

DATA HEALTH INITIATIVE

Start: July 2024

Budget: \$51,000

Finish: June 2025

Actual YTD: \$48,573

DATA HEALTH INITIATIVE WORKFLOW

Task	Jan	Feb	Mar	April	May	June
Utilization of wealth screening results	[Yellow bar]					
Implement data updates				[Yellow bar]		

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.

Q4 HIGHLIGHTS

- ✓ Wealth screening data continues to drive and better inform the work of our major & planned gift teams. It is enabling us to better target those alumni with financial capacity.
- ✓ Data updates were received from AlumniFinder and have begun to be imported into our CRM once confirmation has been made that data is accurate.
- ✓ Of close to 60,000 alumni records provided, over 16,000 came back with some type of home mailing address update, over 40,000 came back with a new or updated cell phone number and over 30,000 came back with a new or updated email address.
- ✓ The updated information is already enhancing the advancement team's ability to connect and communicate with alumni, thus engaging those individuals with Winthrop.

Status:
 Lead: Kevin Hughes
 Pillars: Engage
 Date: 5/23/25

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.

