

# 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
Utilization of Wealth Screening Results	[Yellow bar spanning all months]					
Implement Data Updates				[Yellow bar spanning April, May, and June]		

## 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.

## Q3 HIGHLIGHTS

- ✓ Results from wealth screening are now being utilized to optimize gift officer portfolios. The results are enabling us to better target those individuals with financial capacity.
- ✓ Contract was signed with data health provider and initial steps have been taken to submit biographical data for updates.

## Q4 OBJECTIVES

- Continue to refine our utilization of wealth screening data to improve major and planned giving outreach efforts.
- Conduct a full screening of our database to make data updates including addresses, email addresses, phone numbers, etc.

Status:   
 Lead: Kevin Hughes  
 Pillars: Engage  
 Date: 4/8/25

## 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.*

