

Ad Hoc Analysis & Reporting Demo



Leveraging Advancement Information for Fundraising

Scope of Demo



Solutions We Offer → Range of Questions → 1 Demo Question

Advancement

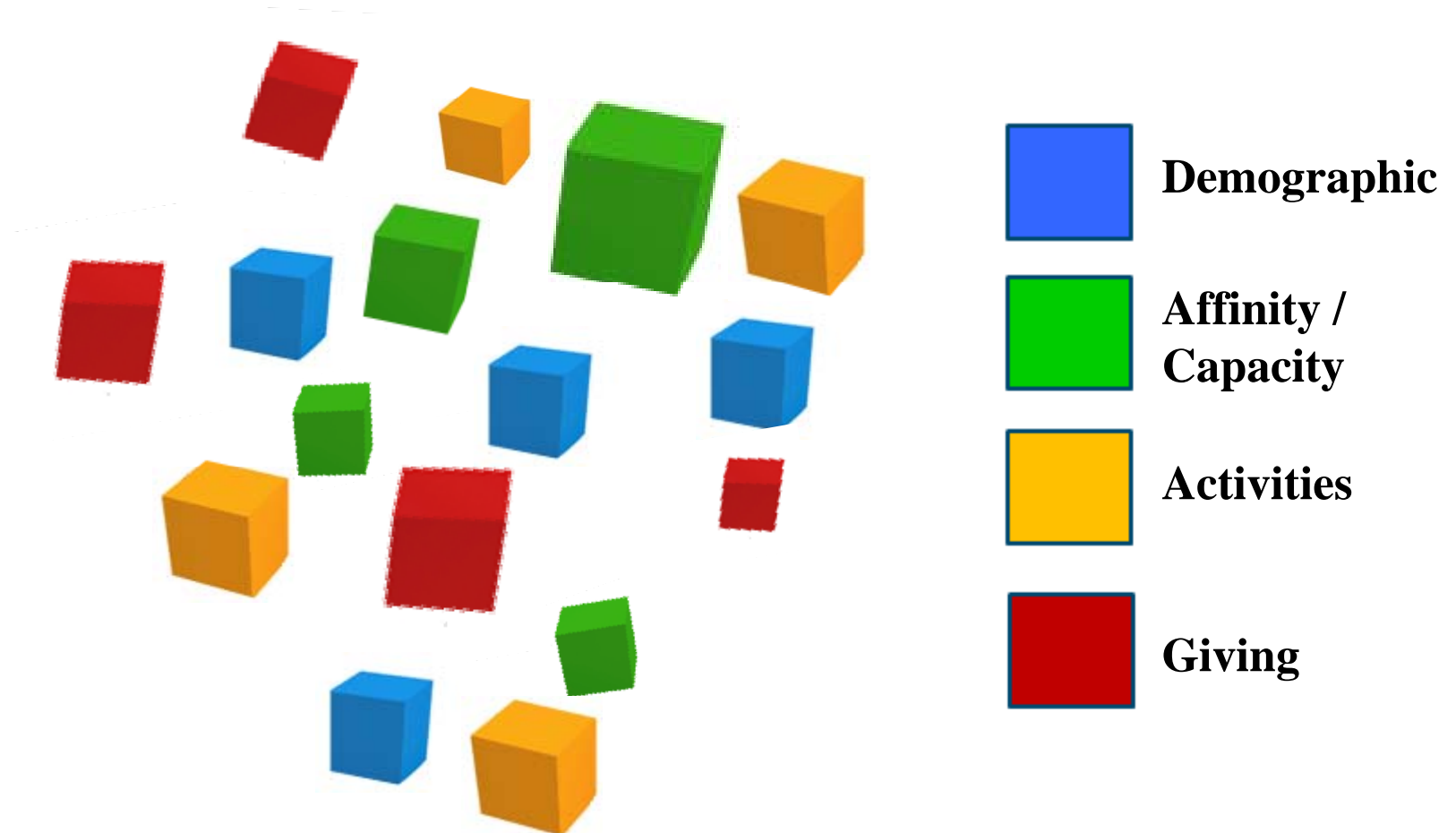
- **General Management**
 - ◀ Staff Performance Mgmt
 - ◀ Campaign Analysis
 - ◀ Ad Hoc Rpt & Analysis
- **Leadership Giving**
 - ◀ Prospect Identification
 - ◀ Prospect Management
- **Annual Giving**
 - ◀ Appeals Targeting
 - ◀ Volunteer Assignments
 - ◀ Call Center Opt
- **Member / Alumni Rltns**
 - ◀ Events, Trips, Clubs

Ad Hoc Analysis & Reporting:

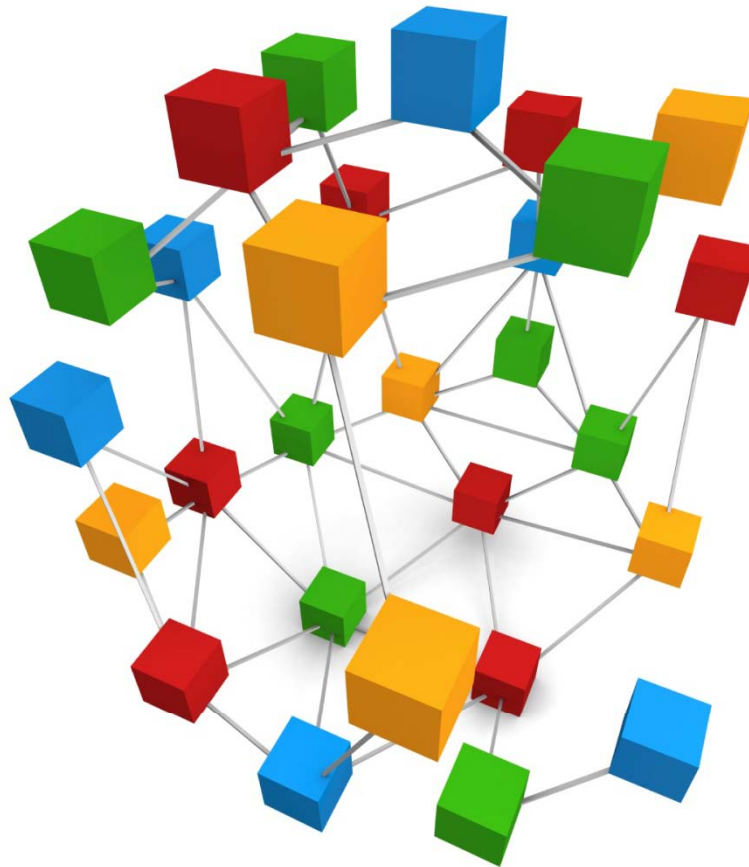
- With 8 weeks left in the year, where do we stand and where should I focus my efforts?
- What percentage of my appeals have brought in over \$20,000? What is the breakdown by constituent group for the money that came in?
- John Smith is going to Austin next week, which candidates should he visit?
- Which events and activities are most effective?
- What are the characteristics of people who have responded with \$500+ gifts to my appeals?
- What are the giving patterns over time:
 - 2 year lapses. What are the drivers?
 - What are the similar factors??
- Etc.

- With 8 weeks left in the year, where do we stand and where should I focus my efforts?

Information Fragmented and Hard To Access . . .



... Advizor Knits It Together



Demographic



**Affinity /
Capacity**



Activities

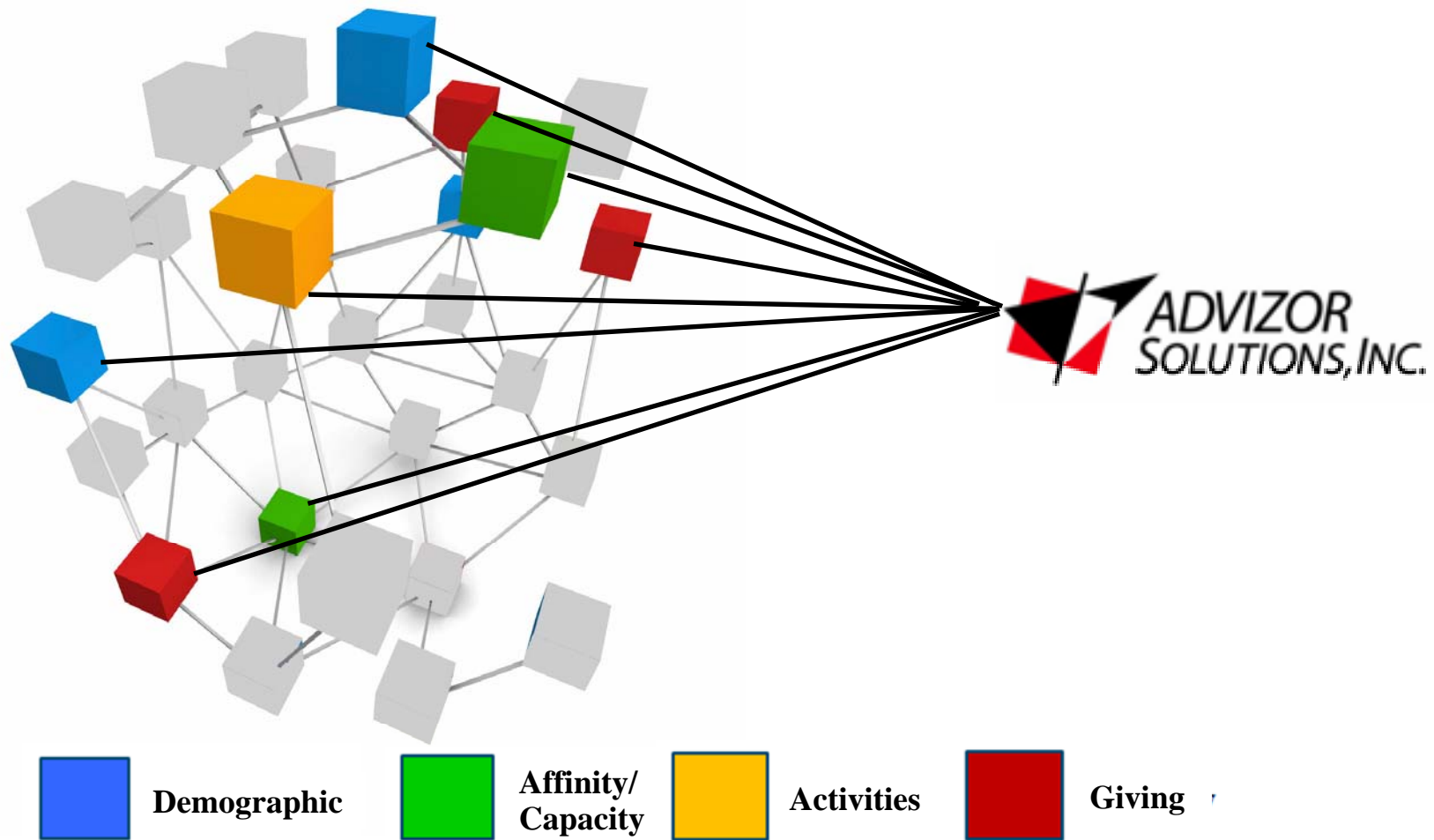


Giving

... Enabling Easy Answers to Key Questions.



