

BAYLOR

UNIVERSITY

Baylor University

Chartered in 1845 by the Republic of Texas and affiliated with the Baptist General Convention of Texas, Baylor is the oldest institution of higher learning in continuous operation in the state and the largest Baptist university in the world.

While remaining true to its heritage, Baylor has grown to almost 14,000 students, and its nationally recognized academic divisions provide 146 baccalaureate degree programs at the undergraduate level. The University also offers 73 master's and 22 doctoral programs, two educational specialists, juris doctor, master of divinity and doctor of ministry. The 735-acre campus is located on the banks of the Brazos River in Waco, Texas, a metropolitan area of 200,000 people.

"We estimate that of the 953 potential donors identified in the process, the University will identify approximately 123-170 constituents who can be assigned for affinity evaluation and lead Baylor to new major donors."

– Jonathan A. Lindsey, Ph.D., CFRE
Assistant Vice President, Donor and Information Services, Baylor University

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ECHELON HELPS BAYLOR UNIVERSITY DISCOVER POTENTIAL

In March 2006, after four decades operating on the basis of geographic assignments, Baylor University began to reorganize its Development Division on the basis of academic and administrative units. Since the mid-1990s, the University's gift officers had been given portfolio assignments that were geographic-focused with some consideration for affinity with the development officer.

Early on in the process, approximately 3,500 constituent units had to be reassigned to new portfolios based on two criteria: school of graduation and history of personal gifts. When this task was accomplished, some gift officers found that their portfolios were "short" of the optimum number of potential donors.

To enrich some of these weaker portfolios, Baylor elected to examine the giving potential for four schools: Honors College, and the Schools of Engineering and Computer Science, Education and Music. Baylor has used Kintera PIN as an electronic wealth screening mechanism since 1999. The university performed an Echelon Power Segments screening in mid-2003 and has been collecting electronic screening data on its constituents since 1992. The result is a rich set of data from electronic screenings, plus a set of locally developed liquid financial assets data.

Baylor decided to determine the number of constituent households in each of these schools that had an Echelon rating of 1-7. This ranking was selected for two reasons: it represents the three highest levels within Echelon Power Segments and because Baylor's constituents had outranked the national norms in each of these areas. The goal was to identify a group of constituents in each of the schools who could be researched and qualified as a suspect, providing the gift officers with unit-focused potential portfolio constituents.

This approach was based on four years of experience with the research staff proactively identifying constituents with high levels of potential discretionary wealth. These constituents were then tentatively classified as suspects, and field staff interacted with them to determine their affinities and cultivate them for gifts.

The initial results were:

ACADEMIC UNIT	POTENTIAL	SUSPECT
Honors College	80	10-15
Music	269	30-45
Education	555	75-100
Engineering/CS (Computer Science)	49	8-10

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Baylor has applied this same approach to all colleges and schools within the University. With all this data, what can Baylor expect from this group? Well, if 10 percent of the prospects identified with an Echelon rating 1-7 gave one percent of their estimated liquid net worth potential each year for the next five years, Baylor has the potential to yield \$75 million.