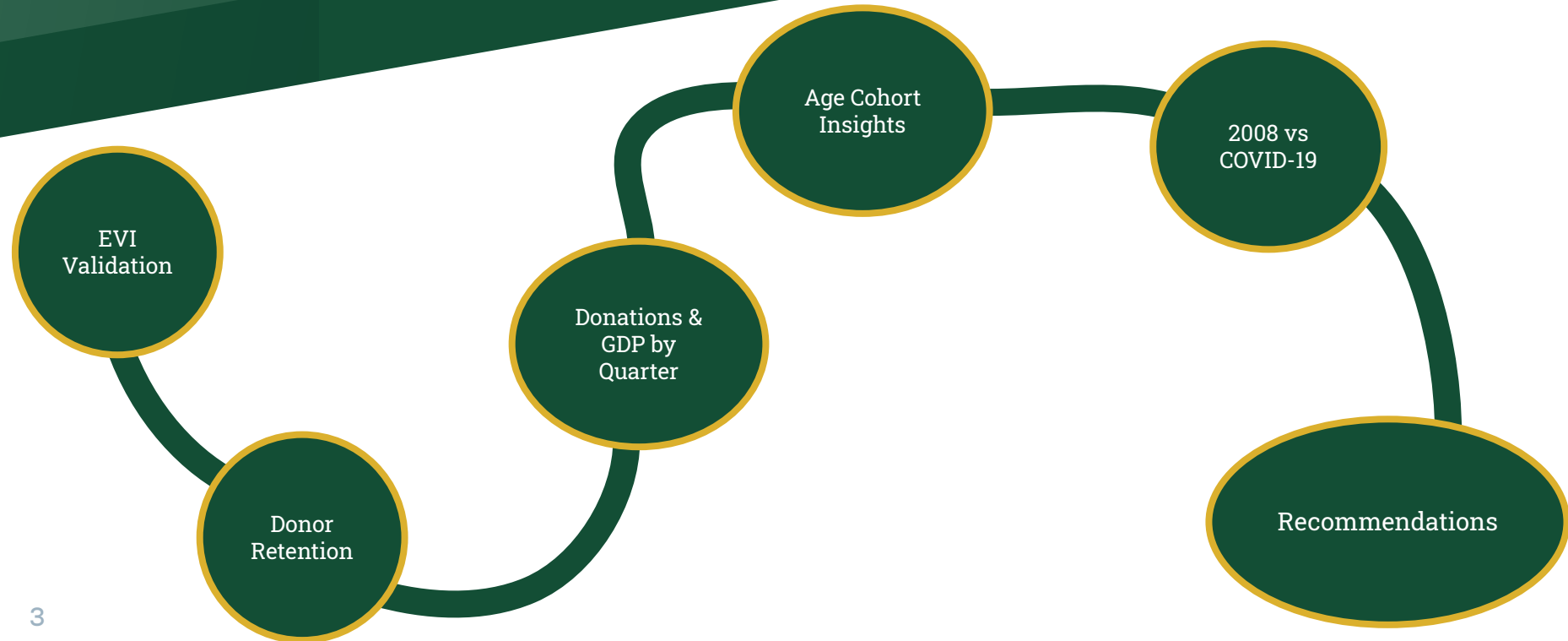
The Campaign *for*
Learn by Doing

Cal Poly Giving

Cal Poly Giving Final Insights

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Project Roadmap



Winter Quarter Recap

- Uploaded the dataset
- Cleaned the dataset
- Validated or invalidated various scores
- Market research to see how Cal Poly lines up with other universities

Market Research

2018-2019 Alumni Donor Support	Number of Addressable Alumni	Alumni Solicited	Alumni Donors	Total Alumni Contributions
San Francisco	303,823	13,493	2,245	\$15,369,460
San Diego	472,222	196,072	15,738	\$14,190,554
San Luis Obispo	202,369	116,193	5,931	\$6,422,700
Fresno	200,966	115,251	6,554	\$4,315,381
San Jose	259,685	217,695	3,493	\$3,343,500
Long Beach	318,816	188,666	8,839	\$3,100,171
Northridge	361,197	257,866	11,525	\$2,876,304
Fullerton	270,539	232,193	6,467	\$1,161,828
Total	2,389,617	1,337,429	60,792	\$50,779,898