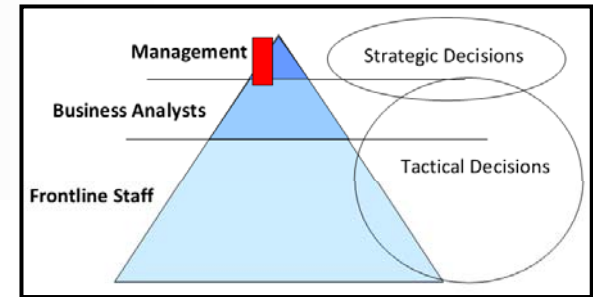
Q: With 8 weeks left in the year, where do we stand and where should I focus my efforts?



Two looks at this:

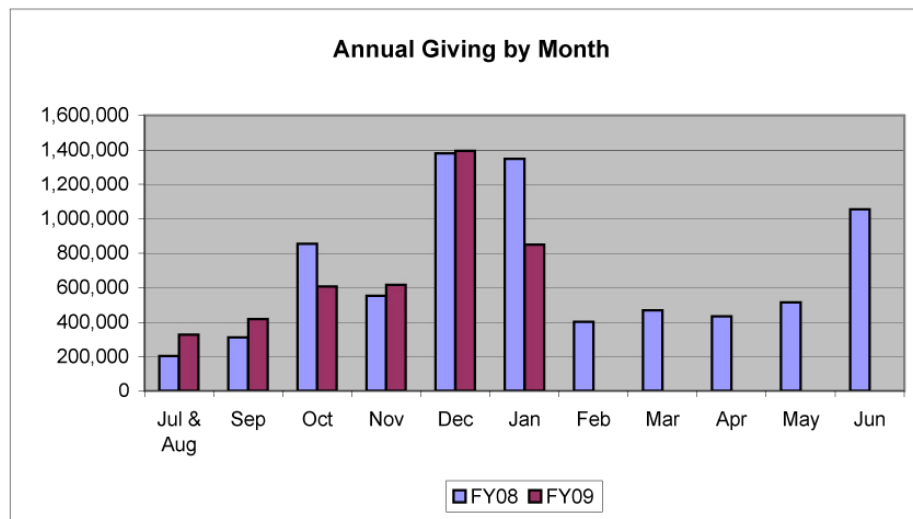
- ▲ **Typical Performance Report**
- ▲ **Visual Discovery™ Dashboard**

Typical Performance Report for Management



Annual Giving Update (as of 1/31/09)

	FY08	FY09	Variance	% Var.	Notes:	Annual Fund		
Overall Annual Giving (\$\$)	\$4,660,355	\$4,220,905	(\$439,450)	-9%	Still running 7.8% ahead of FY07.	Leadership Giving Societies		
Overall Annual Fund Donors	15,224	14,960	(264)	-2%	Includes alumni, parents, friends.	Levels:	FY09 Ytd:	FY08 Total:
Parents Annual Campaign (\$\$)	\$628,185	\$547,988	(\$80,197)	-13%	Parent 2nd Appeal dropped last wk.	\$100,000+	1	4
Parents Annual Campaign Donors	1,800	2,405	605	34%		\$50,000	1	8
AFLGS (\$\$)	\$3,081,953	\$2,591,014	(\$490,939)	-16%	More than \$700K unrenewed from	\$25,000	11	19
AFLGS Members	1,124	999	(125)	-11%	\$10K+ donors who gave by 1/31/08.	\$10,000	56	90
Class Gift Campaign (\$\$)	\$4,798	\$2,299	(\$2,499)	-52%	First e-solicitation went out last wk.	\$5,000	77	128
Class Gift Campaign Donors	58	44	(14)	-24%		\$2,500	115	190
Online Giving (\$\$)	\$348,857	\$347,192	(\$1,665)	0%	Avg. Gift Size is lower this year, but	\$1,000	624	1057
Online Donors	1,002	1,319	317	32%	online giving still remains strong.			



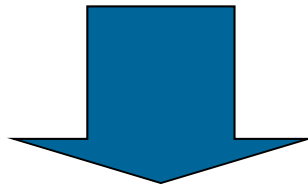
Top FY09 Annual Fund Donors:	FY09 AF	Gift Date	FY08 AF
Mr. Rhett Terrier	100,000	12/22/08	100,000
Mrs. Janet Culver	50,000	11/26/08	30,000
Ms. Susan Martin	40,000	11/25/08	0
Mr. John Doe	35,000	10/7/08	15,250
Mr. Steven Richards	35,000	11/5/08	30,000
Mr. Matthew Heck	30,177	12/24/08	2,500
Mr. Jason Mayer	30,000	10/19/08	10,000
Mrs. Jill Baum	29,994	1/6/09	500
Ms. Carolyn Hill	25,000	1/2/09	15,000
Mr. Jack Nichols III	25,000	12/12/08	50,000
Mrs. Martha Gerbert	25,000	10/23/08	10000
Mr. Santiago Gomez	25,000	1/14/09	0
Mrs. Yvonne Chen	25,000	7/8/08	0

*The above are all of the \$25K+ annual fund donors to date.

Performance Report Shortcomings



- ▲ “Snapshot” for Management
- ▲ Highlight What’s on Track, What’s Not



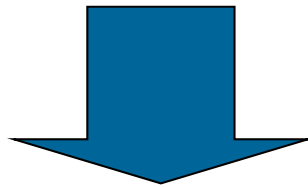
- ▲ **BUT: Doesn’t Answer “Why”;
Doesn’t Provide Detail For Action**

Another Way . . .

Visual Discovery Dashboard:



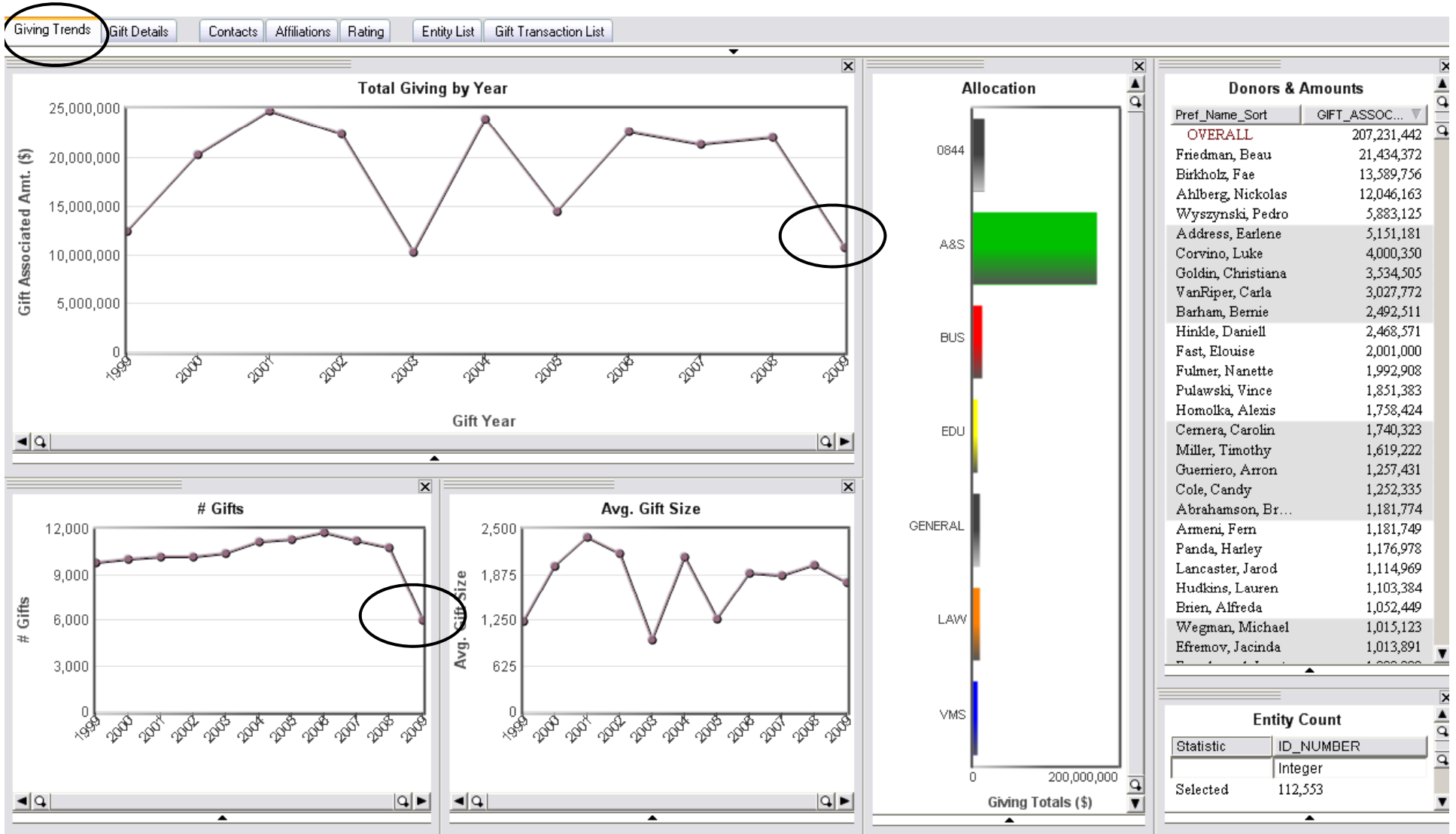
- ▲ **Interactive Data Discovery & Analysis**
- ▲ **Quickly Uncover What Matters**
- ▲ **Drill In On Operational Metrics & Details**



- ▲ **Get Details and Take Action**

Lets take a look . . .

Giving Trends → Shortfall in 2008 YTD with 8 weeks to go. Key issue is gifts are not coming in, NOT gift size.

