

DATA HEALTH INITIATIVE

Start: July 2024

Finish: June 2025

Budget: \$51,000

Actual YTD: \$31,028

DATA HEALTH INITIATIVE WORKFLOW

Task	Jan	Feb	Mar	April	May	June
Demos of data health providers	■					
Procurement process to secure contract with chosen vendor		■				
Utilization of wealth screening results	■					
Implement data updates				■		

RISK/MITIGATION

Risk is minimal. It has been close to a decade since either a full wealth screening or thorough audit has been conducted. It is anticipated that any updates or new information that is acquired as a result of these processes will assist with both major gift and annual giving fundraising efforts.

Q2 HIGHLIGHTS

- ✓ A wealth screening service was selected ([iWave](#)), and contract was executed.
- ✓ Data was extracted from our CRM, and a full wealth screening was conducted with iWave.
- ✓ Additional outreach to data health providers was conducted for purposes of securing multiple quotes.

Q3 OBJECTIVES

- Begin utilization of wealth screening results to optimize fundraiser portfolios and enhance strategic targeting of best, potential prospects based upon wealth capacity ratings.
- Select data health service and begin full screen of the CRM in order to update addresses, emails & phones along with other bio information.

Status:



Lead: Kevin Hughes

Pillars: Engage

Date: 2/6/25

DESCRIPTION

As a part of campaign preparation, this is a full wealth screening of our entire alumni database, along with a three-year subscription to a wealth monitoring service, and assistance in identifying the “best-fit” prospects based upon donor behavior. This is also a thorough audit of all alumni data, providing contact info.