Validation

Net Worth

**Wealth Engine
Classification:
GCR**

MG EVI

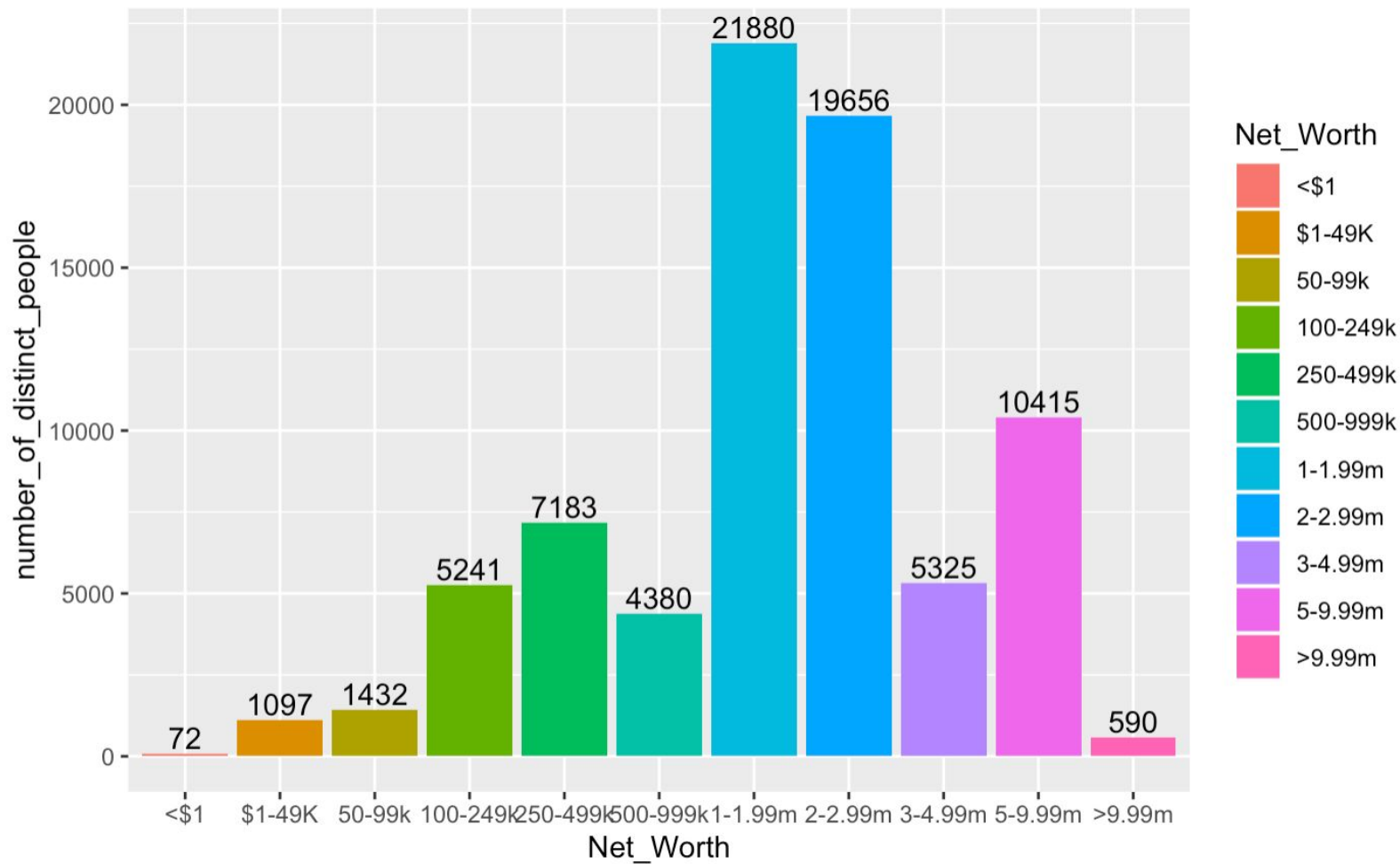
The Goal

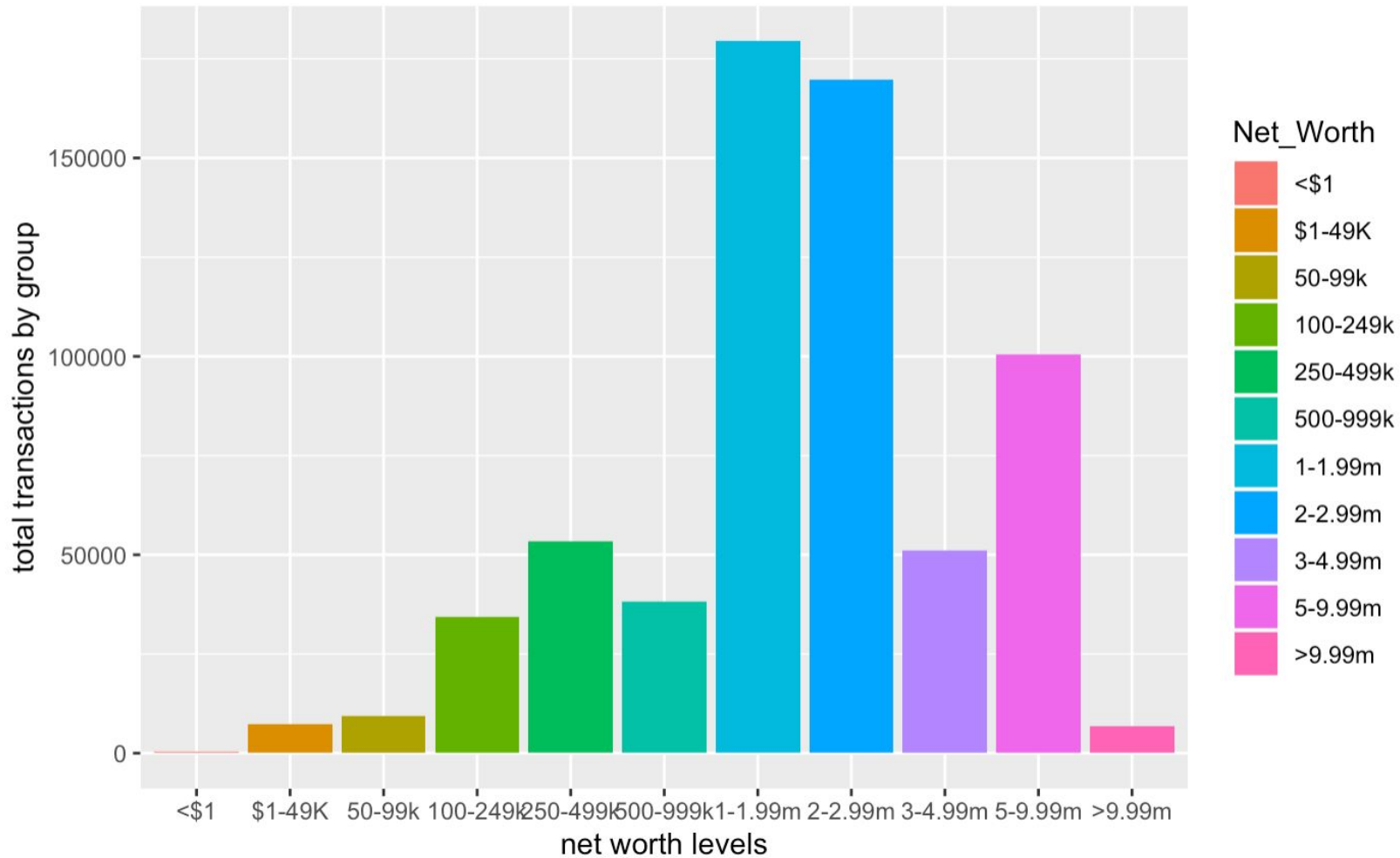
After validation of the three metrics, identify which metric, if any, should be used to prioritize the giving team's engagements.

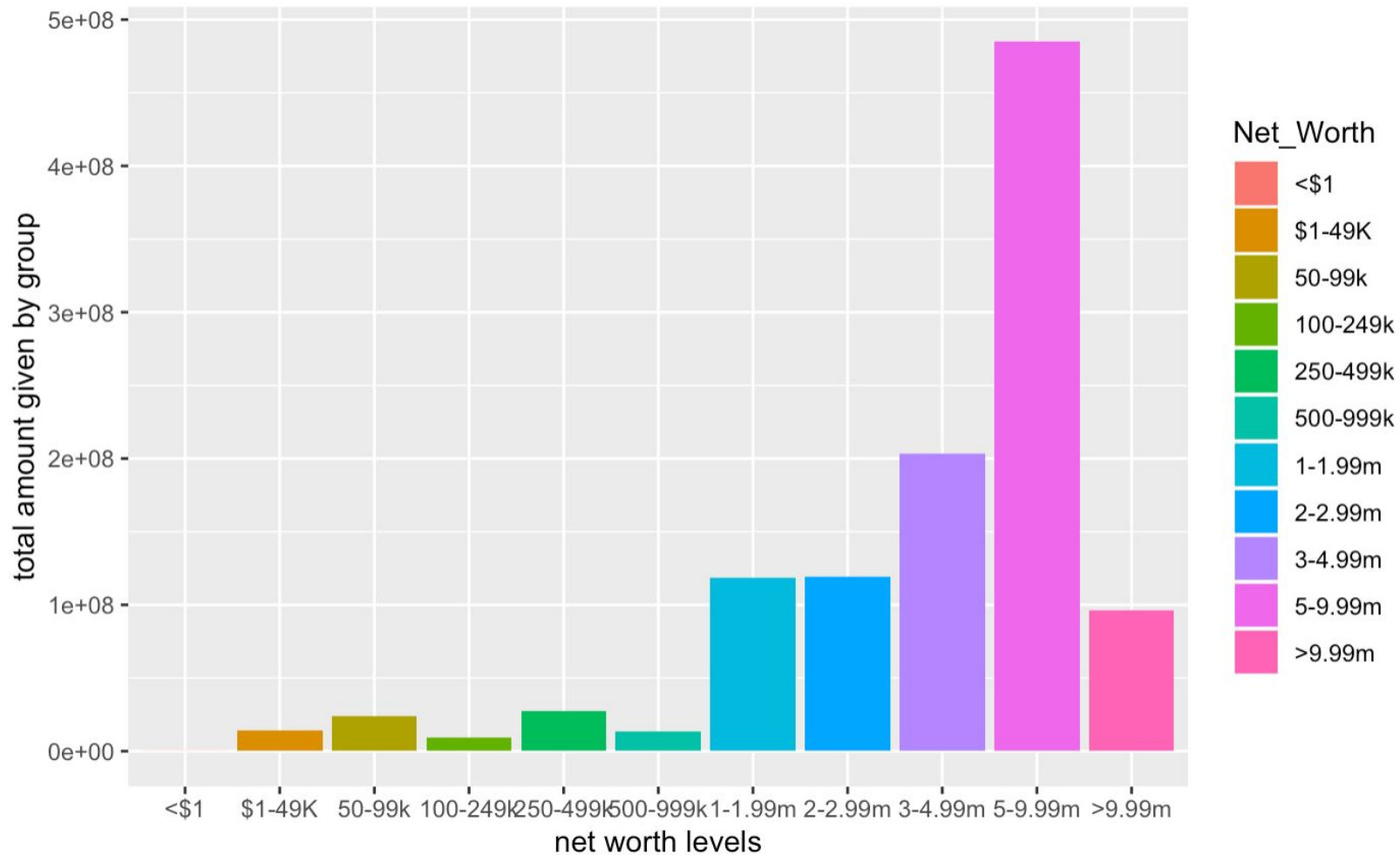
If none of the metrics are effective in identifying important clients, create the metric.

'Net worth' Exploration

Is there a significant difference in what each net worth group is giving?







‘Wealth Engine Classification’ Exploration

Is the fundraising team missing out on potential people by just looking at the top categories?

GCR Wealth Score

\$87,441,281

for those not contacted.