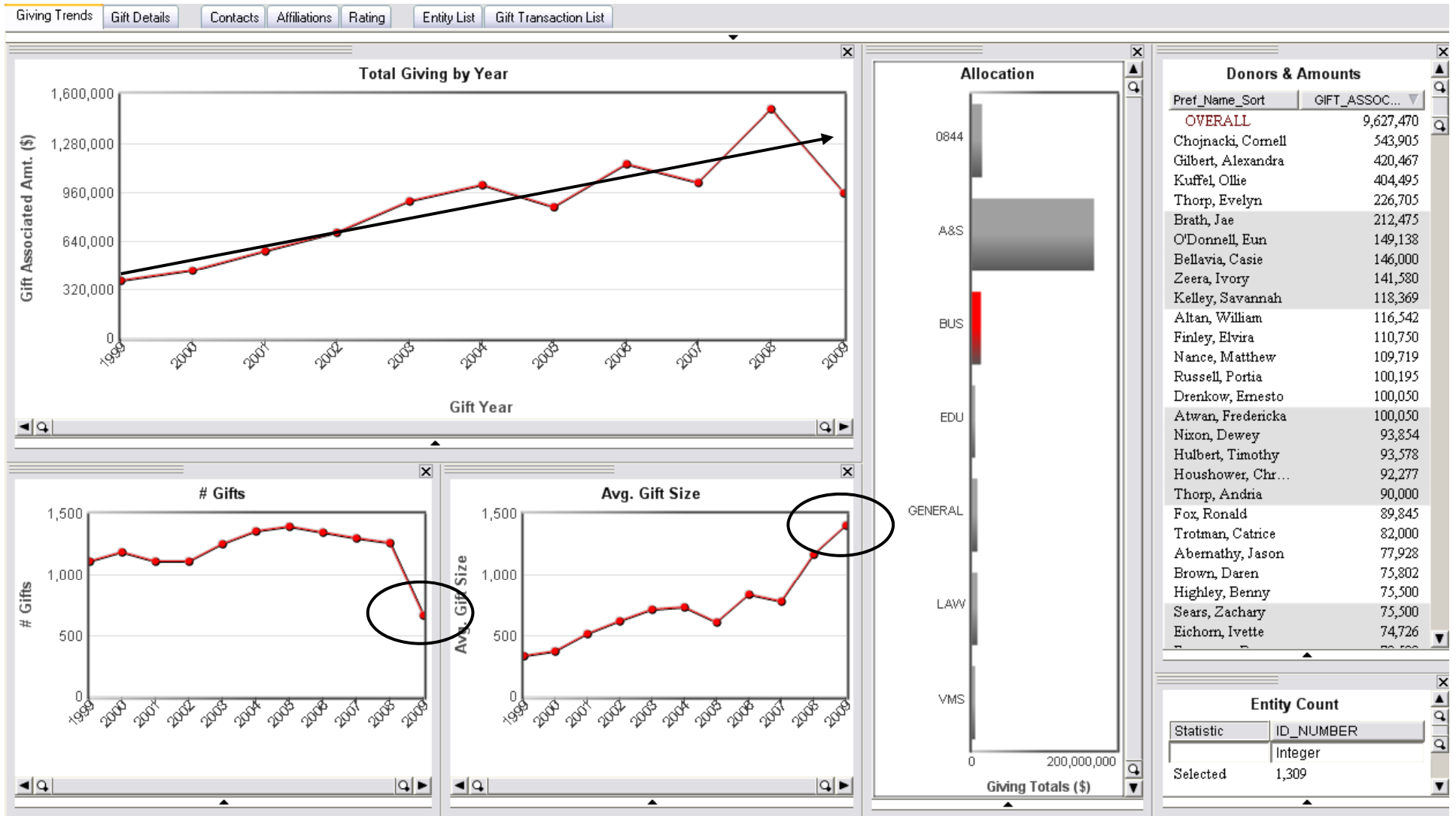


***First, let's drill in and see
if this trend is consistent
by school.***

Click → A&S dominates, but is off substantially . . .



**Click → Business School doing much better . . .
has offset less gifts with bigger gifts.**



Click → Focus on A&S . . . 6,619 total donors . . .



Giving Trends | Gift Details | Contacts | Affiliations | Rating | Entity List | Gift Transaction List

Total Giving by Year

Year	Gift Associated Amount (\$)
1998	10,000,000
1999	18,000,000
2000	23,000,000
2001	20,000,000
2002	8,000,000
2003	10,000,000
2004	12,000,000
2005	19,000,000
2006	16,000,000
2007	19,000,000
2008	8,000,000

Allocation

A&S

Donors & Amounts

Prer_Name_Sort	GIFT_ASSOC...
OVERALL	168,089,975
Friedman, Beau	21,434,372
Birkholz, Fae	13,589,756
Wyszynski, Pedro	5,883,125
Address, Earlene	5,151,181
Corvino, Luke	4,000,350
Goldin, Christiana	3,534,505
VanRiper, Carla	3,027,772
Hinkle, Daniell	2,468,571
Fast, Elouise	2,001,000
Fulmer, Nanette	1,992,908
Homolka, Alexis	1,758,424
Guerriero, Arron	1,257,431
Cole, Candy	1,252,335
Abrahamson, Br...	1,181,774
Armeni, Fern	1,181,749
Panda, Harley	1,176,978
Lancaster, Jarod	1,114,969
Hudkins, Lauren	1,103,384
Brien, Alfreda	1,052,449
Wegman, Michael	1,015,123
Efremov, Jacinda	1,013,891
Frandegard, Janet	1,003,000
Brewton, Domi...	891,558
Stepleton, Leonard	855,440
DiNicola, Dino	850,000
Birkholz, Edwardo	827,687

Gifts

Year	# Gifts
1998	7,500
1999	7,500
2000	7,500
2001	7,500
2002	7,500
2003	8,000
2004	8,500
2005	9,000
2006	8,500
2007	8,000
2008	4,500

Avg. Gift Size

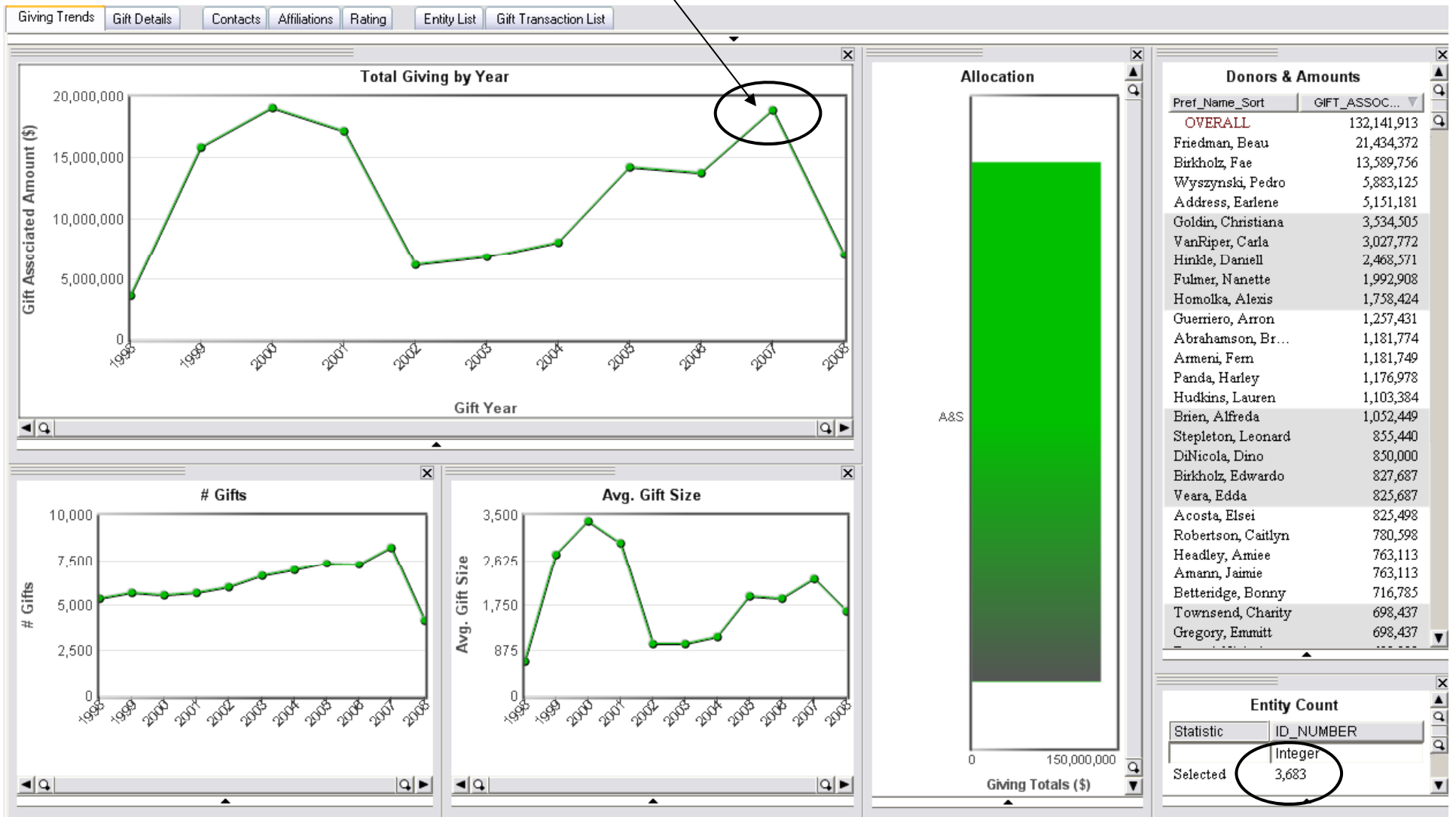
Year	Avg. Gift Size
1998	1,500
1999	2,500
2000	2,800
2001	2,500
2002	1,000
2003	1,200
2004	1,500
2005	2,000
2006	1,800
2007	2,200
2008	1,800

Entity Count

Statistic	ID_NUMBER
Selected	6,619

***Second, check out people
who gave last year, but
not yet this year.***

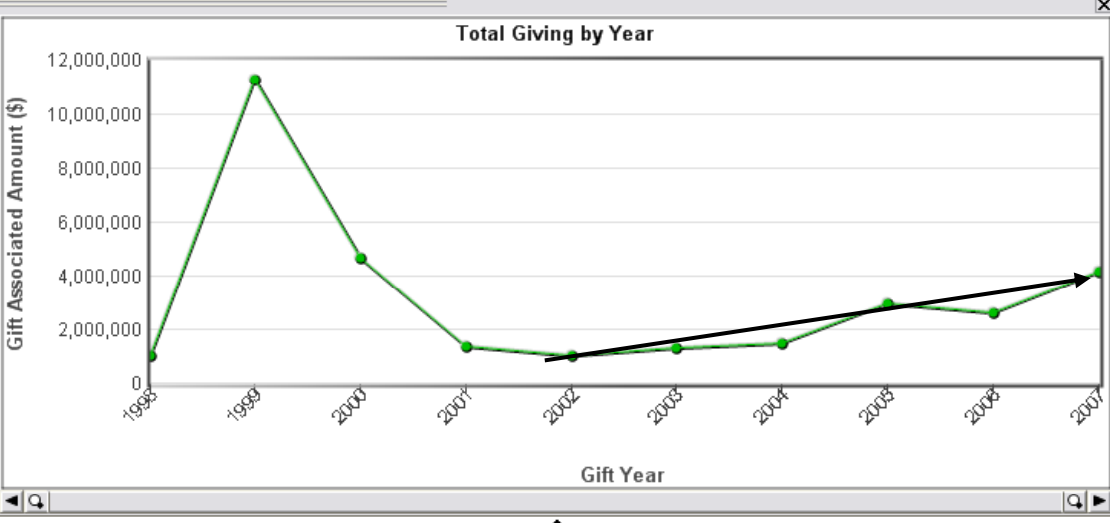
Click → 3,683 gave in 2007 (last year)
 (click on line chart to select)



Click → 1,535 have not given this year (2008)
 (click 2008 on the line chart to select and remove donors who DID give in 2008)

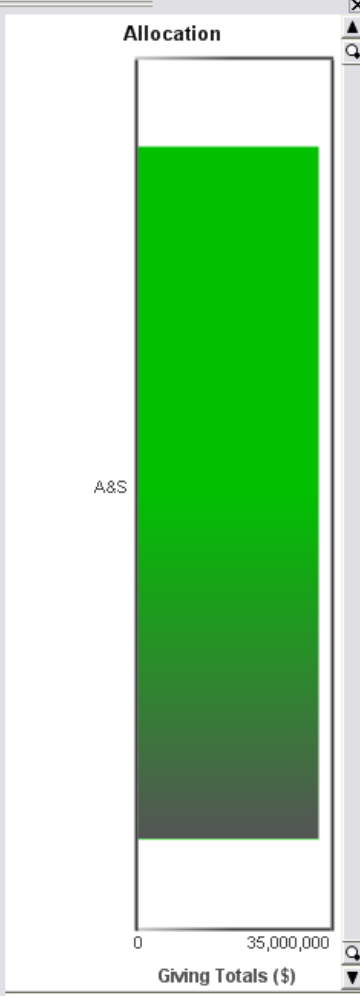
Giving Trends | Gift Details | Contacts | Affiliations | Rating | Entity List | Gift Transaction List

