WELCOME TO THE RAISER'S EDGE 7.92 SPEED WEBINAR SERIES! TODAY'S FEATURE: THE GIVING SCORE AND WEALTHPOINT



Unlock your potential with the new features in The Raiser's Edge®

It's Almost Time!
Get ready for the newest, smartest release of The Raiser's Edge yet.

blackbaud

> WHAT'S NEW! THE RAISER'S EDGE 7.92

Presented by Rob Rexing, Product Support Lead II

- We expect over 1,000 attendees on today's webinar. Please use the Q&A
 Panel to submit questions. We will not be able to answer all questions during
 this session, so you will receive an email from Blackbaud answering your
 questions after the webinar. Please refrain from using Chat to submit
 questions.
- The audio for this webinar will be broadcast through your computer. Once you
 join the presentation, a small audio broadcast box will appear on your screen
 and you will hear the host through your computer speakers. If you are unable
 to listen to the audio through your computer and wish to dial into the
 conference line, please use the information below:

Teleconference information

Call-in toll-free number: 1-866-4106539 (US & Canada)

Call-in number: 1-660-4225471 (US & Canada)

Conference Code: 843 654 3232

> THE GIVING SCORE™ - BASED ON LIKELIHOOD & CAPACITY

Helps you raise more money by:

- Giving you the power to target and identify your best supporters
- Saving you time and money by knowing who to invest in and who not to invest in
- Improving efficiency with managing your constituents in RE
- Segmenting your constituents into four unique groups based on their likelihood & capacity to give a gift to your organization



➤ THE GIVING SCORE™ - HOW WE DO IT

- The Giving Score[™] Applies Smart
 Analytics or Segmentation to your
 Database
- Blackbaud looks at hundreds of external demographic and financial characteristics and combines that data with historical giving information from your organization to score your database
- Scores will be returned on individuals who have a complete US address
- Corporations & Foundations will not receive a score



➤ DEMYSTIFYING THE GIVING SCORE RATINGS ALGORITHM

- Based on an individual's likelihood and capacity to make a gift to your organization
- The algorithm analyzes 2 types of data to score each individual
 - YOUR data
 - Giving history of your donors at the individual level
 - Home address of constituents
 - External data sources at the neighborhood level
 - Credit information (Equifax) & Demographic information (US Census Bureau)
 - We are not looking at individual credit ratings/reports
 - Summarized statistics at the Zip + 4 or Neighborhood Level
 - WealthPoint data is not included in the Algorithm

➤ DEMYSTIFYING THE GIVING SCORE RATINGS ALGORITHM

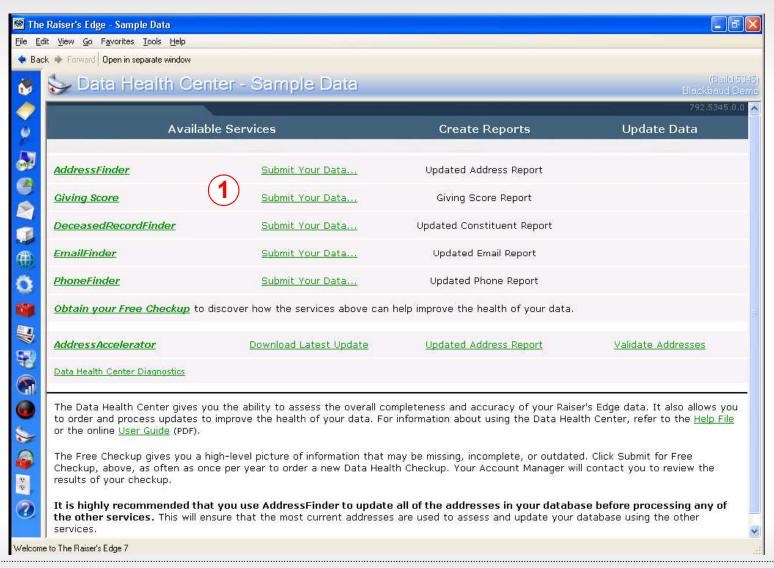
- Possible Scores
 - VIPs match high on all characteristics for affinity and capacity
 - Non-Donor scoring as a VIP = matching all or almost all external variables
 - FANs match high on affinity, but much lower on capacity
 - LongShots match high on capacity, but much lower on affinity
 - Acquaintances do not match affinity or capacity characteristics
- How someone scores will depend on how well they match the external variables in the model + their giving history.
- If they have never given a gift, they can still receive a score due to the ability to match on the external variables.