\$65,443,447

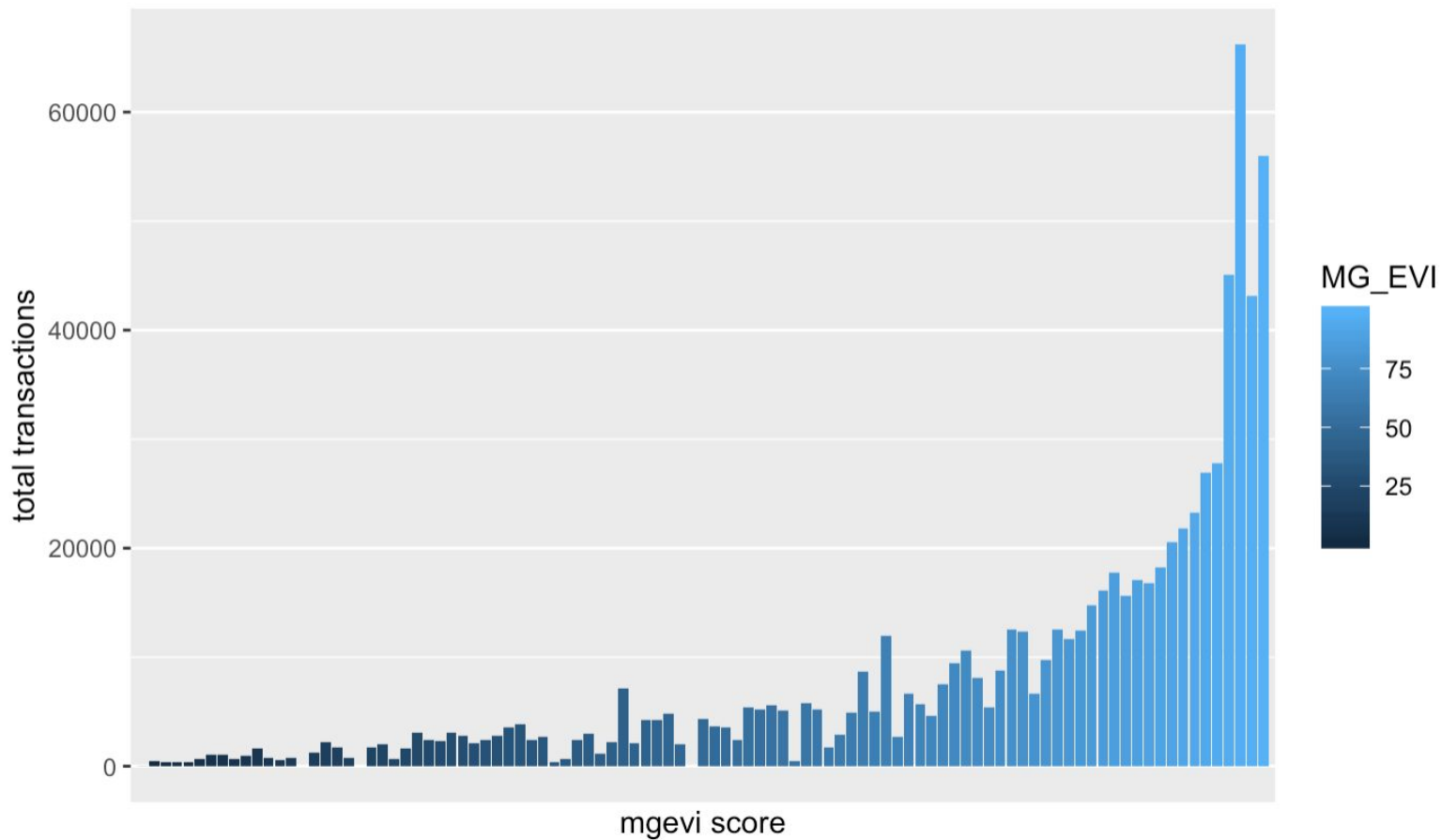
of that sum is from entities
who could not be scored.

The inconsistent availability of wealth scores makes them unreliable.

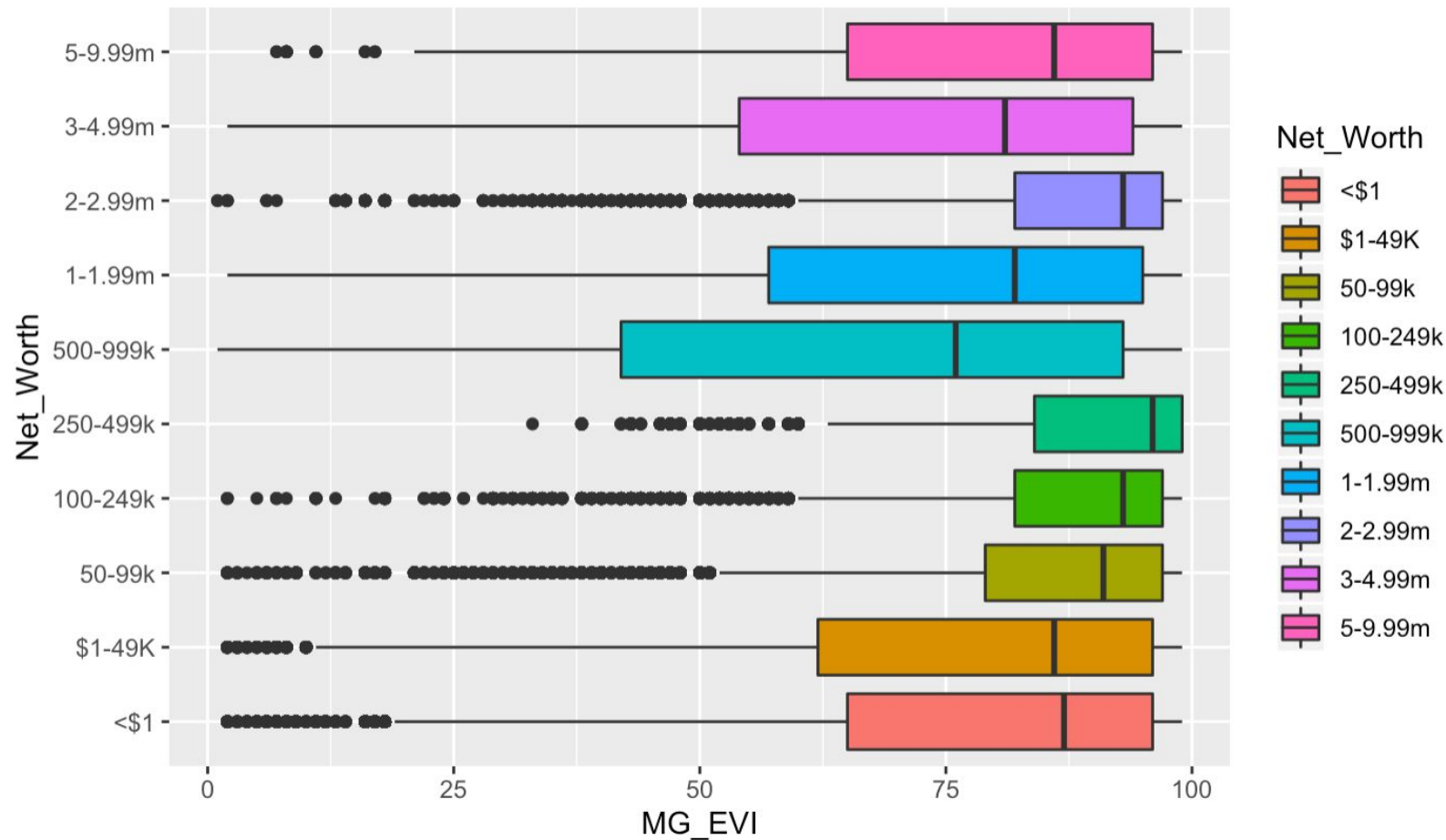
'MG_EVI score' Exploration

What is this score dependent on? Is the fundraising team missing out on potential givers by only looking at the top scores with total given > \$25k?