Total Giving by Year



Year	Gift Associated Amount (\$)
1998	~1,000,000
1999	~11,000,000
2000	~4,500,000
2001	~1,500,000
2002	~1,200,000
2003	~1,500,000
2004	~1,800,000
2005	~2,800,000
2006	~2,500,000
2007	~4,000,000
2008	~4,000,000

Allocation

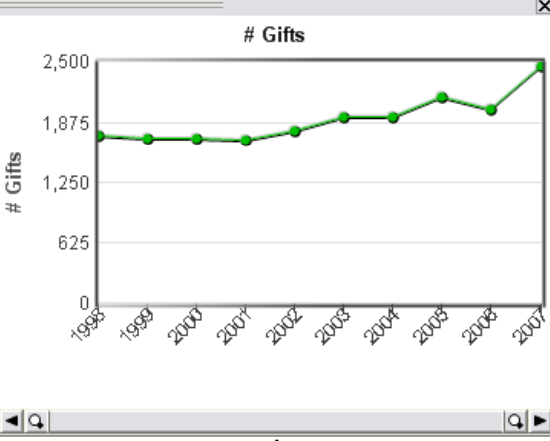


A&S

Donors & Amounts


Pref_Name_Sort	GIFT_ASSOC...
OVERALL	32,757,980
Birkholz, Fae	13,589,756
Brien, Alfreda	1,052,449
DiNicola, Dino	850,000
Betteridge, Bonny	716,785
Jenson, Carley	578,002
Moniodis, Elden	532,800
Blaising, Dulce	341,830
Cooper, Robert	329,738
Duff, Ezra	314,571
Peterson, Enrique	277,643
Nance, Albert	275,642
Bitler, Beata	275,642
Weldetensay, A...	273,886
Lemos, Laura	259,708
Rossignol, Britt...	232,091
Batera, Cherri	232,091
Shepherd, Alex	210,775
Hernandez, Cha...	208,525
Francis, Earnest	182,500
Rumery, Fred	179,741
Shrivastava, Tracey	168,500
Molloy, Aretha	159,340
Maddox, Ali	152,698
Ortolani, Ronald	152,068
Magallanes, Billi	147,025
Miles, Darren	132,931

Gifts



Year	# Gifts
1998	~1,750
1999	~1,700
2000	~1,700
2001	~1,700
2002	~1,750
2003	~1,850
2004	~1,850
2005	~2,000
2006	~1,900
2007	~2,400
2008	~2,400

Avg. Gift Size



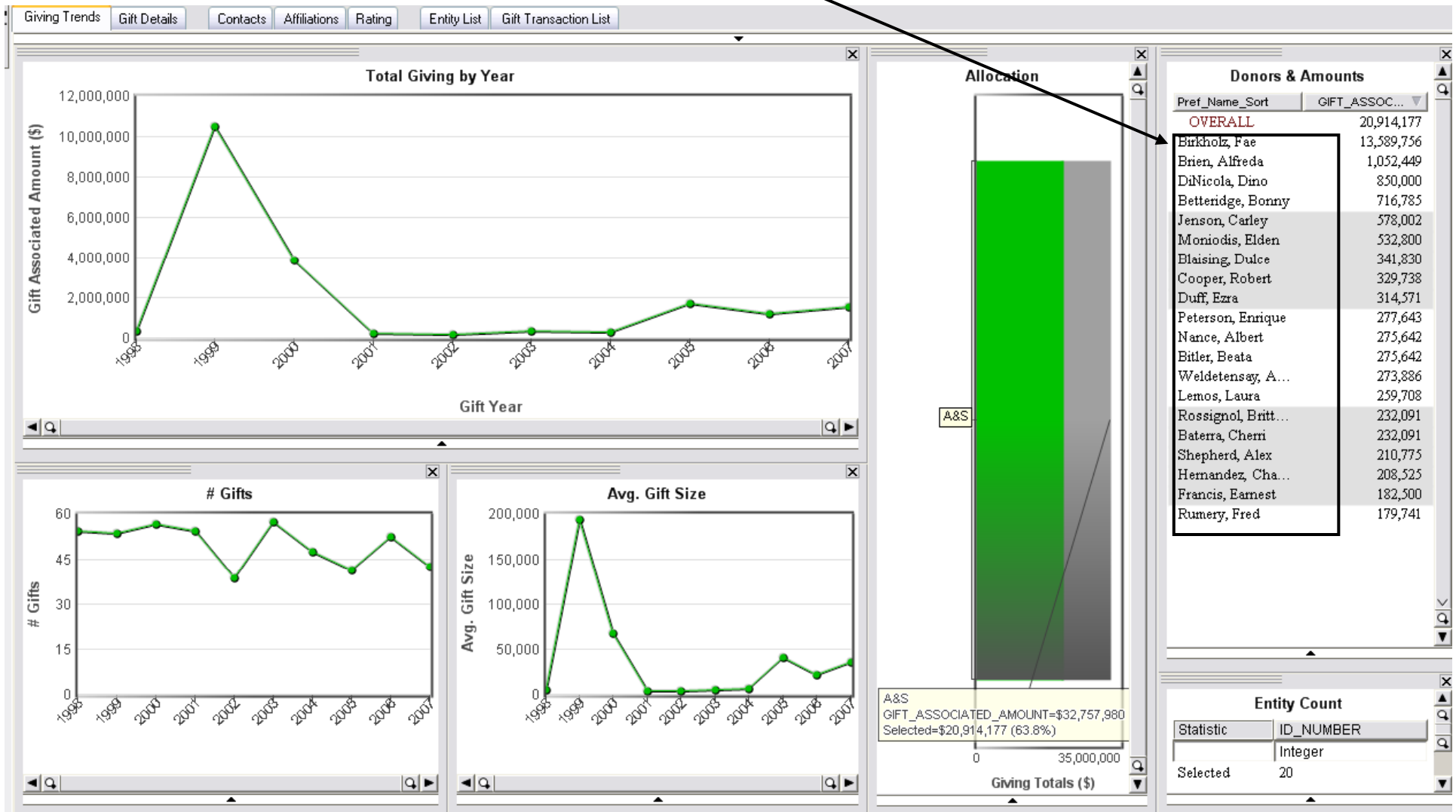
Year	Avg. Gift Size
1998	~1,000
1999	~6,500
2000	~2,500
2001	~1,000
2002	~800
2003	~800
2004	~800
2005	~1,200
2006	~1,200
2007	~1,500
2008	~1,500

Entity Count

Statistic	ID_NUMBER
Selected	Integer 1,535

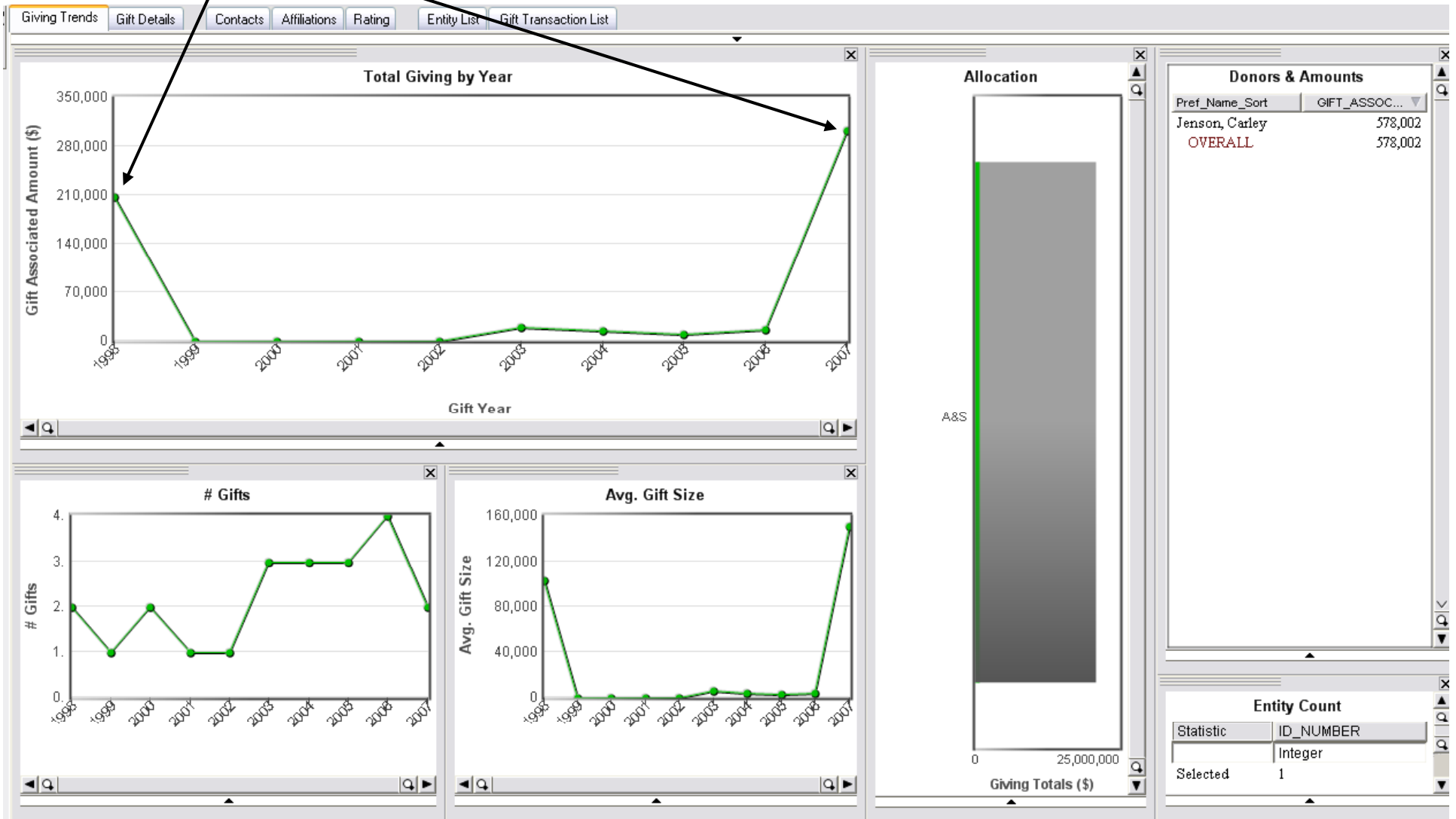
***Now, let's just look at the
"Top 20".***

Click to select "Top 20". They make up \$21mm = 64% of all donations for this group of 1,535 . . . let's focus on just them.