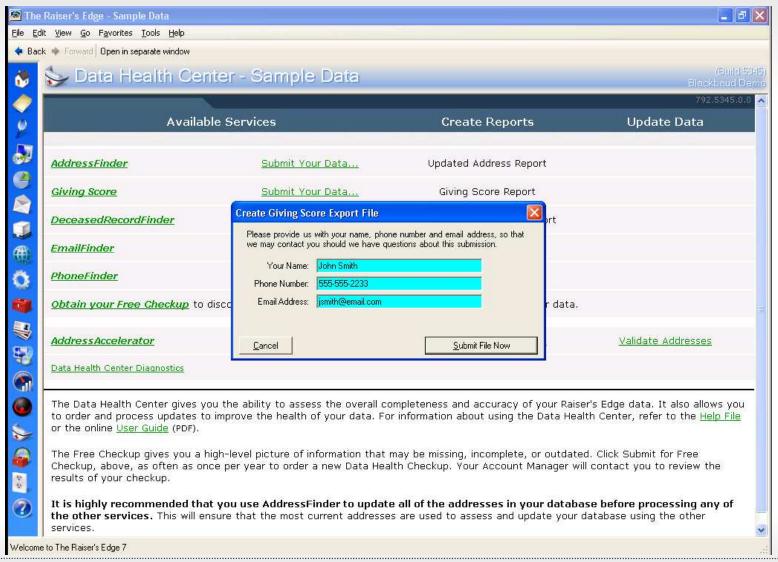
HOW IS GIVING SCORE DIFFERENT THAN WHAT OUR CUSTOMERS DO TODAY?

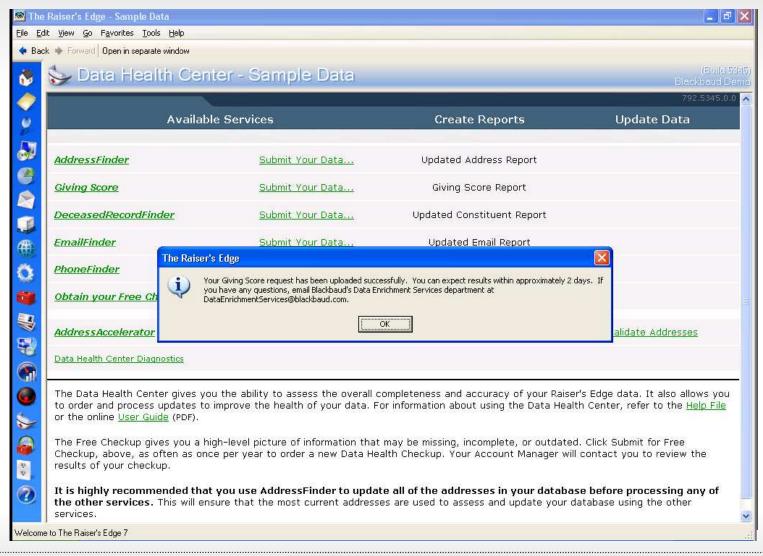
Without additional data, you may only see one side of the story:

