



**Next River**  
Fundraising  
Strategies

Where the Science and Heart of Fundraising Converge.  
[nextriverfundraising.com](http://nextriverfundraising.com)

# BEYOND THE SCREEN

How Fundraising Intelligence Informs More Than Just Wealth



Kindsight



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# WEALTH SCREENING vs FUNDRAISING INTELLIGENCE

What's In a Name?

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# MR. DONOR PROSPECT

Estimated Capacity: \$600,000	Writer, Musician, Philanthropist
Charitable Giving: \$3,500	Dad of 4 – 3 girls, 1 boy
Political Giving: \$10,000	Mental Health Advocate
Board Memberships: 2	Highly Engaged in Philanthropy/Giving, LGBTQIA+ causes
Philanthropy: Public Safety,	Severe arthritis
Propensity/Inclination: Med	Belt



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# WEALTH SCREENING

**Wealth screening** is the process of comparing your donor or prospect list against publicly available and proprietary data sources to estimate capacity, connections, and giving potential.

- **Real estate holdings** (property ownership, assessed values)
- **Stock holdings & SEC filings** (public company shares, insider trading reports)
- **Business affiliations** (executive roles, board service, business ownership)
- **Political contributions** (federal and sometimes state-level giving)
- **Charitable donations** (to other nonprofits, foundations, universities, etc.)
- **Foundations & trusts** (if they are board members or trustees)
- **Indicators of lifestyle/affluence** (yacht/aircraft registrations, luxury assets, sometimes subscriptions/memberships)

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# FUNDRAISING INTELLIGENCE

**Fundraising intelligence** is the process of interpreting wealth screening data *alongside* other signals — interests, values, behaviors, and networks — to reveal opportunities for deeper connection and stronger revenue.

- **Capacity + Inclination** (not just “can they give?” but “do they want to?”)
- **Identity & Values** (causes they align with, issues they support)
- **Behavioral Patterns** (giving history, event attendance, volunteerism, advocacy)
- **Affiliations & Networks** (companies, boards, community ties, peer circles)
- **Revenue Opportunities** (corporate sponsorship, foundation funding, planned gifts, annual donor upgrades)

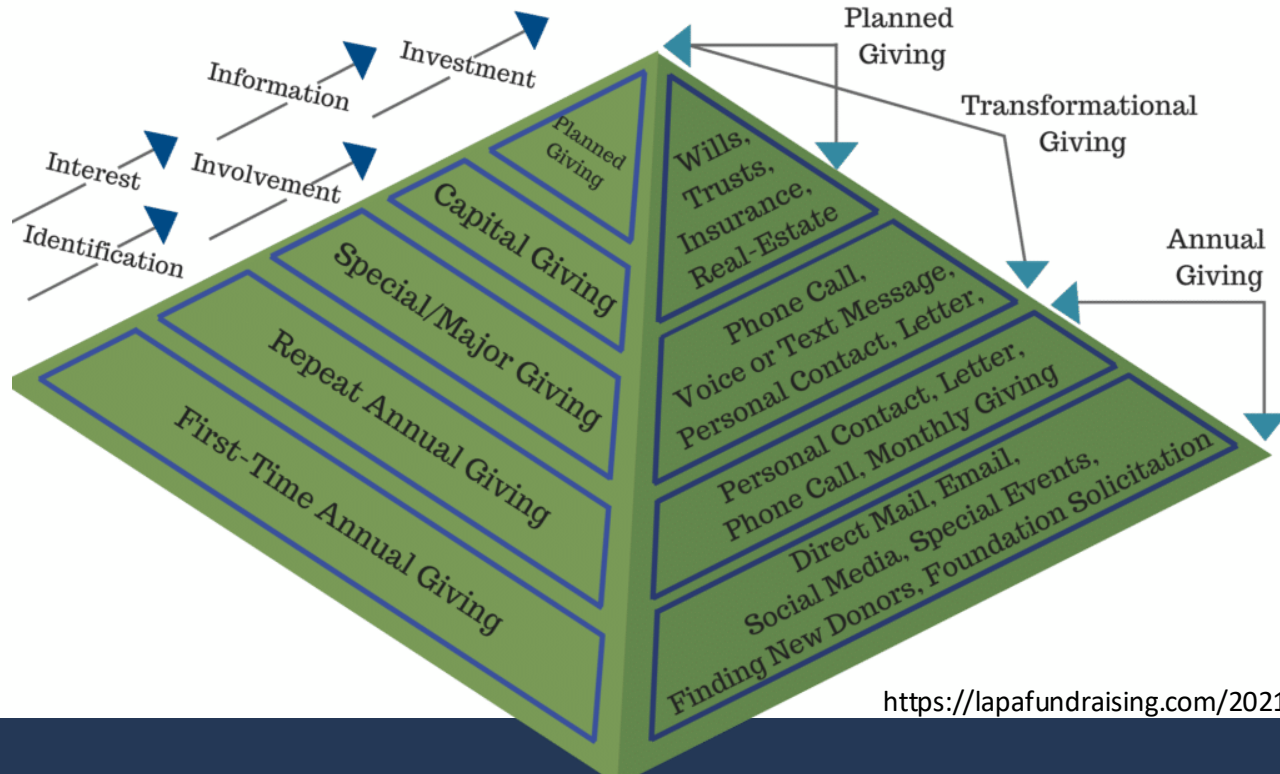
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# FUNDRAISING TODAY