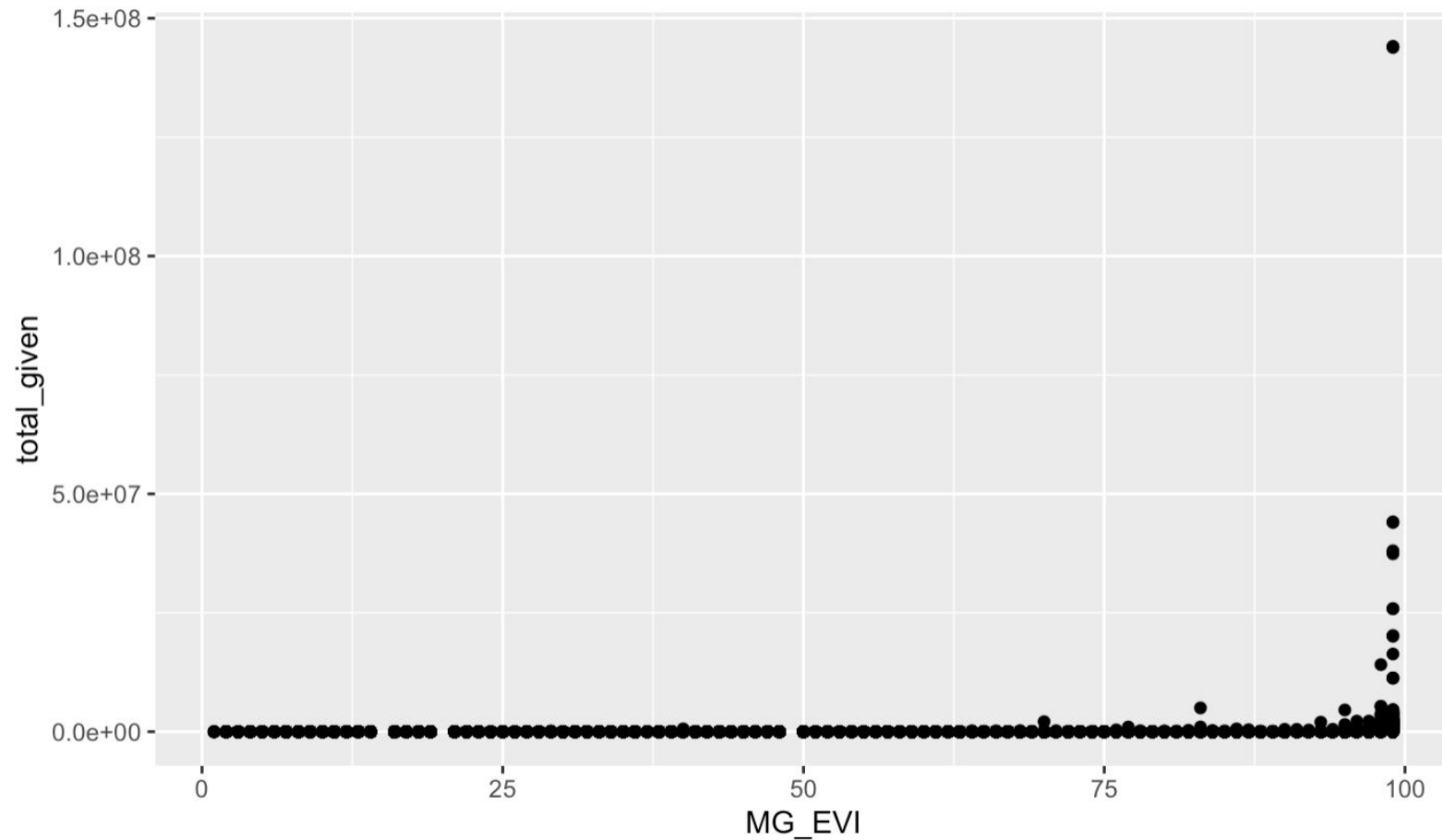
Effect of MGEVI score on Transactions



Boxplots of MG_EVI distribution for each Net Worth Group

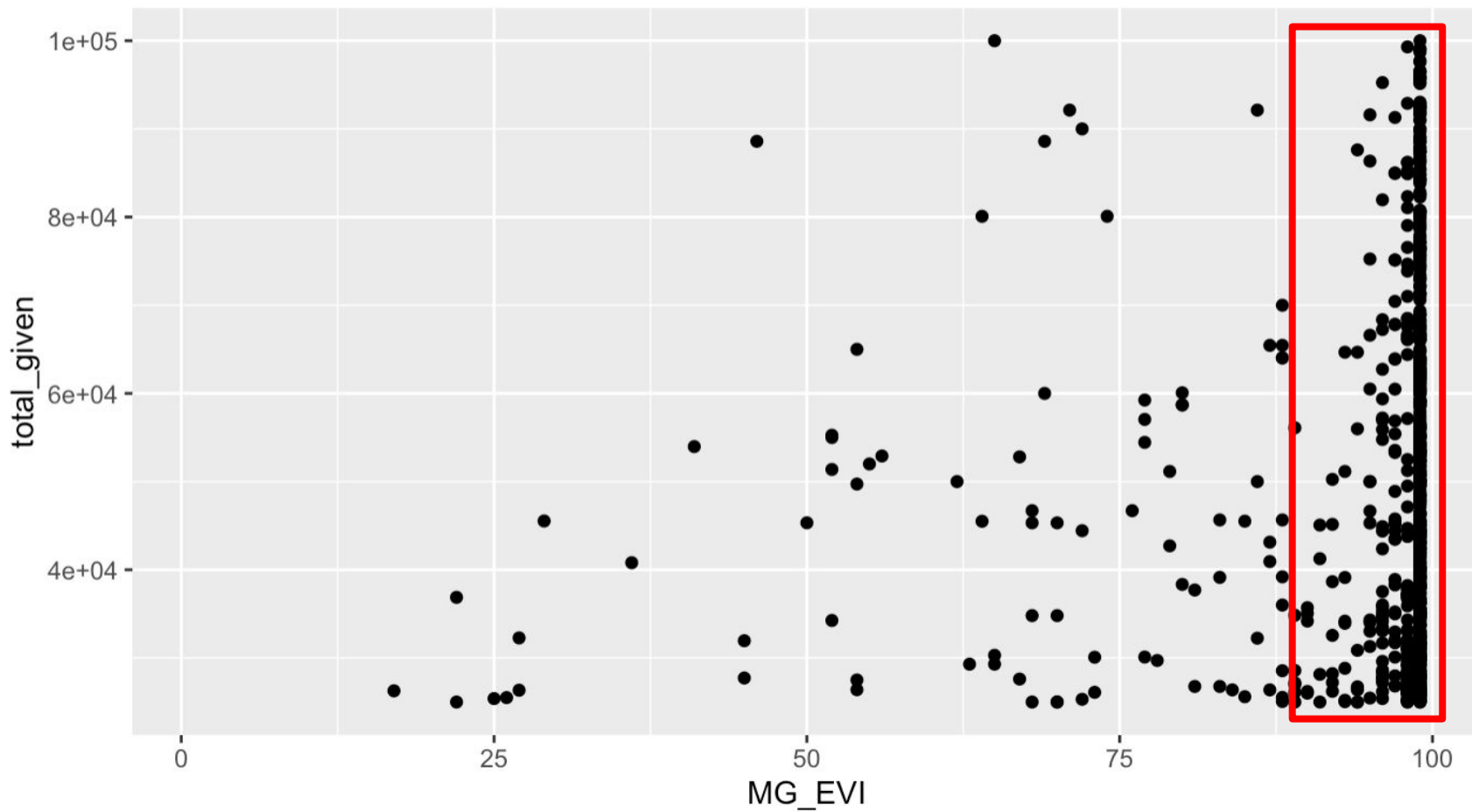


Distribution of MG_EVI scores

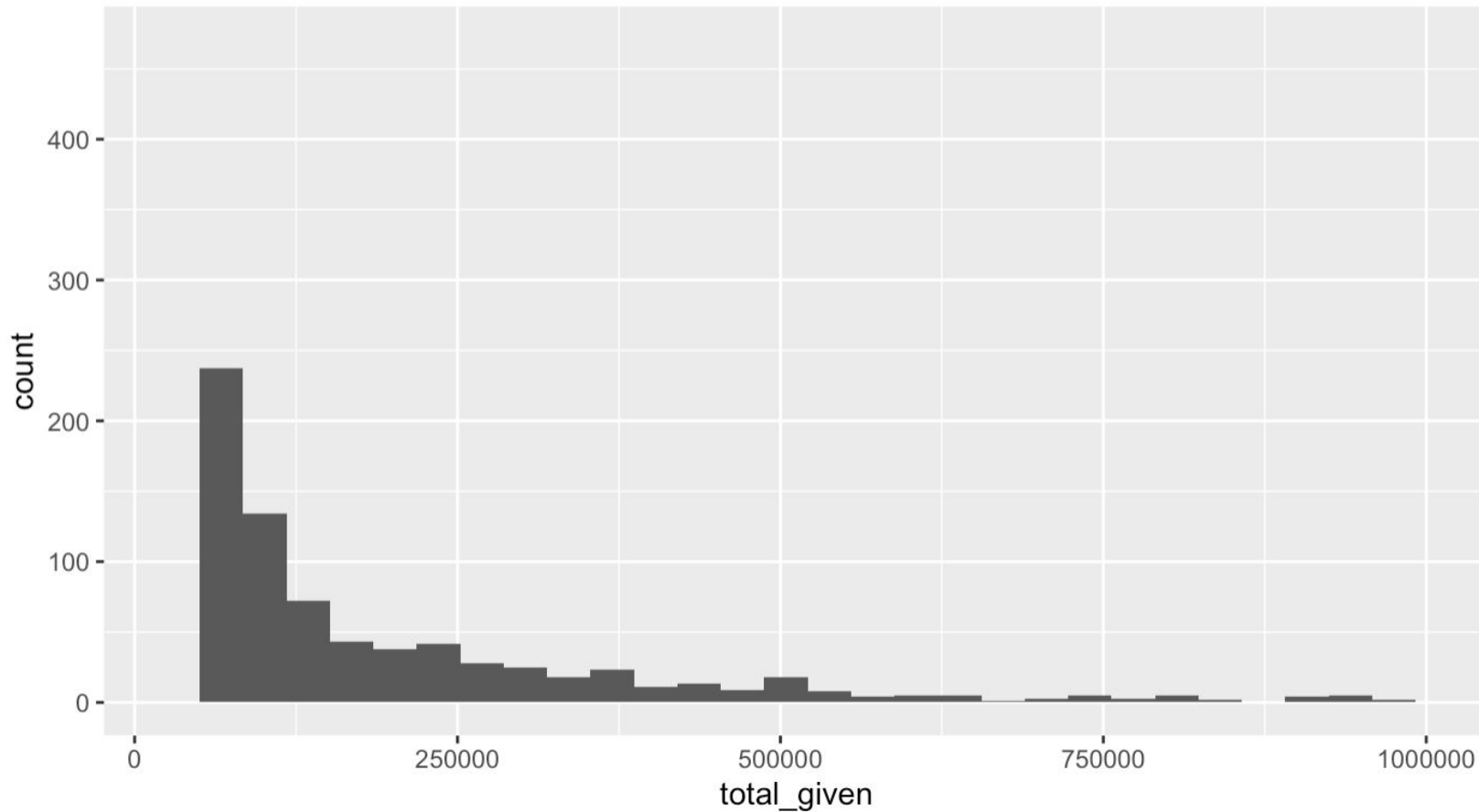


Distribution of MG_EVI scores

Total given is between 25-100k

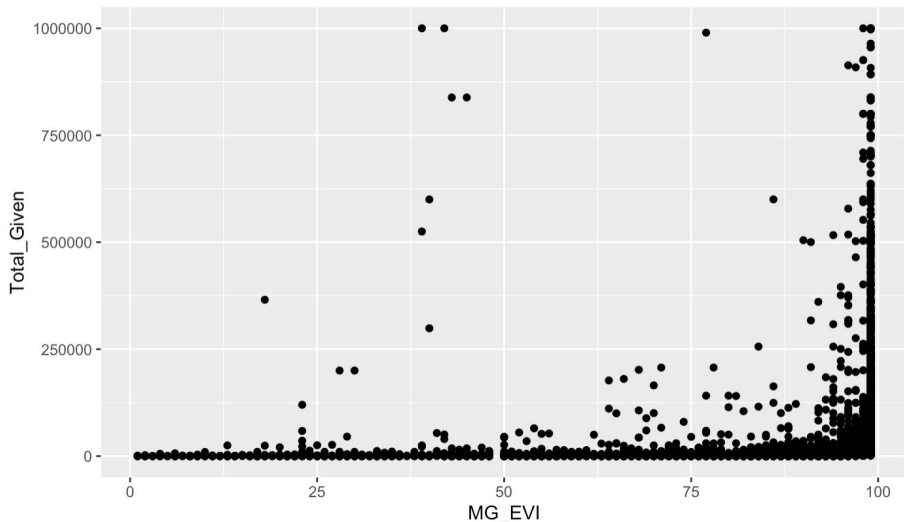


Distribution of MG_EVI ≥ 90
Entities who have donated over 25k

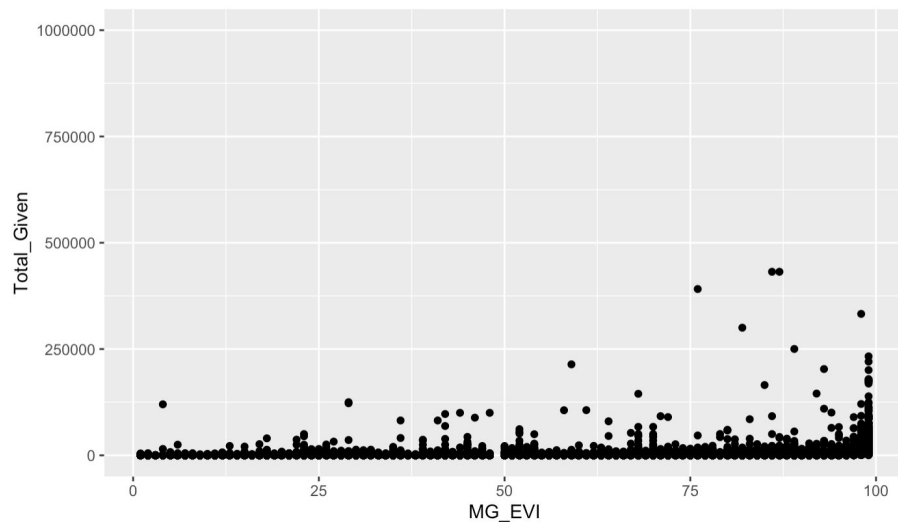


Total Given

Entities Contacted

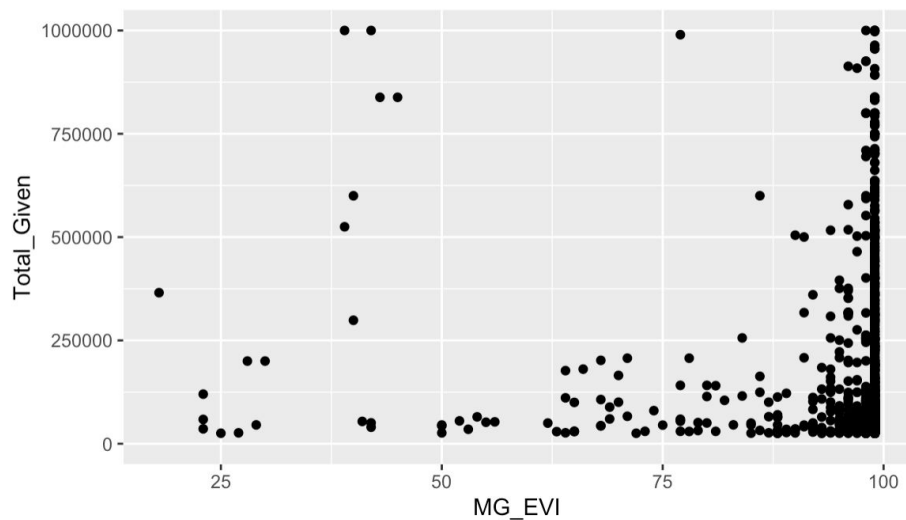


Entities Not Contacted

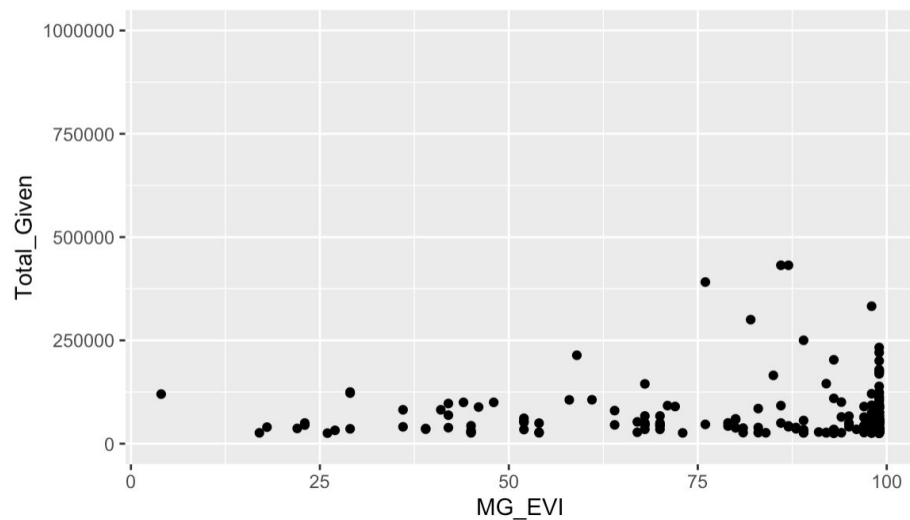


Total Given \geq \$25,000

Entities Contacted



Entities Not Contacted



Total Give Amount per Entity

	Contacted & Gave		Not Contacted & Gave	
MG EVI >= 90	96	Avg: \$136,271 Median: \$4,131 Entities: 8,086	94	Avg: \$6,793 Median: \$810 Entities: 18,162
MG EVI < 90	67	Avg: \$5,408 Median: \$445 Entities: 5,603	51	Avg: \$531 Median: \$100 Entities: 102,321
MG EVI >= 90 Credit Amount >= 25,000	98	Avg: \$716,068 Median: \$82,376 Entities: 1,494	98	Avg: \$424,684 Median: \$40,946 Entities: 213
MG EVI <90 Credit Amount >= 25,000	67	Avg: \$225,064 Median: \$58,820 Entities: 101	60	Avg: \$151,618 Median: \$44,201 Entities: 98

Contact Return Rate

91%

of entities with
MG EVI \geq 90
who were contacted
gave.

56%

of entities with
MG EVI $<$ 90
who were contacted
gave.

Refocus Your Contact

18,860

entities contacted*

gave a total of...

\$1,132,198,116

top ranked MG EVI entities**

gave a total of...

\$1,314,806,881

*with an MG EVI score

**MG EVI ~ 93-99

In Summary

1. **Donations based on Net Worth seem to align with what we expect.**
2. **There are many gaps in the GCR Wealth Engine scores and as a result drawing conclusions is difficult.**
3. **MG EVI is an important metric to use to narrow down the most valuable contacts and can lead to an increase in donations.**

What's next?

Discover what
types of contact
leads to larger
gifts.