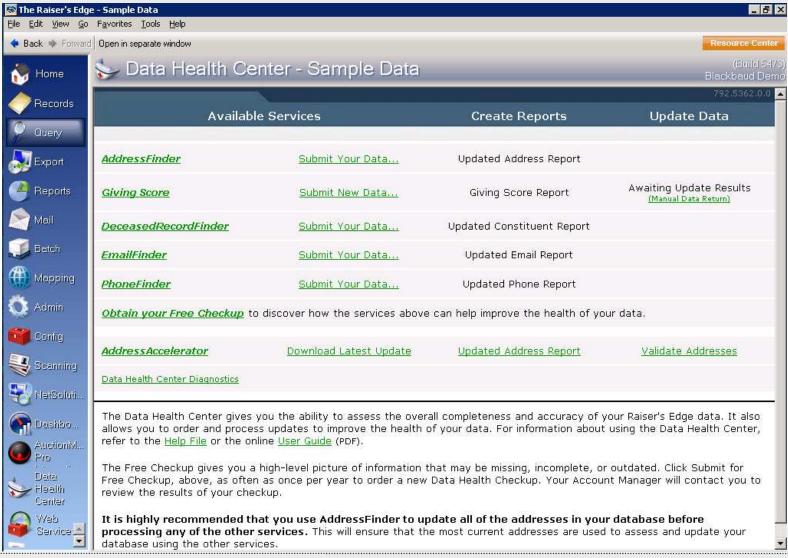
- Major Giving
 - You look at giving history and see that a donor has given \$100 over the last 3 years, so you may not put much focus on them
 - However, once you run the Giving Score you see they scored as a VIP
 - Now you have a new prospect and will want to spend more time cultivating them
- Annual Giving
 - You have a 1000 non-donors to include in your mailing and don't know who to cut out due to your budget
 - You run the Giving Score and see that you have 400 Acquaintances in that group
 - Now, you can immediately cut the 400 people out of the mailing because they don't love you and they don't have money to give to you