Best Practice Evolves – Principles Remain

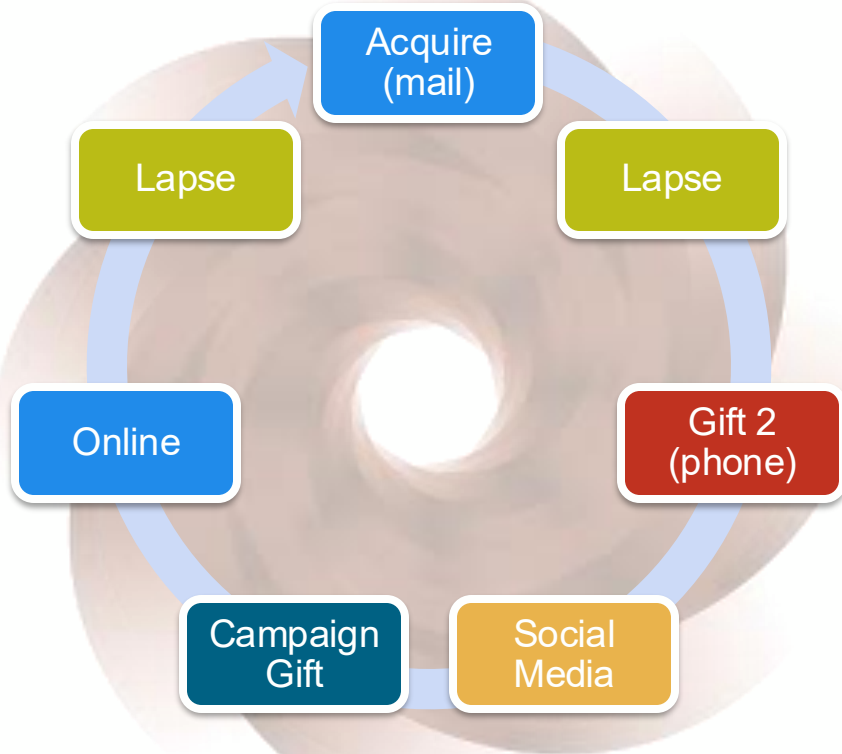
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# THE (OLD) DONOR PYRAMID





# THE NEW DONOR PYRAMID



The modern model is more like a vortex — an energized circle where everyone is equal. People move in and out as needed, and your job is to keep the energy flowing.