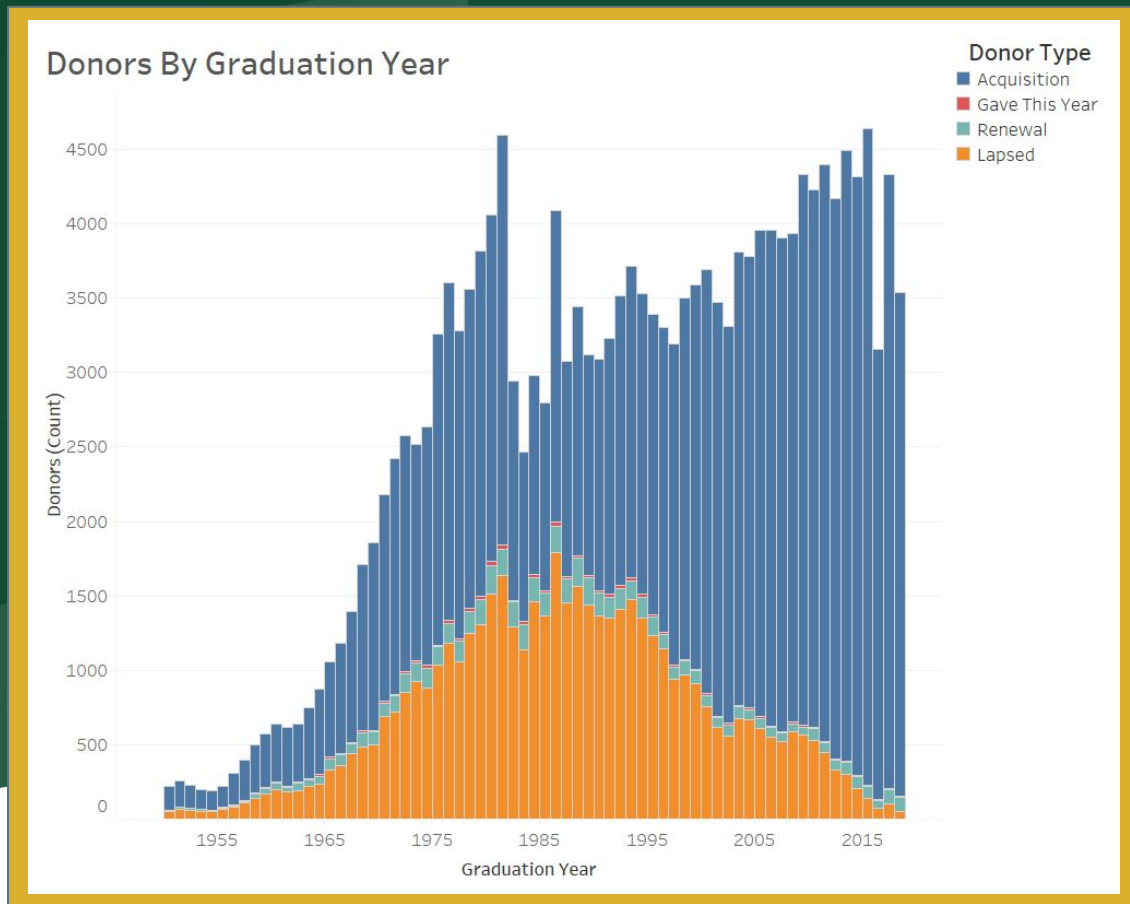
Possibly **Validate**
the current
propensity score
with a score we
create

Questions about
Analysis?

Spring Quarter Goals

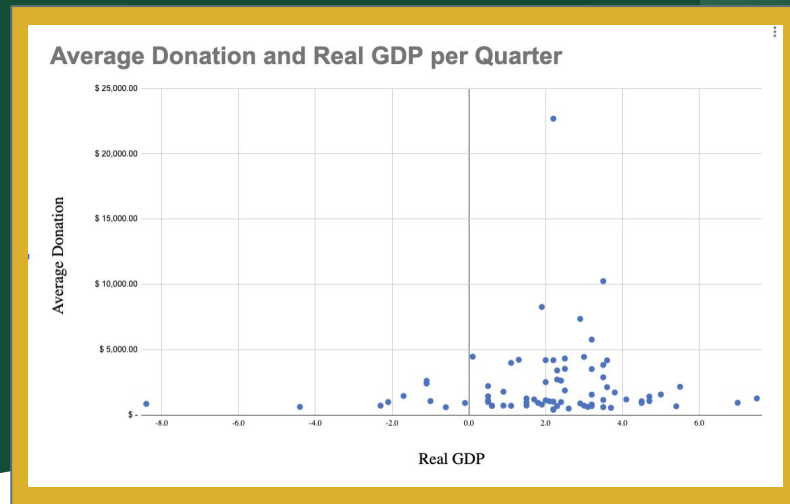
1. Identify trends regarding annual, quarter and GDP
2. Identify trends regarding age, transaction year, and donation.
 - a. Identify the ideal age to contact an alumni
3. Identify trends in transactions before, during, and after the 2008 recession.

Donor Retention



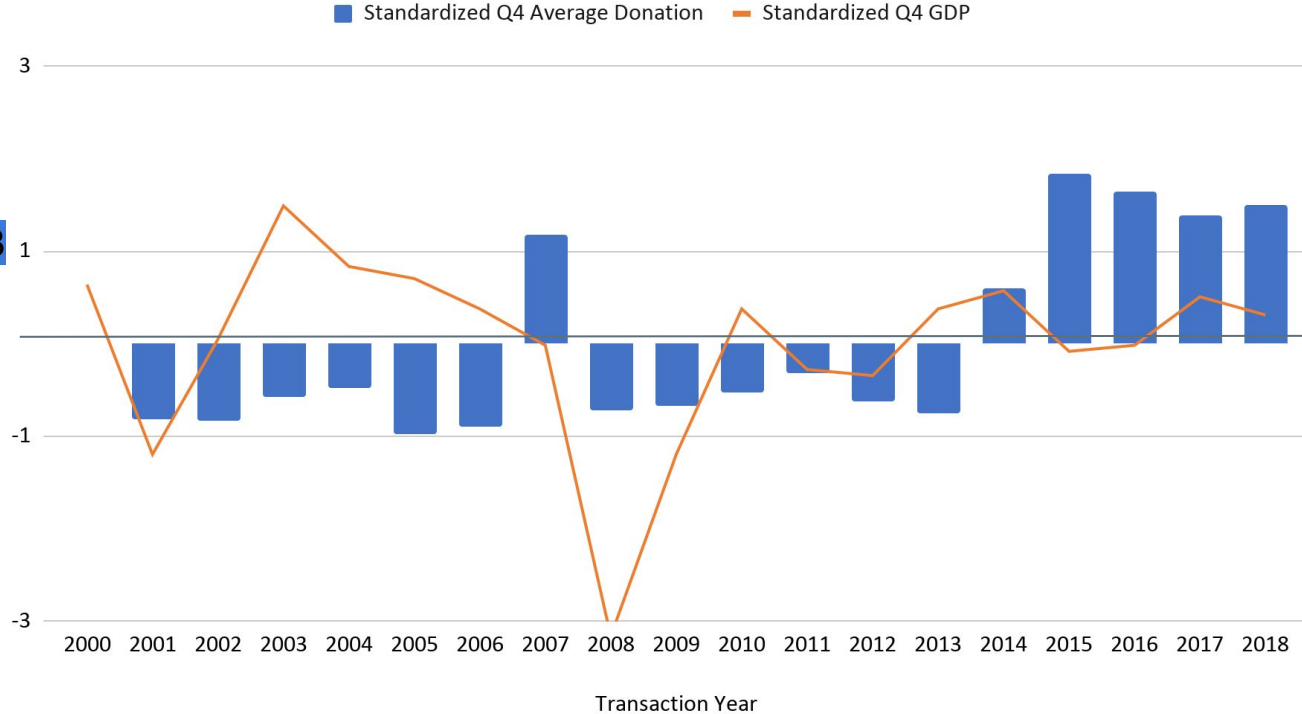
How do donation amounts vary by Quarter?

- Explored several economic measurements to see if a predictive model would be useful.
 - Found no correlation.
- Found that different quarters had similar trends in donations at different amounts.



Q4 Donations vs GPD

Standardized Average Donation and Standardized GDP for Q4 (Stacked)



+1 SD: \$3,278

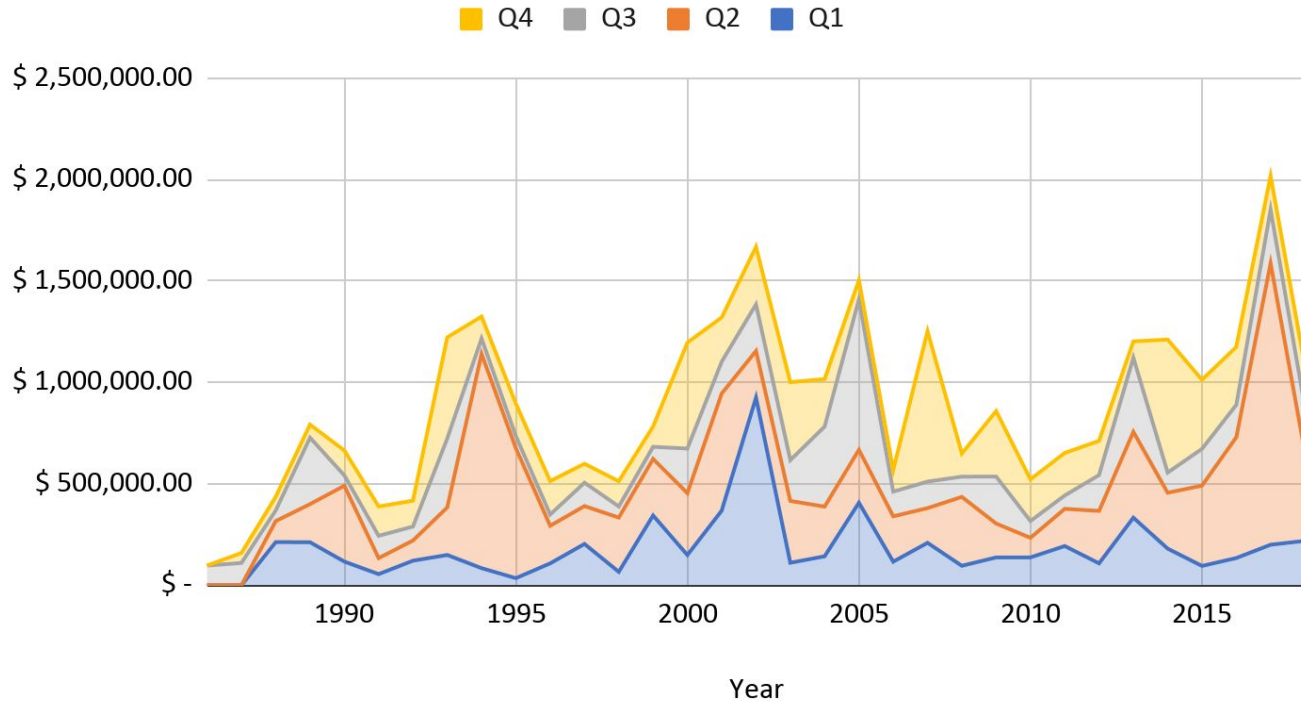
Mean: \$1,865

-1 SD: \$452

*Eliminated outliers

Average Donation by Annual Quarter

Average Donation By Annual Quarter (Stacked)