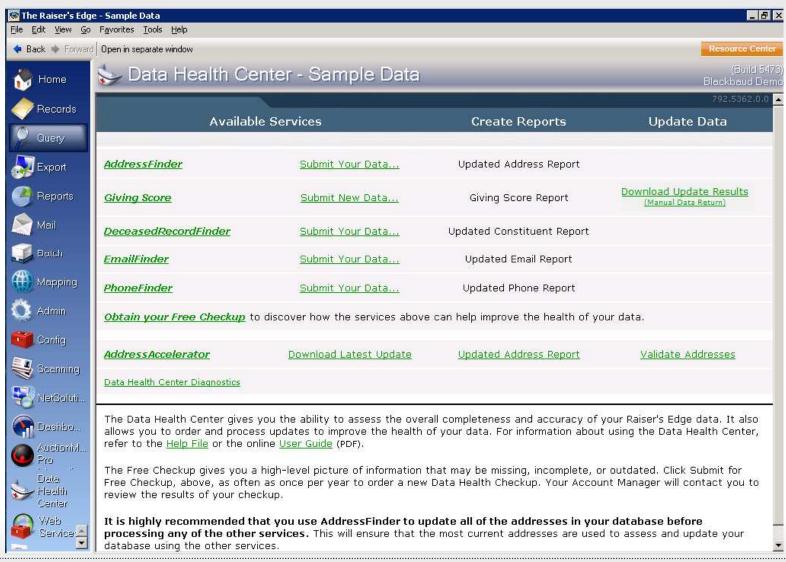


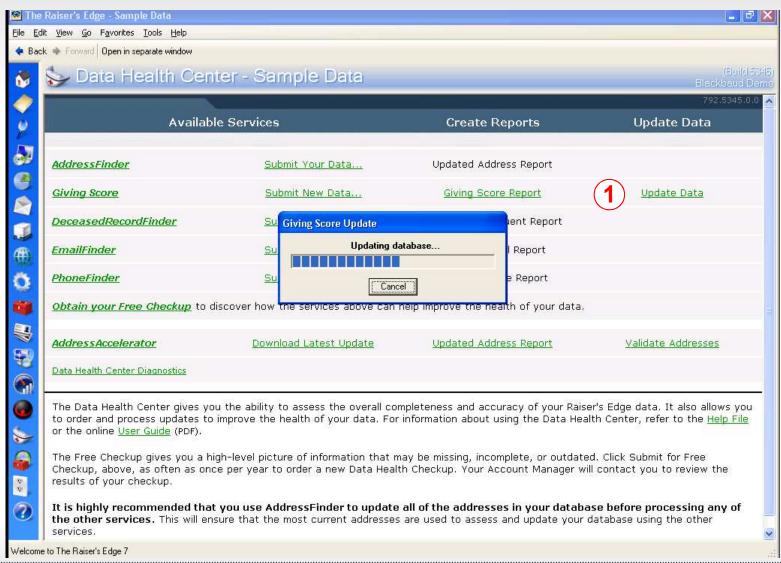


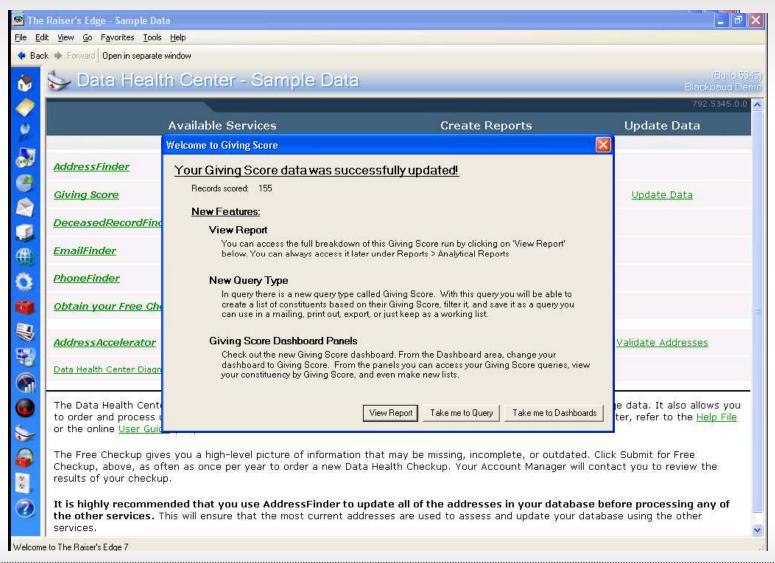




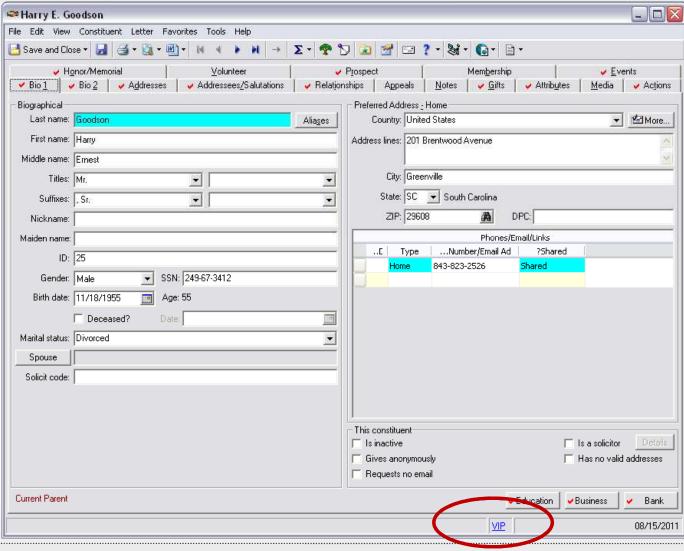






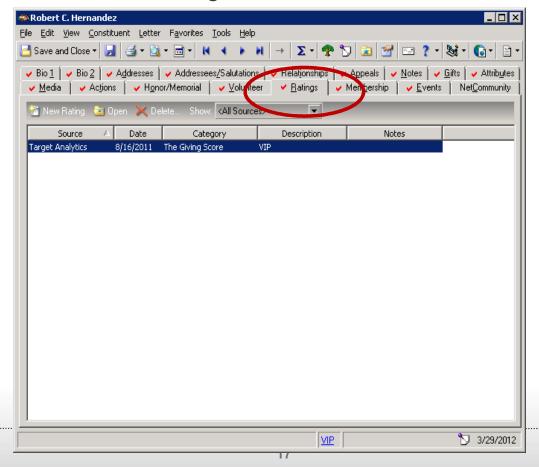


> WHERE DO THE SCORES SHOW UP IN RE?