Claire Axelrad  
“RIP Donor Pyramid”

<http://www.fundraisingsuccessmag.com/article/rip-donor-pyramid/1>

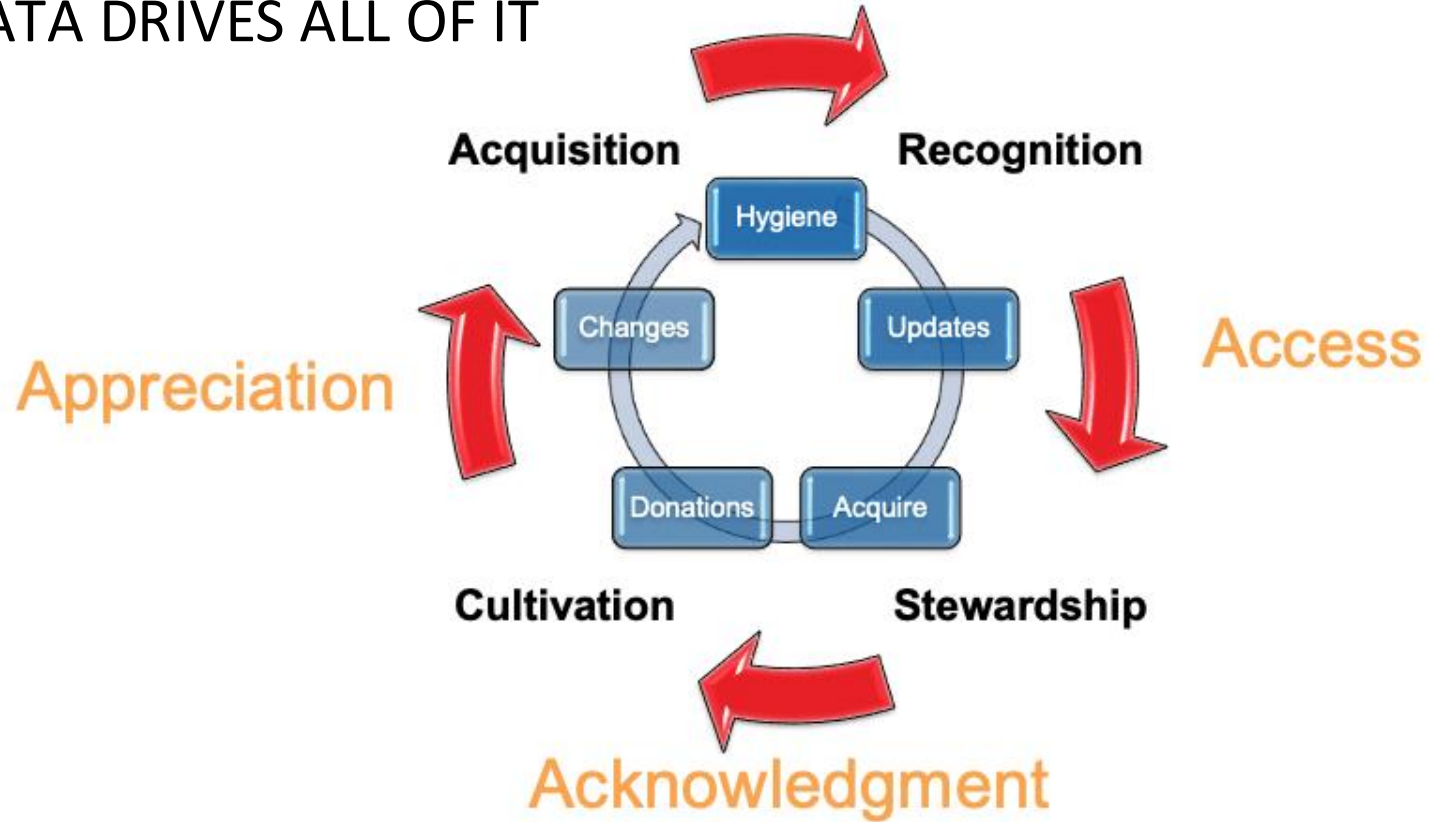
Fundraising Intelligence isn't just about "finding wealthy donors," it's about gaining a deeper understanding of your donors – the **caring, generous humans** that support your mission - their motivations, and how you can engage them more deeply.