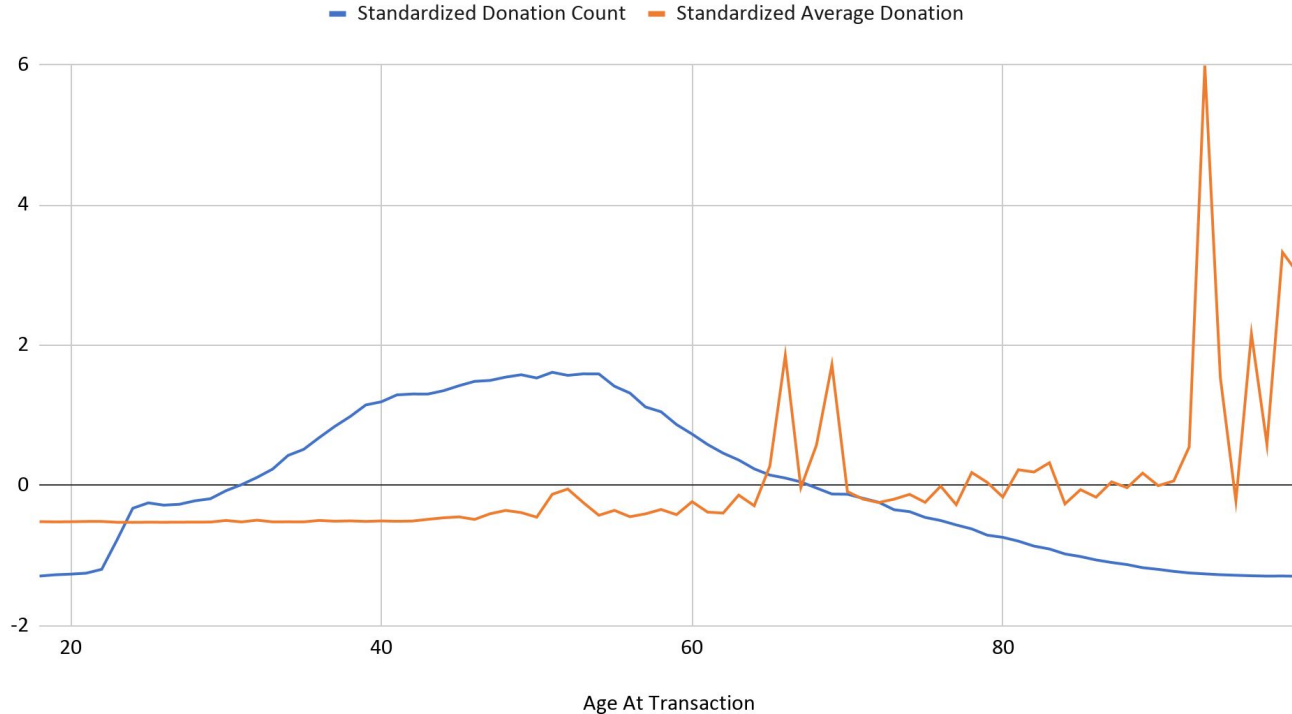


How do donation amounts vary by age?

- Explored donation trends by age
- Found that the best age to contact people is when they're in their 60s.
- Possible factors:
 - Donation of Assets rather than income
 - Retirement
 - Inheritance
 - Estate Donations

All Transactions

Standardized Donation Count and Standardized Average Donation by Age for All Transactions