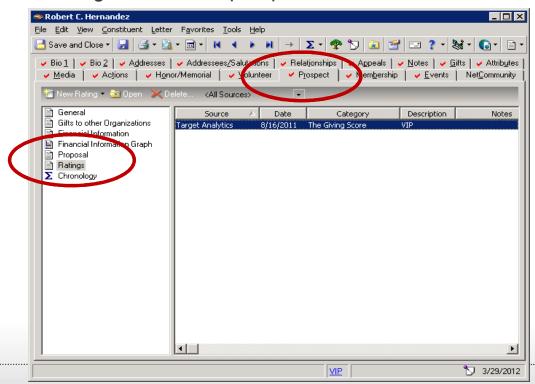
➤ WHERE DO THE SCORES SHOW UP IN RE?

- In RE 7.92, a new Ratings Tab will appear for organizations that currently don't have the RE:Search Module aka the Prospect tab in RE
- The new Ratings Tab will house The Giving Score but also offers users the ability to create their own ratings for their constituents



➤ WHERE DO THE SCORES SHOW UP IN RE?

- For customers that have the RE:Search Module aka the Prospect tab in RE, The Giving Score will show up under ratings
- The Prospect Module also includes the ability to track Wealth Information, Giving to Other Non Profits as well as the ability to create and track proposals for major and planned giving and grant prospects
- When you use WealthPoint for RE, the details of your results appear in the financial and gifts to other organizations in prospect tab



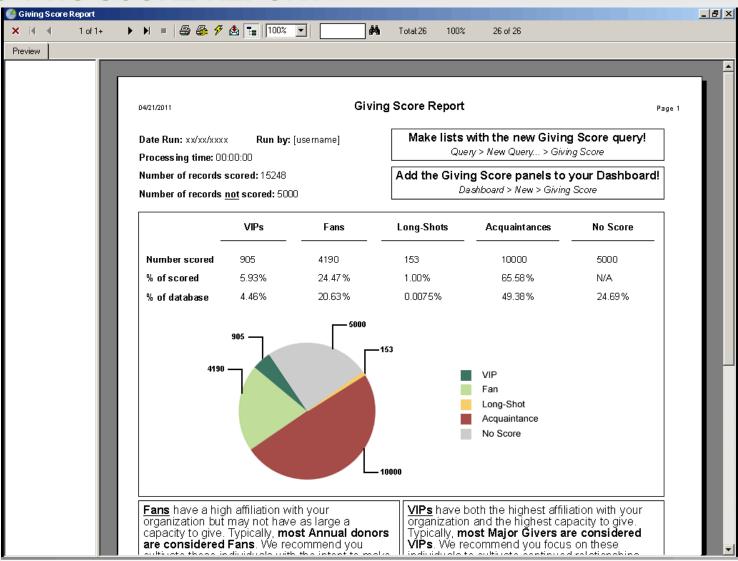


> WHEN TO RUN THE GIVING SCORE

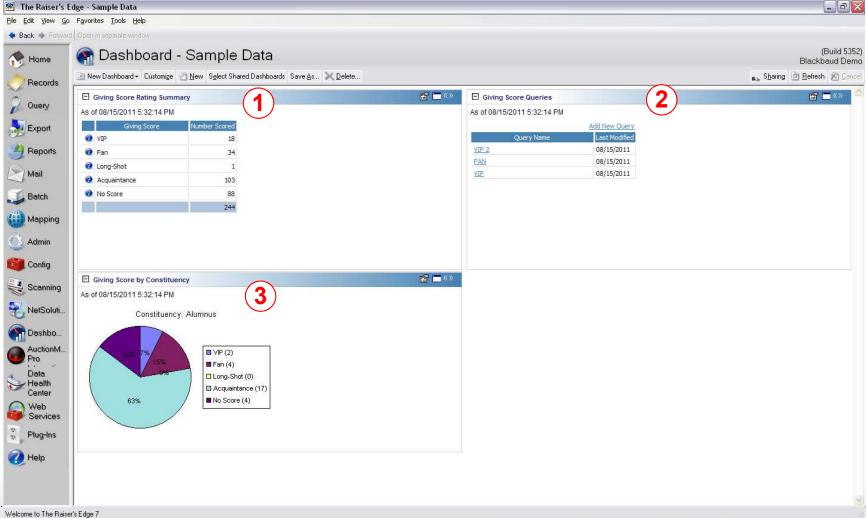
- Initially To score your existing data set
- Ongoing
 - After you receive a significant number of new gifts or very large gifts
 - Annual or Capital Campaign
 - After you add large groups of names to your database
 - List import
 - Special Event