# WHAT DO DONORS NEED?

- Access
- Acknowledgement
- Appreciation
- Agency



DATA DRIVES ALL OF IT





In the Venn Diagram of overlap between “people” (i.e. humans) and “donors” the overlap is 100%



“*Why* people give is much less powerful than *who* people are when they give.”

DR. JEN SHANG,  
INSTITUTE FOR SUSTAINABLE PHILANTHROPY



Institute for Sustainable  
**Philanthropy**

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# BEYOND CAPACITY

The Other Information Found In A Screening

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# WHAT'S YOUR FOCUS?

What is the function and focus of your Annual Fund?

- Is it lots of donors giving lower-level gifts (i.e. participation-focused)?
- Is it fewer donors giving higher-level gifts (i.e. dollar focused)?
- Is it only a pipeline for Major and Planned Gifts?
- Is it actually fulfilling that role as a pipeline?
- Is it actively engaging the community and allowing involvement in the mission?

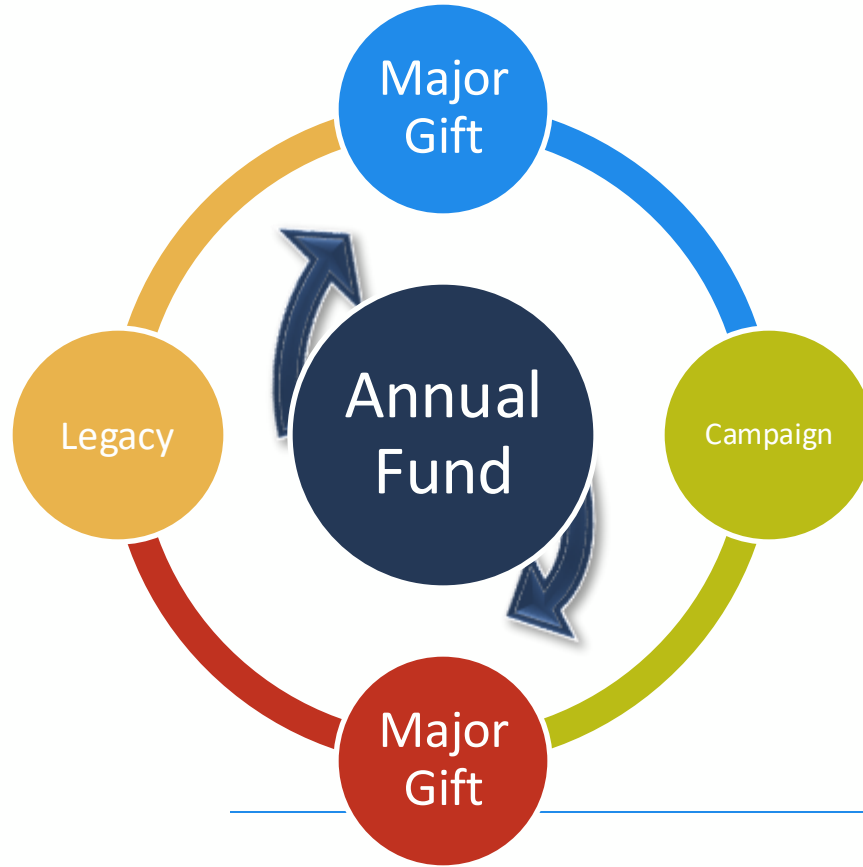
*Is your Annual Fund Transactional or Transformational?*





# MANAGING THE VORTEX

Review Annual Fund giving and Major Gift portfolios (and planned giving, campaign, recurring, etc.) frequently to ensure no donors get “lost” in either cycle . . . Where are the greatest opportunities?