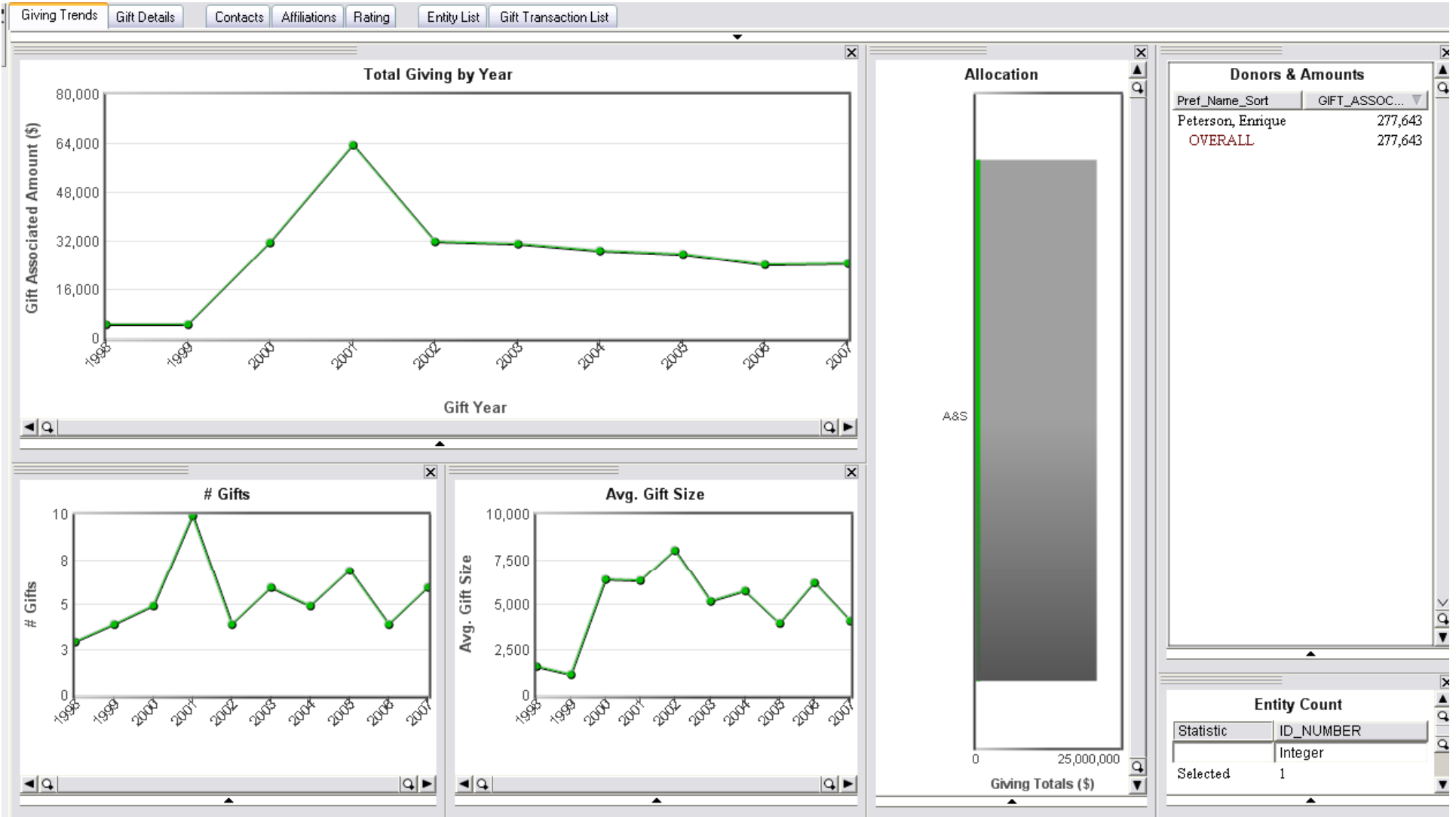


***This is a key group. Let's
drill in on a few individuals
and develop strategies.***

Click on Carley Jensen (#5 on list) // Gives at reunions // Approach for \$25k off year gift.



Click on Enrique Peterson (#10 on list) // Consistent giving pattern until this year (2008); (2008 excluded from graph) ■ ■ ■



... Click on Gift Transaction page. Enrique usually gives in June – drive now to close.

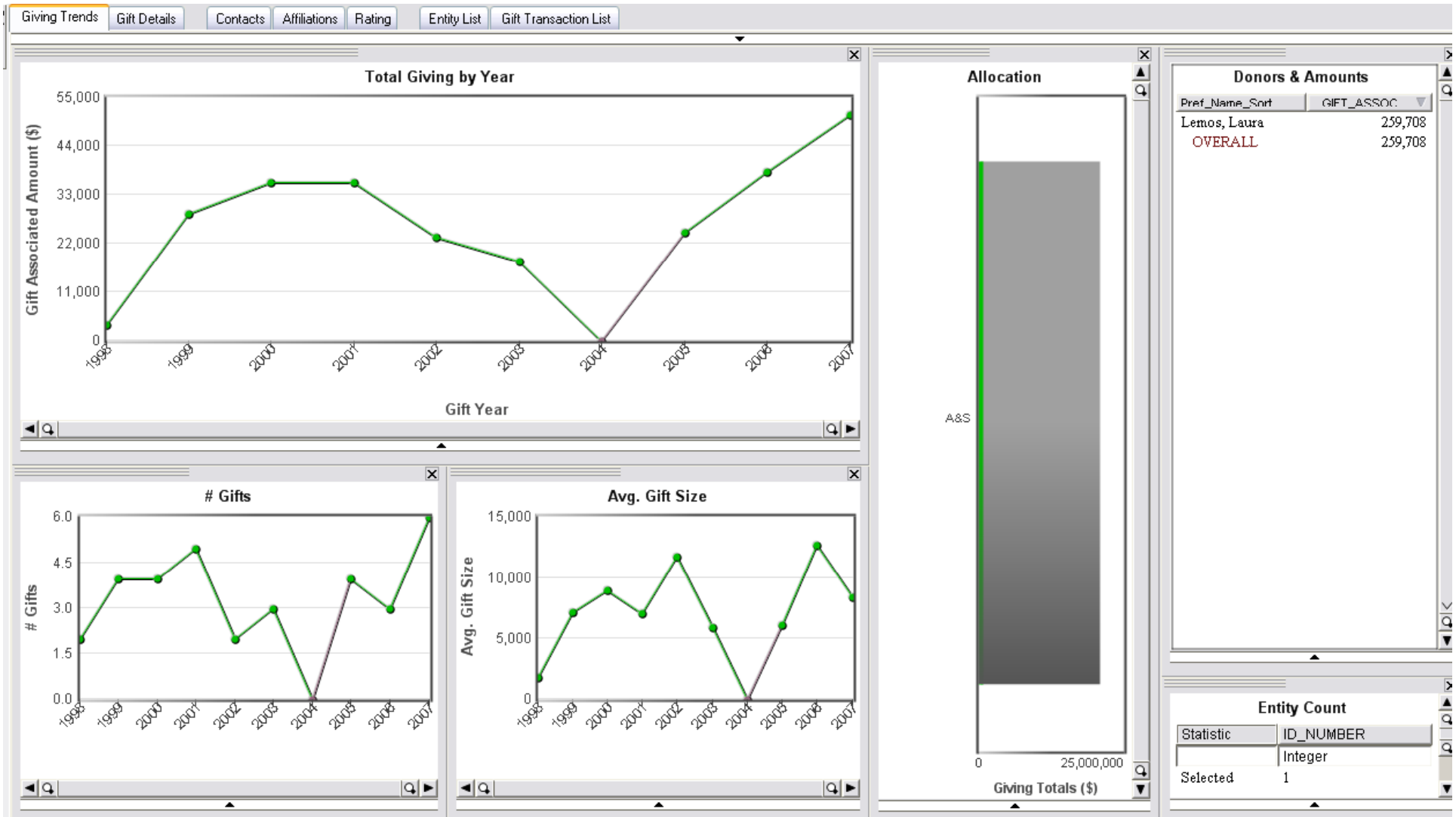


Giving Trends | Gift Details | Contacts | Affiliations | Rating | Entity List | **Gift Transaction List**

Gift Transaction List

GIFT_DONOR_ID	Pref_Name_Sort ▲	GIFT_YEAR_...	GIFT_DATE_... ▲	GIFT_ASSOCIATED_AMOUNT	Allocation	PAYMENT_TYPE	TRANSACTION_TYPE
19136	Peterson, Enrique	2001	6/29/2001	\$114	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2001	6/29/2001	\$114	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2002	12/31/2001	\$12,500	A&S	Securities	Pledge Payment
19136	Peterson, Enrique	2002	12/31/2001	\$12,500	A&S	Securities	Pledge Payment
19136	Peterson, Enrique	2002	12/31/2001	\$2,400	A&S	Cash	Gift
19136	Peterson, Enrique	2002	6/14/2002	\$5,000	A&S	Cash	Gift
19136	Peterson, Enrique	2003	9/25/2002	\$500	A&S	Cash	Gift
19136	Peterson, Enrique	2003	4/8/2003	\$12,500	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2003	4/8/2003	\$12,500	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2003	4/8/2003	\$5,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2003	4/8/2003	\$1,000	A&S	Cash	Gift
19136	Peterson, Enrique	2003	4/8/2003	\$100	A&S	Cash	Gift
19136	Peterson, Enrique	2004	12/31/2003	\$3,271	A&S	Cash	Gift
19136	Peterson, Enrique	2004	4/14/2004	\$5,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2004	6/30/2004	\$1,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2004	6/30/2004	\$10,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2004	6/30/2004	\$10,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2005	12/31/2004	\$1,000	A&S	Cash	Gift
19136	Peterson, Enrique	2005	5/10/2005	\$100	A&S	Cash	Gift
19136	Peterson, Enrique	2005	6/29/2005	\$5,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2005	6/29/2005	\$10,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2005	6/29/2005	\$10,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2005	6/29/2005	\$1,000	A&S	Cash	Gift
19136	Peterson, Enrique	2005	6/30/2005	\$1,000	A&S	Cash	Gift
19136	Peterson, Enrique	2006	6/29/2006	\$10,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2006	6/29/2006	\$5,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2006	6/29/2006	\$10,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2006	6/30/2006	\$5	A&S	Cash	Gift
19136	Peterson, Enrique	2007	11/29/2006	\$25	A&S	Cash	Gift
19136	Peterson, Enrique	2007	2/23/2007	\$0	A&S	Cash	Gift
19136	Peterson, Enrique	2007	6/30/2007	\$5,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2007	6/30/2007	\$3,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2007	6/30/2007	\$3,000	A&S	Cash	Pledge Payment
19136	Peterson, Enrique	2007	6/30/2007	\$14,000	A&S	Cash	Gift

Click on Laura Lemos (#15 on list) // Solid giving increases last 3 years . . .