➤ GIVING SCORE REPORT, DASHBOARDS, & QUERY

➤ GIVING SCORE REPORT

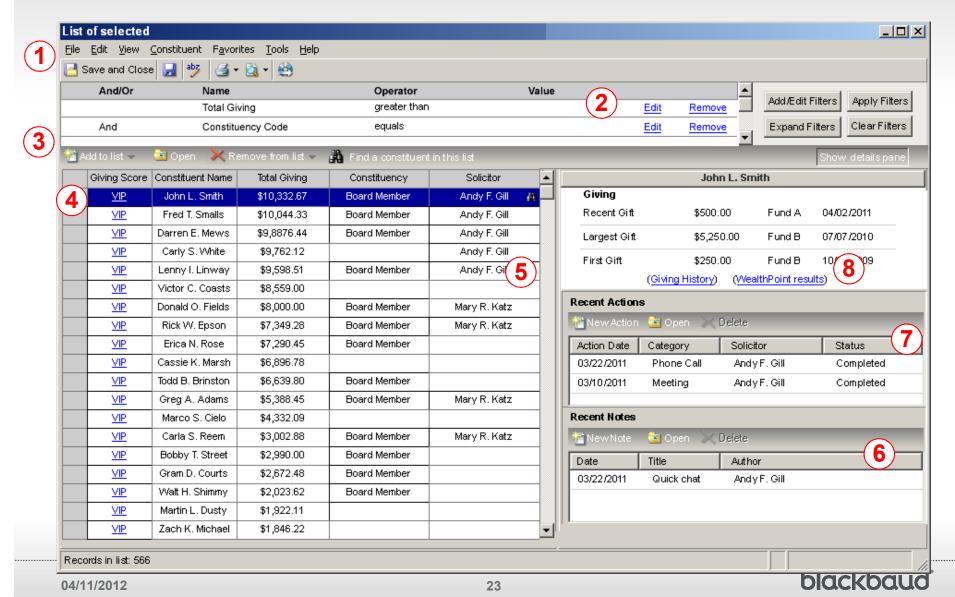


➤ GIVING SCORE DASHBOARDS



04/11/2012

➤ GIVING SCORE QUERY



▶ WEALTHPOINT

- WealthPoint is a detailed screening to uncover actual wealth, career and philanthropic connections on individuals most likely to be major gift prospects
- WealthPoint pulls information from twelve of the most respected data sources to find and return the most current, accurate information on your prospects.
- WealthPoint can identify the following information that is publically available and voluntarily disclosed:
 - Real estate values
 - Public company insider stock holdings & some private company affiliations
 - Federal political donations & some charitable donations
- WealthPoint cannot identify the following information due to privacy laws:
 - Debts & Bank Account Holdings
- WealthPoint for RE has strict & relaxed matching to help limit false matches

> WEALTHPOINT DATA SOURCES

Hard Asset Data









FIS

MARQUIS W108W10°











Employer and Career Information, Compensation, Private Company Stock Ownership, Management Biographies

MarketGuide Profiles: Biographical and Financial Data on Corporate Officers and Directors

Public Stock Holdings/Transactions by Corporate Officers, Directors, Major Shareholders; Transaction Histories, Last-traded Stock Prices

Primary and Secondary Holdings of Real Estate, Estimated Property Values, and Properties in Trusts

Detailed Self-reported Biographical Information Including Education, Interests, Children, etc.

Presence of Luxury Items Like Planes, Yachts, and Other Indicators of Wealth

Nonprofit Officers and Board Members Identification, Private/Family Foundations

Up-to-date Charitable Giving Data Exclusive to Target Analytics That Includes Gift Type, Size, Date, and Recipient