# TEST/SAMPLE SCREEN

Score	Count	Average Last Gift	Average Estimated Capacity
4	2	\$150	\$38,210
3	4	\$126	\$73,749
2	32	\$119	\$91,693
1	188	\$120	\$34,056
Grand Total	226	\$120	\$44,478

# TEST/SAMPLE SCREEN

Capacity Score Range	Count	Average <i>Largest</i> Gift
\$250,000	3	\$385
\$100,000 - \$250,000	11	\$131
\$25,000 - \$100,000	88	\$190
\$0 - \$25,000	124	\$201
<b>Grand Total</b>	<b>226</b>	<b>\$120</b>

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# WHAT DO WE DO WITH THAT INFO?

- Segmentation
  - Ask Amount Strategies
  - Stewardship/Cultivation/ Moves Management Strategies
  - Case Development
  - Resource Allocation
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# YOUR TWO PRIMARY SCENARIO



## Acquisition

Do you have “enough” donors? Finding new wealthier donors isn’t always the answer.



## Renewing – Re-Engaging

Your ‘best’ prospects are likely already in your database. Unless you have no database.

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# INTELLIGENCE INFORMS ACTION

- Giving History – first and foremost
  - *The strongest indicator of likelihood to give is previous giving.*
- Linkage – who knows them, who do they know?
- Behavioral data – events, volunteering, email opens, clicks, other engagement
- Appended data – insights, demographics, hygiene & quality
- Screened data – fundraising intelligence – capacity/propensity/likelihood, etc.

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# BEYOND THE SCREEN

<b>Number of Constituents</b>  226	<b>Total Estimated Capacity</b>  \$8,584,301	<b>Properties Total Value</b>  \$117,431,055
<b>Foundation Board</b>  9 Public Foundation Board  1 Private Foundation Board	<b>Charitable Giving</b>  121 Donations Count  \$97,342 Donations Total Value	<b>Internal Giving</b>  1,989 Total Gift Count  \$170,245 Total Gift Value

# BEYOND THE SCREEN

 **Hidden Gem**

5  
\$349,867

 **Distinguished Philanthropist**

1  
\$21,545

 **Not Now Prospect**

197  
\$7,659,734

 **Your Champion**

23  
\$553,155



# BEYOND THE SCREEN

## Cultivation Analytics



Storytelling

10

\$2,377,987



Personalization

4

\$660,970



Annual

189

\$4,751,061



Research-Driven

23

\$794,283

# BEYOND THE SCREEN



**Team**

14

\$3,038,956



**Leadership**

0

\$0



**Social**

207

\$5,363,371



**Ambassador**

5


\$181,974

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# THE 2025 MINDSHIFT

The entire purpose of data in "The Connection Economy" is to point us towards values, identity, and true affinity.

Capacity and asset value is the least interesting fact, but can assist with prioritization.



# WHAT DO WE DO WITH THIS INFO?

- Segmentation
    - History + Capacity + Cultivation/Engagement
  - Ask Amount Strategies
    - Test increased asks for higher rated
  - Stewardship/Cultivation/ Moves Management Strategies
    - Portfolio allocation, higher touch
  - Case Development
    - Storytelling vs Impact vs Research
  - Resource Allocation
    - Who does what and when
-

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# SEGMENTATION IDEAS

- Consider “Higher Touch” for “Higher Wealth” – prospecting
  - More personalized, more donor-centered, very specific
  - Tailor specific case to increased asks
  - Track, test and repeat – watch these lists closely
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Visit [www.kindsight.io/iwave](http://www.kindsight.io/iwave) to learn more  
about Kindsight's Fundraising Intelligence  
services.