**... Laura usually gives major gift in December –
Get gift officer with her ASAP to solicit larger
June gift this year.**



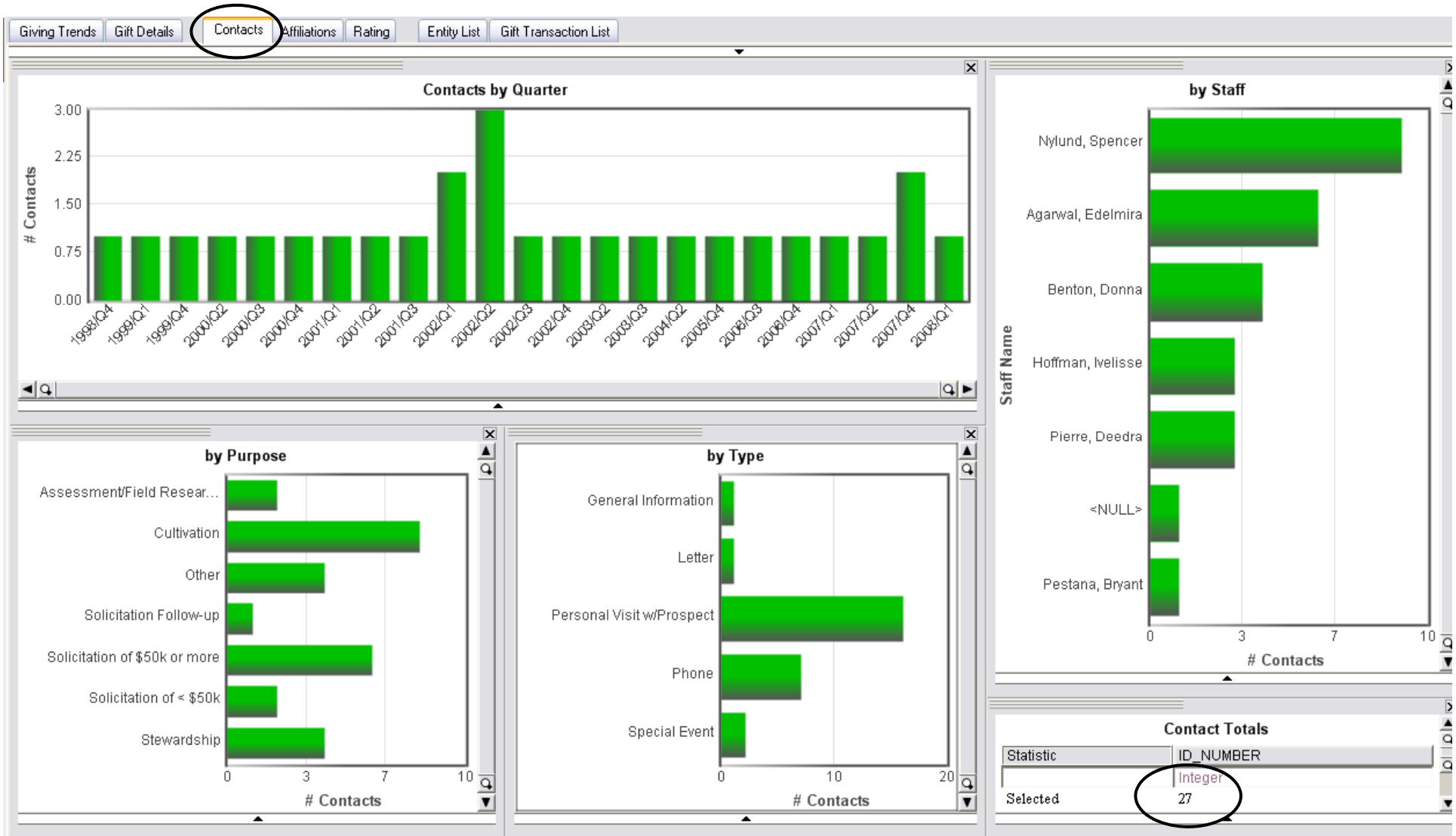
Giving Trends | Gift Details | Contacts | Affiliations | Rating | Entity List | **Gift Transaction List**

Gift Transaction List

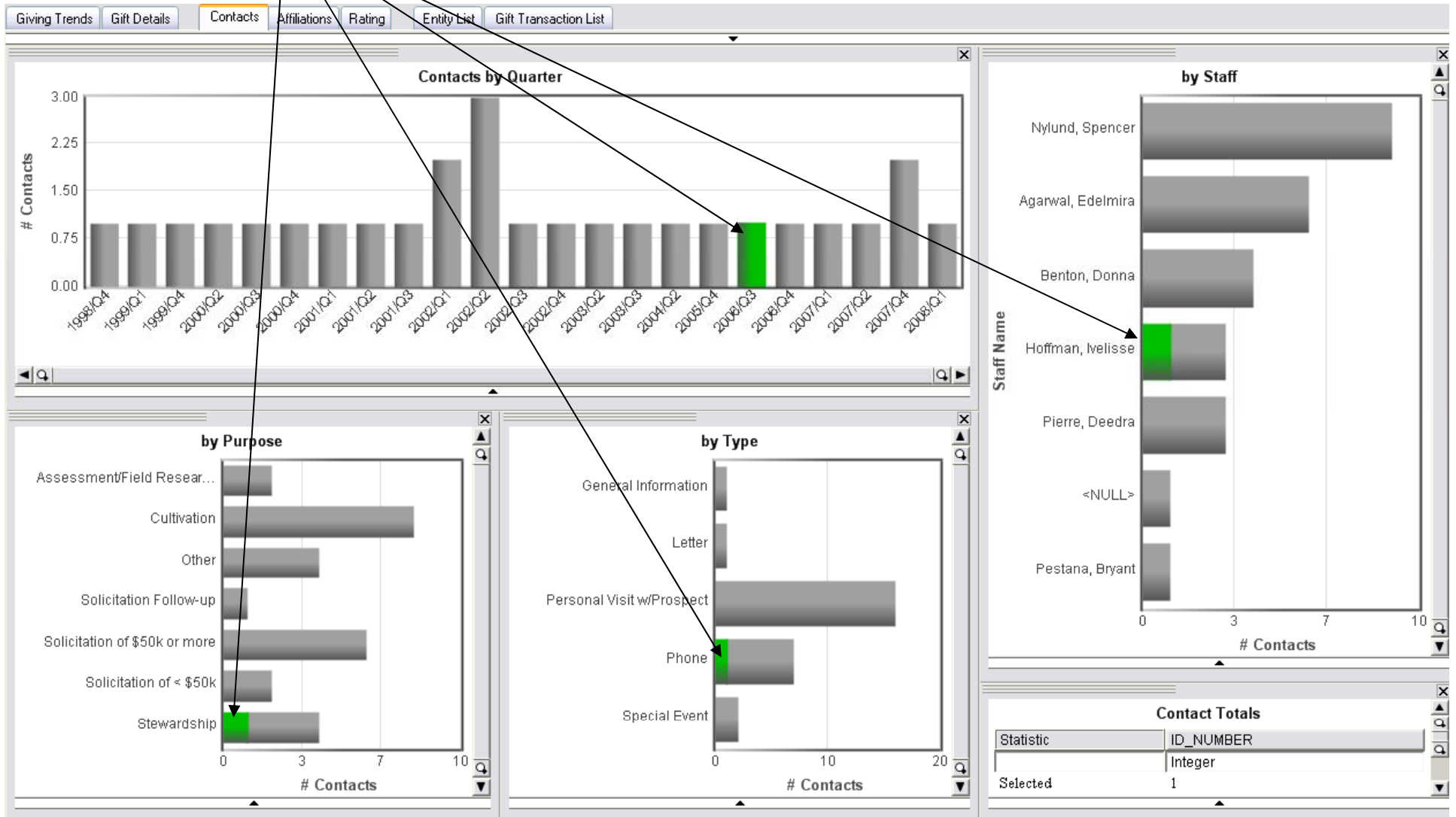
GIFT_DONOR_ID	Pref_Name_Sort ▲	GIFT_YEAR...	GIFT_DATE... ▲	GIFT_ASSOCIATED_AMOUNT	Allocation	PAYMENT_TYPE	TRANSACTION_TYPE
48404	Lemos, Laura	2005	8/4/2004	\$3,500	A&S	Cash	Gift
48404	Lemos, Laura	2005	12/23/2004	\$20,246	A&S	Securities	Gift
48404	Lemos, Laura	2005	12/31/2004	\$14	A&S	Securities	Gift
48404	Lemos, Laura	2005	6/3/2005	\$750	A&S	Cash	Gift
48404	Lemos, Laura	2006	12/30/2005	\$30,775	A&S	Securities	Gift
48404	Lemos, Laura	2006	6/28/2006	\$5,000	A&S	Cash	Pledge Payment
48404	Lemos, Laura	2006	6/28/2006	\$2,500	A&S	Cash	Gift
48404	Lemos, Laura	2007	10/2/2006	\$1,000	A&S	Cash	Gift
48404	Lemos, Laura	2007	12/20/2006	\$41,325	A&S	Securities	Gift
48404	Lemos, Laura	2007	6/8/2007	\$2,500	A&S	Cash	Gift
48404	Lemos, Laura	2007	6/22/2007	\$50	A&S	Cash	Gift
48404	Lemos, Laura	2007	6/30/2007	\$5,000	A&S	Cash	Pledge Payment
48404	Lemos, Laura	2007	6/30/2007	\$1,000	A&S	Cash	Pledge Payment

***Now let's use visual discovery™
to better understand this “Top
20” group.***

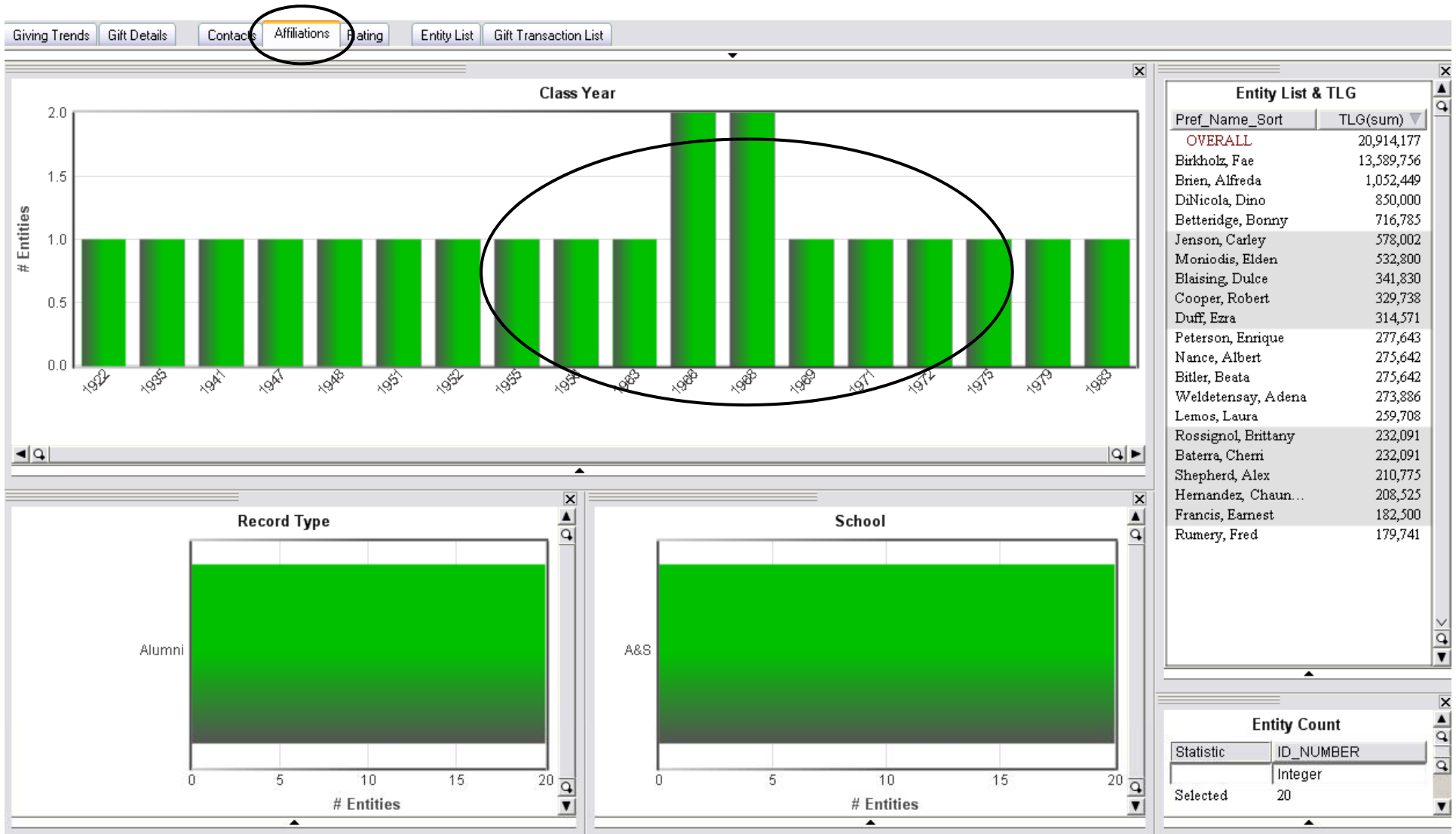
Click → return to the Top 20 – only 27 contacts have occurred across the entire 10 year period!!