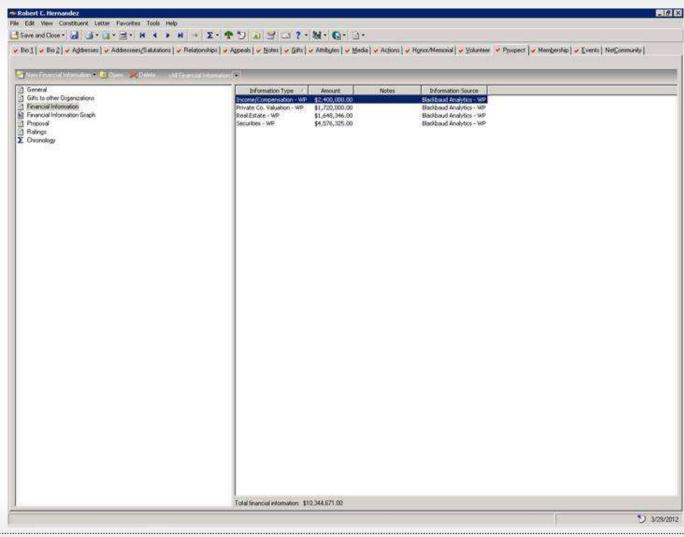
Up-to-date Charitable Giving Data That Includes Gift Type. Size, Date, and Recipient

In Depth Information on More Than 2 Million Federal Elections Contributions Including Amount and Recipient

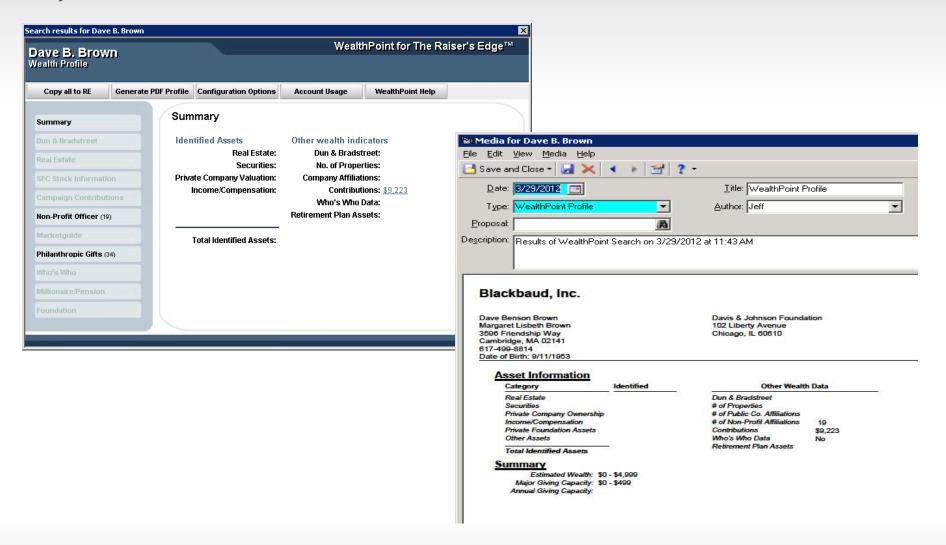
Wealth Indicators

Philanthropic Interests

▶ WEALTHPOINT



➤ WEALTHPOINT – PROFILE REPORT ATTACH TO MEDIA TAB



➤ THERE IS MORE FOR YOU WITH 7.92!

> ADDITIONAL PRE-RELEASE SPEED WEBINARS

Register here

• 4/11 - Events - Laurel Stello



• 4/12 - Constituent enhancements - Jacob Moore



▶ BLACKBAUD MERCHANT SERVICES (BBMS)

BBMS is Blackbaud's credit card processor that is fully integrated into The Raiser's Edge version 7.91 and higher

- Full PCI compliance
- 10-year history of processing payments
- Blackbaud OneRATE™ for all transactions
 - No hidden or additional fees
 - Support for all types of transactions
- Time savings
 - Reduced double entry
 - Easier bank reconciliation
- Free web portal
- Multiple currency support

Sign up for BBMS today! https://bbmsmerchant.blackbaud.com/

Learn more in our "Streamlining Your Payment Processing" Webinar blackbaud.com/bbmswebinar

> YOUR RAISER'S EDGE RESOURCES

Customer Resource Center

https://www.blackbaud.com/re-new-release

- Includes:
 - Your FAQ's Answered
 - An upgrade checklist
 - New Features Guide & Videos
 - As a maintenance customer, FREE Raiser's Edge Training with Start Learning



Get Started with Start Learning Today!