+2 SD: 13,071

+2 SD: \$27,754

Mean: 5,157

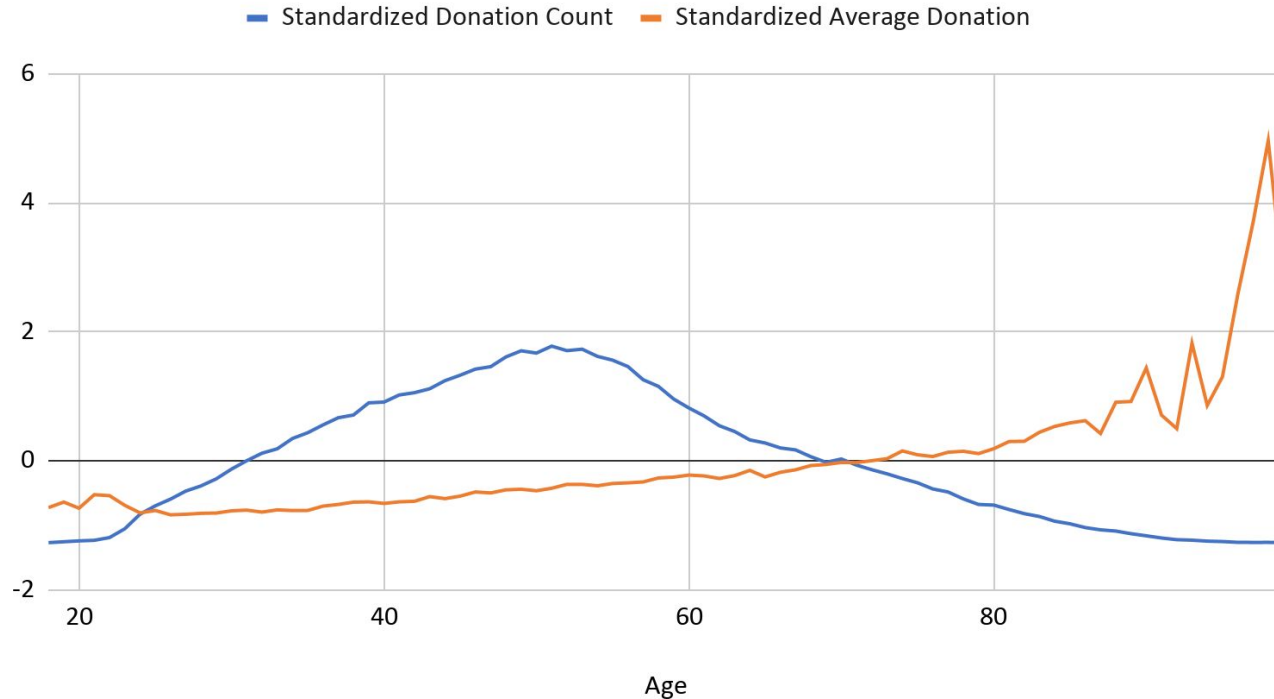
Mean: \$5,834

-2SD: -2,757

-2SD: \$-16,086

Donation \geq \$100 & $<$ \$25,000

Standardized Donation Count and Standardized Average Donation



+2 SD: 8,186

+2 SD: \$2,523

Mean: 3,188

Mean: \$891

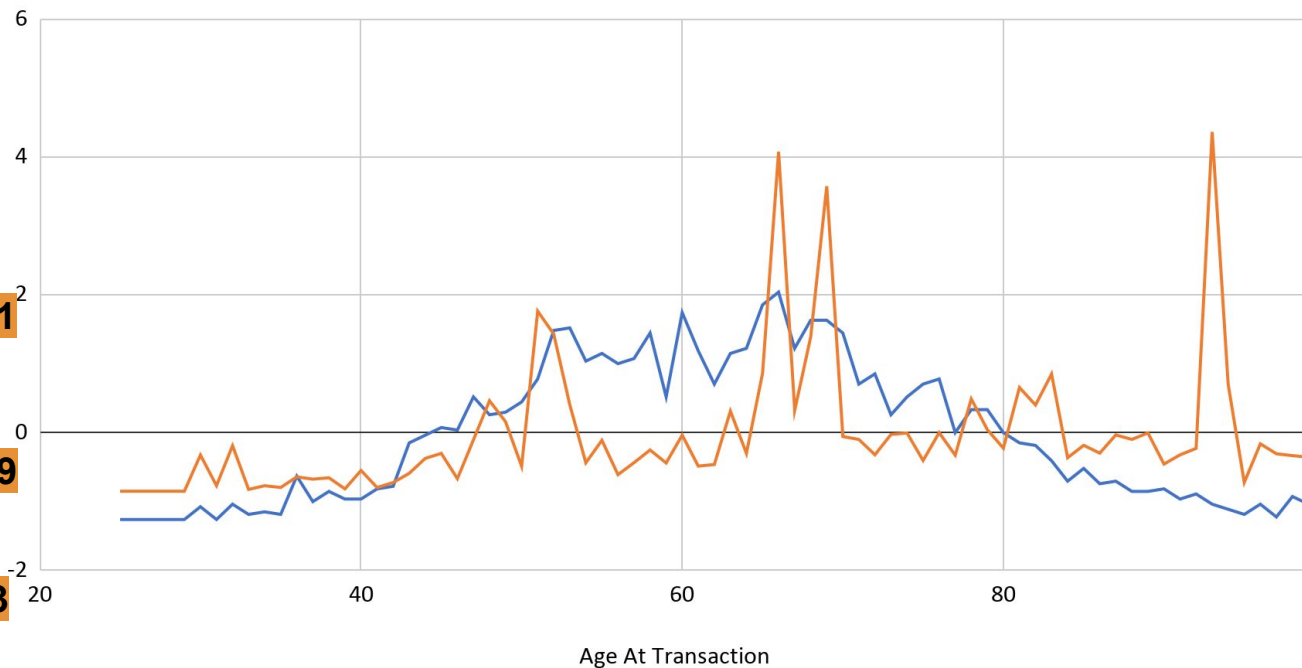
-2SD: -1,810

-2SD: \$-742

Donation \geq \$25,000

Standardized Donation Count and Standardized Donation Average

— Standardized Donation Count — Standardized Average Donation



+2 SD: 89

+2 SD: \$932,821

Mean: 35

Mean: \$295,449

-2SD: -19

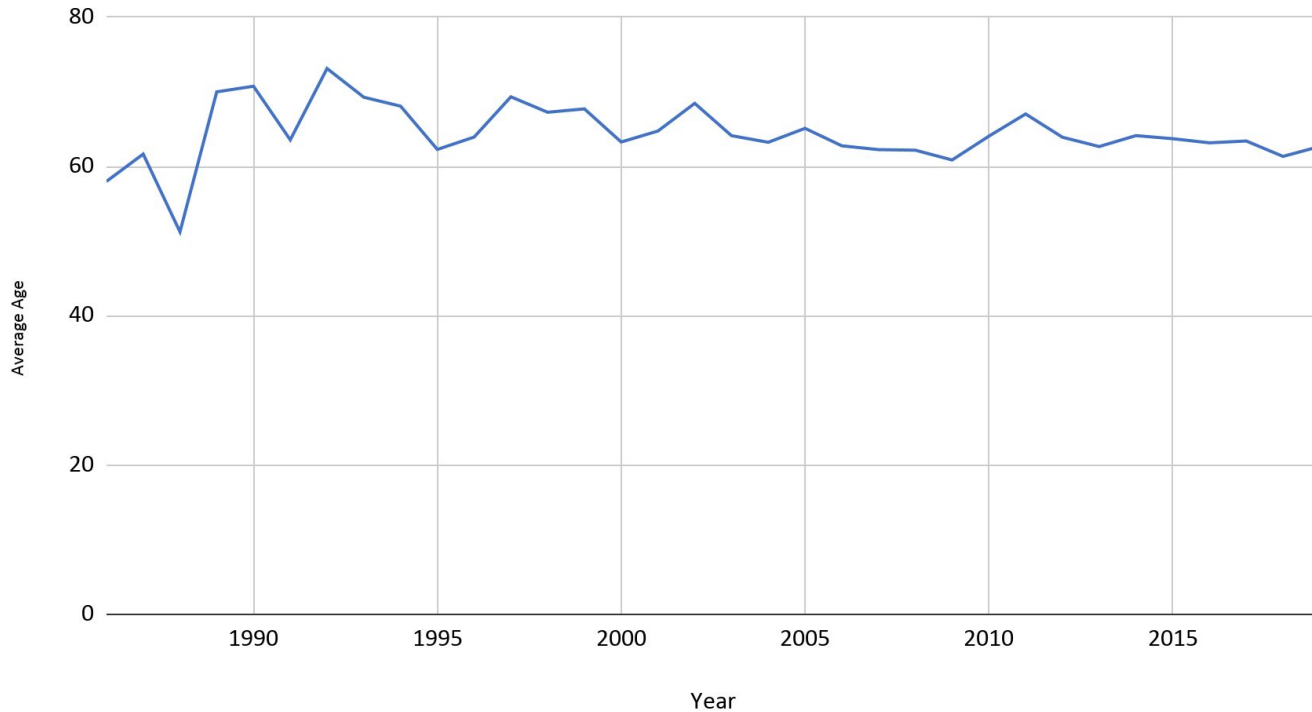
-2SD: \$-341,923

How does age vary by transaction year?

- Hypothesis: Average age of all donors decreases over time.
- Reality: Average age for large donations looks fairly stable over time and average age for all donations has increased by about 15 years.
 - Overall average for large donations is 64 years old.
 - Overall average for all donations is 49 years old.

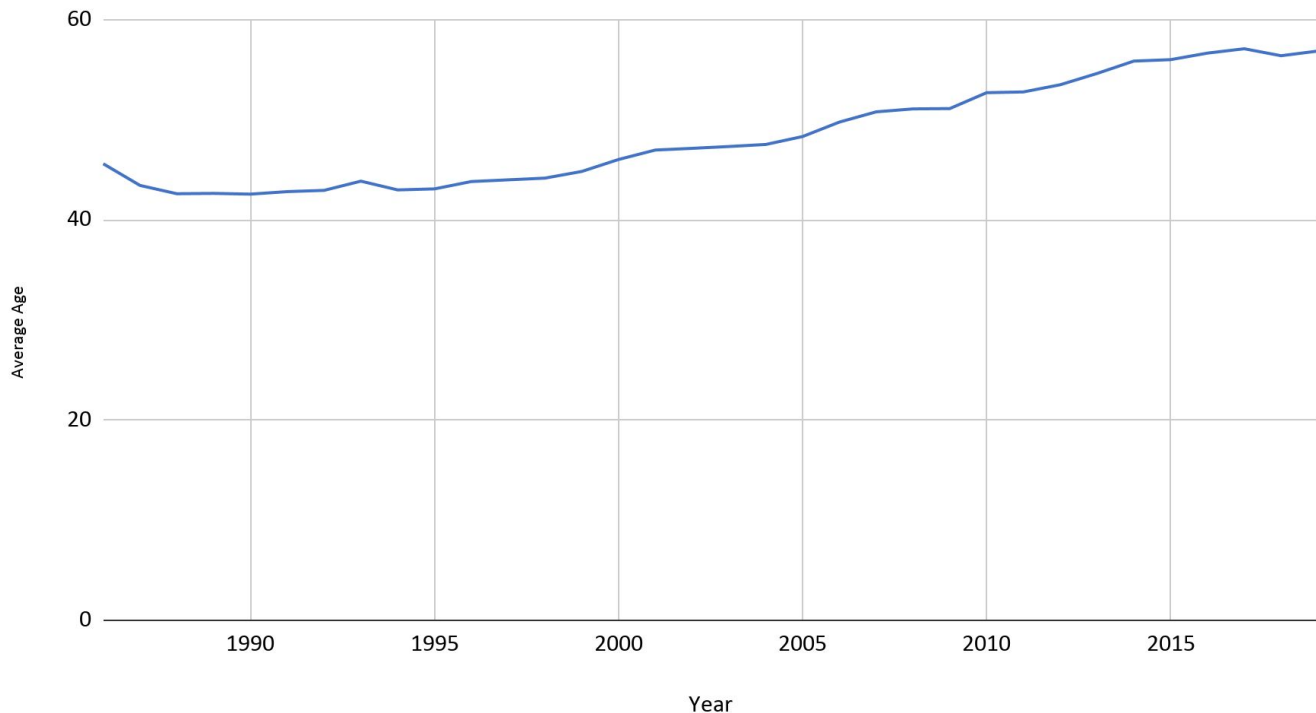
Average Age for Large Donation

Average Age at Transaction Over Time ($\geq \$25,000$)



Average Age at All Transactions

Average Age at Transaction Over Time - All Transactions



Summary

1. **On average, 95% of large donations (>\$25,000) come from individuals between 51 and 77 years old.**
2. **Over the last 30 years, the average large donation is consistently from someone in their early 60s.**
3. **GDP can be a good predictor of expected donations when the economy is not performing well.**

2008 vs COVID-19

Similarities

- High unemployment
- Rapid market decline
- Uncertainty

Differences

- Inherent difference in that 2008 was due to financial system issues
- Different response period

Unemployment

Year	2007	2009	2018	2019	2020 (COVID-19)
Unemployment Rates	5%	10%	4%	3.6%	14.7%

What this means for Cal Poly Giving:

- CP Giving will see a dip in donations for the next few years
- Shorter expected recovery time than 2008
 - ~early 2022

(Britannica, 2009)
(BLS, 2020)

Sources

<https://www.britannica.com/topic/great-recession>

<https://www.bls.gov/news.release/pdf/empisit.pdf>

Thank you!

Any questions?

Contact us at
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