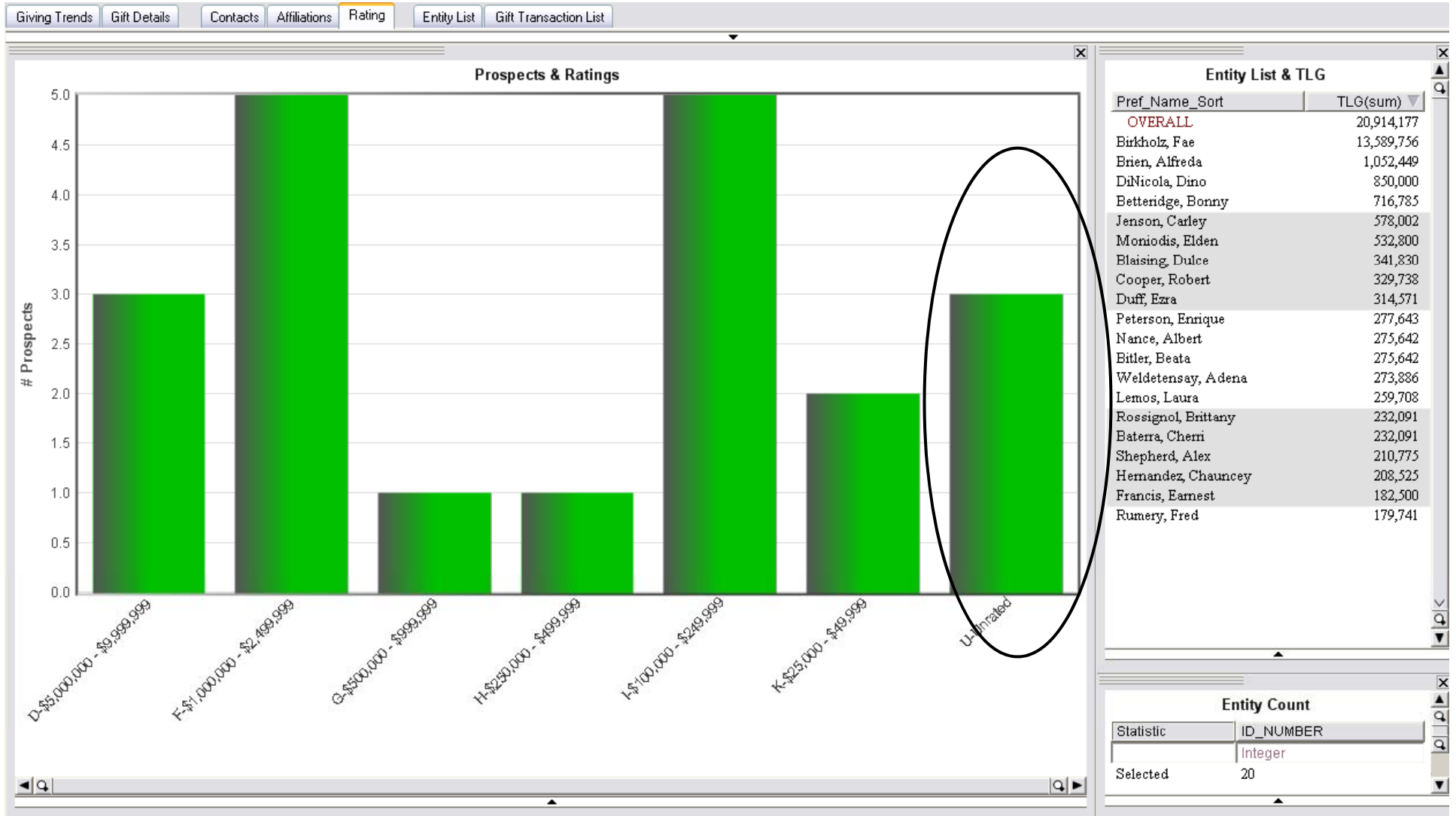
Click on Laura Lemos – only one phone contact 2 years ago!!



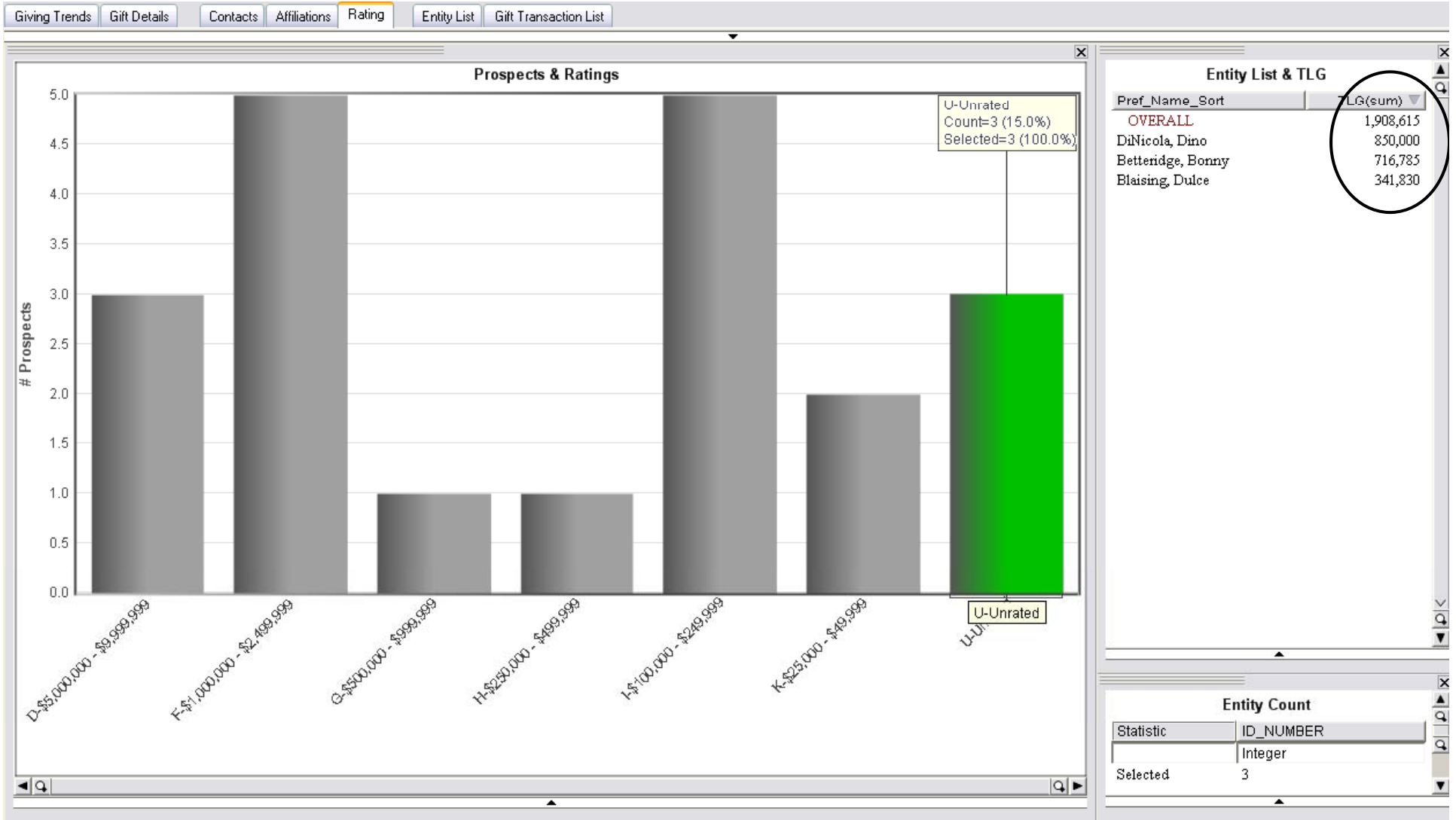
Click on Affiliations Page – “Top 20” tend to be late '60's early '70's. Assign gift officers with affinity.



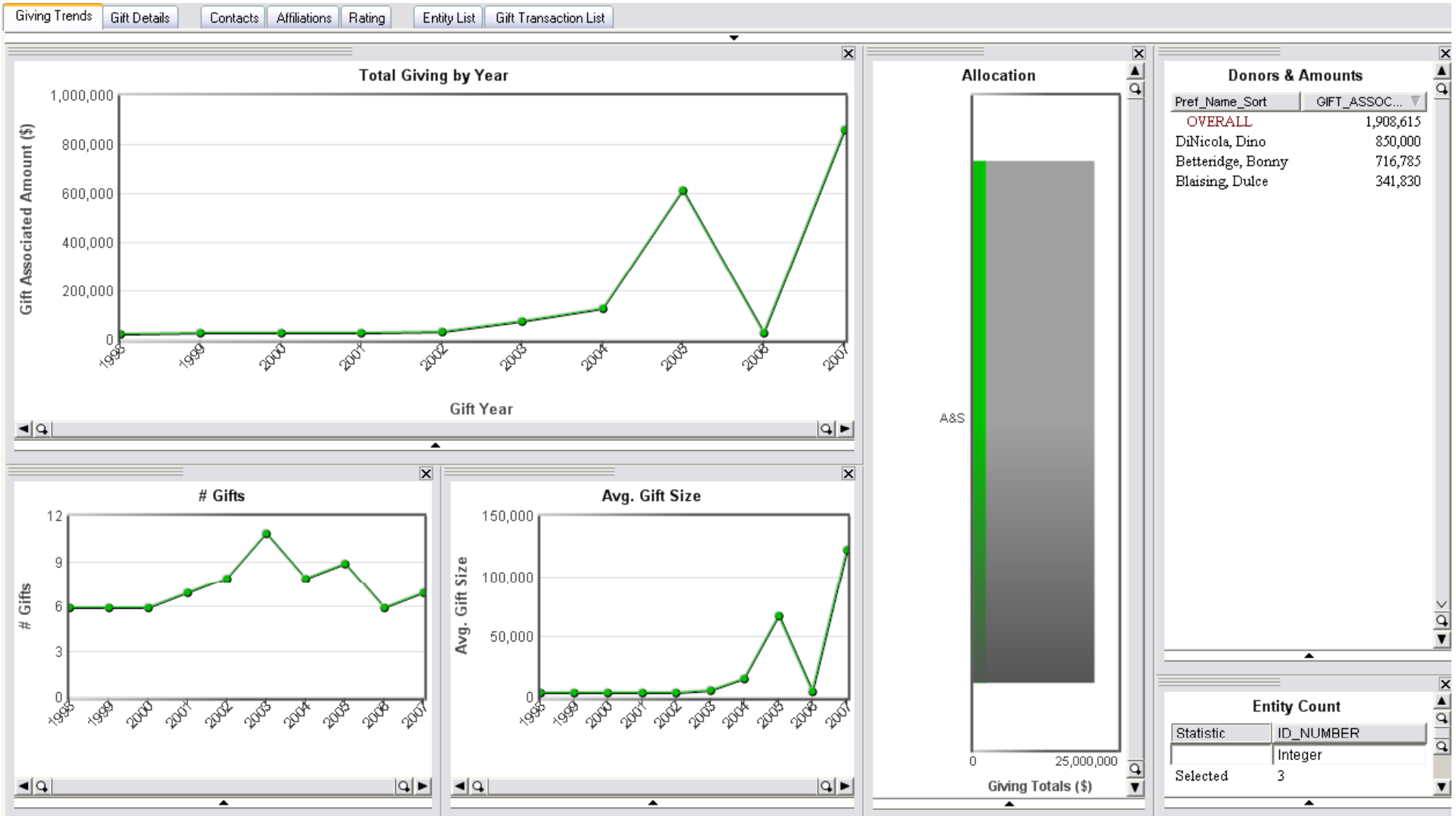
All but 3 are rated . . . who are those 3?



... Click → solid donors ...



... who have been trending up recently. Should be rated and staffed.



List of Top 20 for follow-up.



[Giving Trends](#)
[Gift Details](#)
[Contacts](#)
[Affiliations](#)
[Rating](#)
[Entity List](#)
[Gift Transaction List](#)

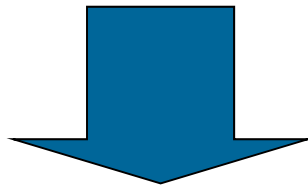
List of Selected Entities // (right click to export)

ID_NUM...	Pref_Name...	TLG	StaffPrefNameSort	CLASS...	RECORD_TYPE	SCHOOL_CODE	GENDER	STATE	CITY	GREEK?	PER...	RATING
8302	Birkholz, Fae	13,589,756	Pierre, Deedra	1922	Alumni	A&S	M	<NULL>	<NULL>	Y	P	I-\$100,000 - \$249,999
17309	Brien, Alfreda	1,052,449	Pierre, Deedra	1956	Alumni	A&S	F	DE	Newark	Y	P	D-\$5,000,000 - \$9,999,999
8421	DiNicola, Dino	850,000	Nylund, Spencer	1935	Alumni	A&S	M	<NULL>	<NULL>	N	P	U-Unrated
24381	Betteridge, Bonny	716,785	Nylund, Spencer	1941	Alumni	A&S	M	<NULL>	<NULL>	Y	P	U-Unrated
26838	Jenson, Carley	578,002	Nylund, Spencer	1952	Alumni	A&S	M	MD	Potomac	Y	P	F-\$1,000,000 - \$2,499,999
25406	Moniodis, Elden	532,800	Nylund, Spencer	1968	Alumni	A&S	M	AZ	McLean	Y	P	H-\$250,000 - \$499,999
16906	Blaising, Dulce	341,830	Pierre, Deedra	1963	Alumni	A&S	M	<NULL>	<NULL>	N	P	U-Unrated
70106	Cooper, Robert	329,738	Nylund, Spencer	1983	Alumni	A&S	M	AZ	Newport N...	N	P	F-\$1,000,000 - \$2,499,999
6756	Duff, Ezra	314,571	Nylund, Spencer	1955	Alumni	A&S	M	AZ	Reston	Y	P	G-\$500,000 - \$999,999
19136	Peterson, Enrique	277,643	Nylund, Spencer	1951	Alumni	A&S	F	AZ	Falls Church	Y	P	F-\$1,000,000 - \$2,499,999
32763	Nance, Albert	275,642	Nylund, Spencer	1966	Alumni	A&S	M	FL	Jupiter	Y	P	D-\$5,000,000 - \$9,999,999
32760	Bitler, Beata	275,642	<NULL>	1969	Alumni	A&S	F	FL	Jupiter	Y	P	D-\$5,000,000 - \$9,999,999
38144	Weldetensay, A...	273,886	Hoffman, Ivelisse	1968	Alumni	A&S	M	AZ	City5	Y	P	F-\$1,000,000 - \$2,499,999
48404	Lemos, Laura	259,708	Hoffman, Ivelisse	1966	Alumni	A&S	M	AZ	City6	Y	P	I-\$100,000 - \$249,999
41286	Rossignol, Britt...	232,091	Hoffman, Ivelisse	1947	Alumni	A&S	M	AZ	City5	Y	P	K-\$25,000 - \$49,999
41288	Batera, Cherri	232,091	Nylund, Spencer	1948	Alumni	A&S	F	AZ	City5	Y	P	K-\$25,000 - \$49,999
39169	Shepherd, Alex	210,775	Benton, Donna	1972	Alumni	A&S	M	AZ	Meadows o...	Y	P	I-\$100,000 - \$249,999
52547	Hernandez, Cha...	208,525	<NULL>	1979	Alumni	A&S	F	AZ	Meadows o...	Y	P	I-\$100,000 - \$249,999
24267	Francis, Earnest	182,500	<NULL>	1971	Alumni	A&S	F	IL	Chicago	N	P	F-\$1,000,000 - \$2,499,999
12144	Rumery, Fred	179,741	<NULL>	1975	Alumni	A&S	F	IL	Wilmette	Y	P	I-\$100,000 - \$249,999

Summary:



- ▲ **Interactive Data Discovery & Analysis**
- ▲ **Quickly Uncover What Matters**
- ▲ **Drill In On Operational Metrics & Details**
 - Trends by school
 - Quickly sort out LYBUNTS
 - Focus on “Top 20” (64% all donations)
 - Develop individual strategies for follow-up
 - Develop better process for the group (contacts, rating, etc.)



- ▲ **Get Details and Take Action**

Who we are . . .

- ▲ **Bell Labs Spin-off**
- ▲ **Over 1,000 Customers – mid market & up; variety of industries; higher ed focus**
- ▲ **Key Strategic Partners:** Alterian, Information Builders, Intel, Intellitactics, Microsoft, Salesforce.com, Sungard HE, Teradata
- ▲ **Well Regarded by key Industry Analysts:** Aberdeen, Forrester, Gartner, TDWI, etc.

Key Benefit: Collaboration

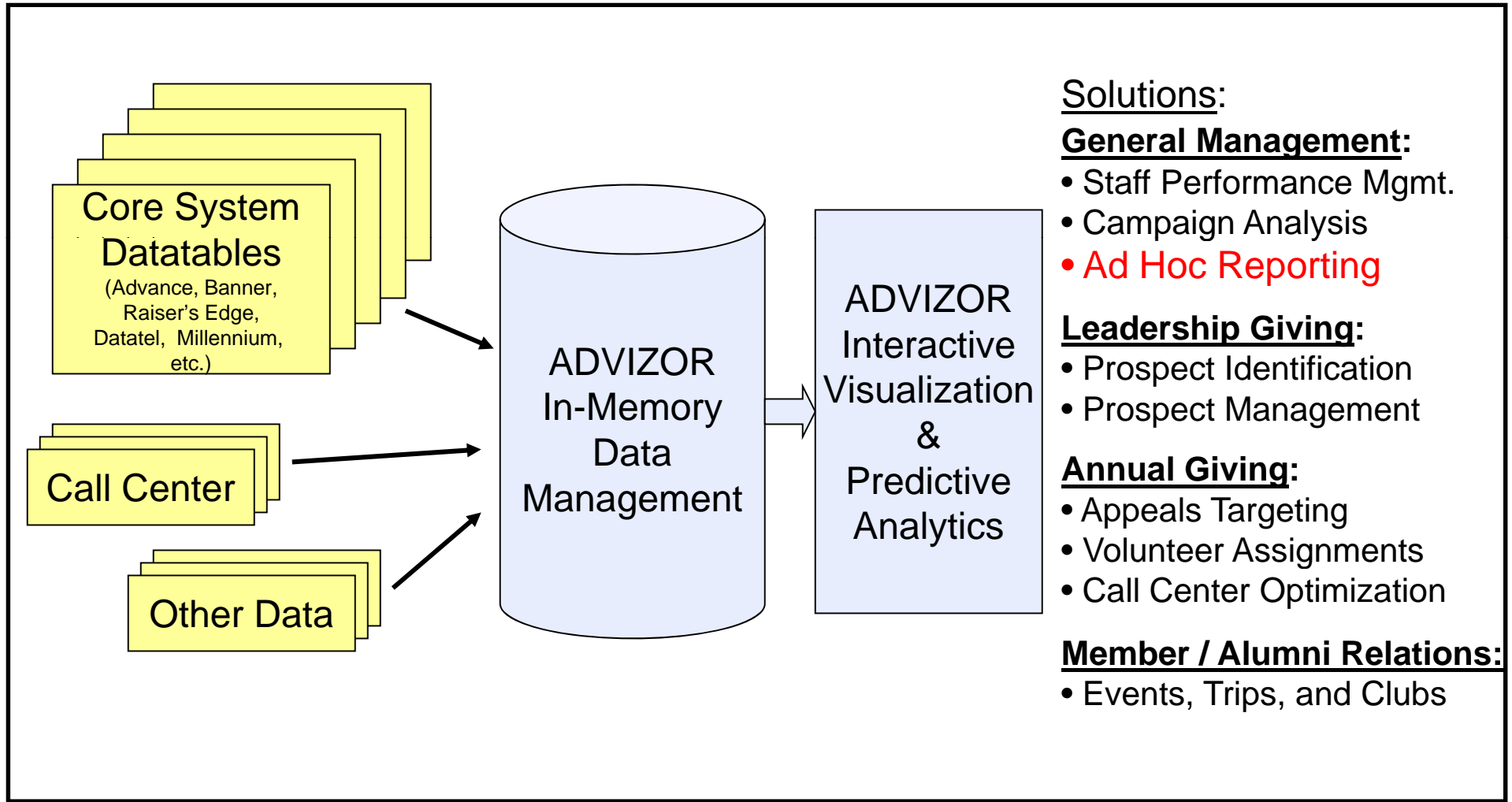


Visual Discovery™ Software

- *In-Memory-Data-Management*
- *Data Visualization*
- *Predictive Analytics*

Well regarded: Gartner “Cool Vendors in Business Intelligence”, “The Rise of Data Discovery Tools”; TDWI “Next-Generation Analytics

Portfolio of Solutions



High ROI in Fundraising



▲ Solution Focus

- **General Management:**
 - Staff Performance Mgmt.
 - Campaign Analysis
 - Ad Hoc Reporting
- **Leadership Giving:**
 - Prospect Identification
 - Prospect Management
- **Annual Giving:**
 - Appeals Targeting
 - Volunteer Assignments
 - Call Center Optimization
- **Member / Alumni Relations**
 - Events, Trips, and Clubs

▲ Variety of Clients:

- Higher Education
- Healthcare
- Faith Based
- Philanthropic
- Social Services



Next Step:



**→ *Contact us for a free assessment.
Your data, your key questions.***

Sales@advizorsolutions.com

630-971-5250

Appendix

Demo Details



- ▲ **5 data tables from SunGard Advance system for 8,000 student school (*data scrambled and disguised*)**
- ▲ **Refreshed daily**
- ▲ **Types of questions being answered:**
 - Where is my giving falling short?
 - Are my efforts creating sustainable increases?
 - Who should we be targeting right now to pick up performance?
- ▲ **Problem with status quo before ADVIZOR:**
 - Advancement Services creating custom reports
 - Backlog and delays
- ▲ **Current ADVIZOR deployment:**
 - ~10 users in development
- ▲ **With Visual Discovery™, every item is selectable.
The dashboard is effectively a very wide “pivot table”**