



Portfolio Strengths

Goal

- Develop a weight system to transparently and quantitatively evaluate portfolio strength of the prospect, primary solicitor portfolio and region
- Provide analysis that will assist in recalibrating and optimizing portfolios
- Provide analysis that will assist in the planning of annual fiscal year goals

Prospect	Portfolio Strength Score
Prospect1	112.16
Prospect2	104.60
Prospect3	84.60
Prospect4	69.69
Prospect5	31.54
Prospect6	26.78
Prospect7	19.74
Prospect8	18.66

Primary Solicitor	Prospect Count	Average Portfolio Strength Score
Solicitor1	77	148.19
Solicitor2	70	105.03
Solicitor3	30	94.27
Solicitor4	64	93.15
Solicitor5	74	81.95
Solicitor6	33	81.52
Solicitor7	48	72.60
Solicitor8	49	71.22

Methodology

- **Prospect Score** = $\text{Sum}(\text{Variable} * \text{Weight})$
 - Example of Variable * Weight
 - Campaign Cabinet Member = $1 * 114.72$
 - Non-Campaign Cabinet Member = $0 * 114.72$
- Primary Solicitor Scores:

Total Portfolio Strength Score = Sum of Prospect Scores

Average Portfolio Strength Score = Average of Prospect Scores

Score Sum = Average Portfolio Strength Score + Average Capacity Rating Score

Variables

- Bio. Information
 - Age range, marital status, record type, degree
 - Field of work, job title
- Activity Attendance
- Current Affiliation
- Historical Giving
 - Number of Major Gifts
 - Number of Years within last 5 FYs with Extended Production or Cash

Variables (detailed version)

BIO

- Age Range
 - 0-39
 - 40-49
 - 50-59
 - 60-69
 - 70-79
 - 80-89
 - 90+
- Marital Status Type
 - Single
 - Married or Widowed
 - Divorced or Separated
- Number of Children
 - 0
 - 1
 - 2
 - 3
 - 4+
- Number of Major Donor Relatives
 - 1
 - 2+
- Current Covering Account Representative (Family Foundation, Foundation and Organization)

BIO

- Record Type and Spouse Record Type
 - Both Spouses AL but not PA
 - Both Spouses AL/PA
 - Both Spouses PA but not AL
 - Both Spouses = Other (FR, EM, ST, RE, etc.)
 - One Spouse AL but not PA and One Spouse Other
 - One Spouse AL/PA & One Spouse PA
- Grandparent Indicator
- ND School
 - SCH_AL_IND
 - SCH_BA_IND
 - SCH_EG_IND
 - SCH_GB_IND
 - SCH_SC_IND
 - SCH_UN_IND
 - SCH_AR_IND
 - SCH_GR_IND
 - SCH_LW_IND
- NON ND Degree
 - Bachelor Indicator
 - Master Indicator
 - Doctorate Indicator

FIELD OF WORK

- Architecture
- Art, Design, Entertainment, Sports, & Media
- Business/Financial
- Computer/Math
- Construction/Manufacturing
- Consulting
- Education
- Engineer
- Law
- Life, Physical, & Social Science
- Management
- Marketing/Advertising
- Medicine
- Public Service
- Religious
- Sales
- Other (Hotel/Restaurant, Military, Research, Associate)

JOB TITLE

- VP or Assistant VP
- Director
- Manager
- Chairman and C Suite
- Partner Principal EVP and SVP

ACTIVITY (Lifetime)

- Alumni Association Event Attendee (excl. Reunion)
- Alumni Reunion Attendance
- Campaign Fly-In Attendee
- Campaign Fly-Out Attendee
- Campaign Leadership Weekend Attendee
- Stewardship Event Attendance
- Wall Street Event Attendance

AFFILIATION (Current)

- Advisory Council Indicator
- Board of Trustee Member
- Campaign Cabinet (Boldly or Spirit)
- Gift Planning Advancement Committee Member
- Badin Guild Member
- Corby Society Member
- John Cardinal O'Hara Society Member
- Order of St. Thomas More Member
- President's Circle/Cavanaugh Council Indicator
- Rockne Heritage Fund Member
- Sorin Society Member

HISTORICAL GIVING

- Number of Major Gifts
- Number of Years within last 5 FYs with Extended Production or Cash

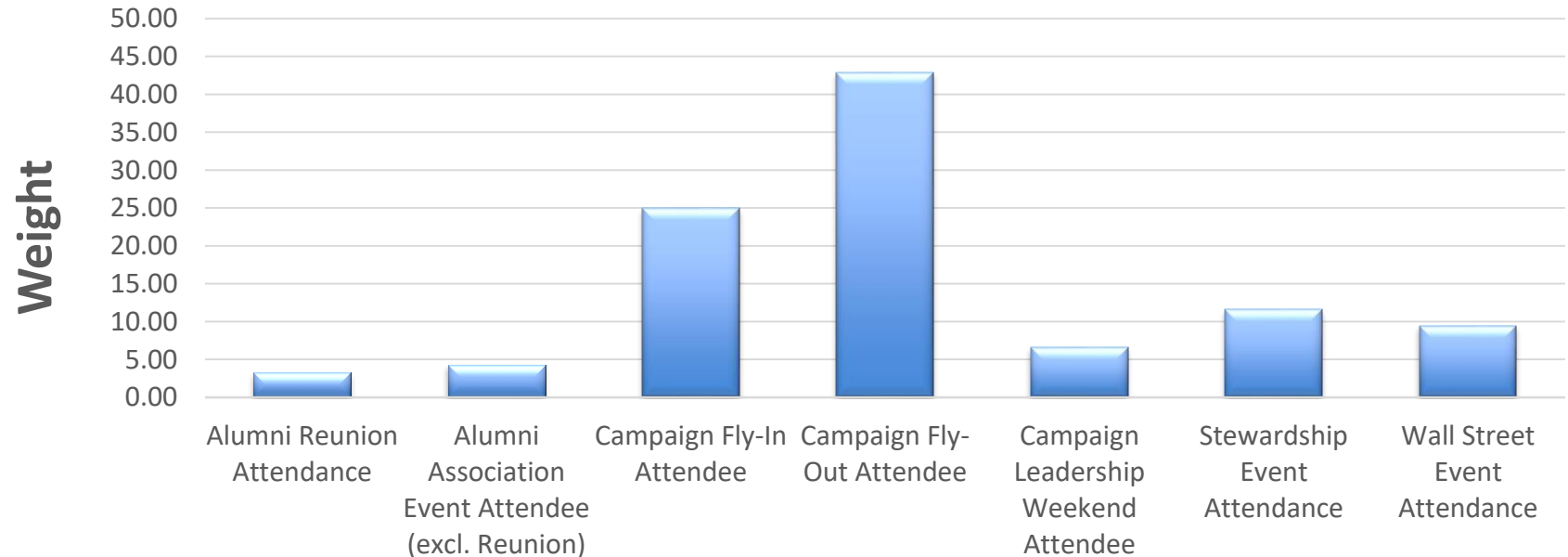
Weight

- Based on Extended Production Amount during Spirit & Boldly Campaign

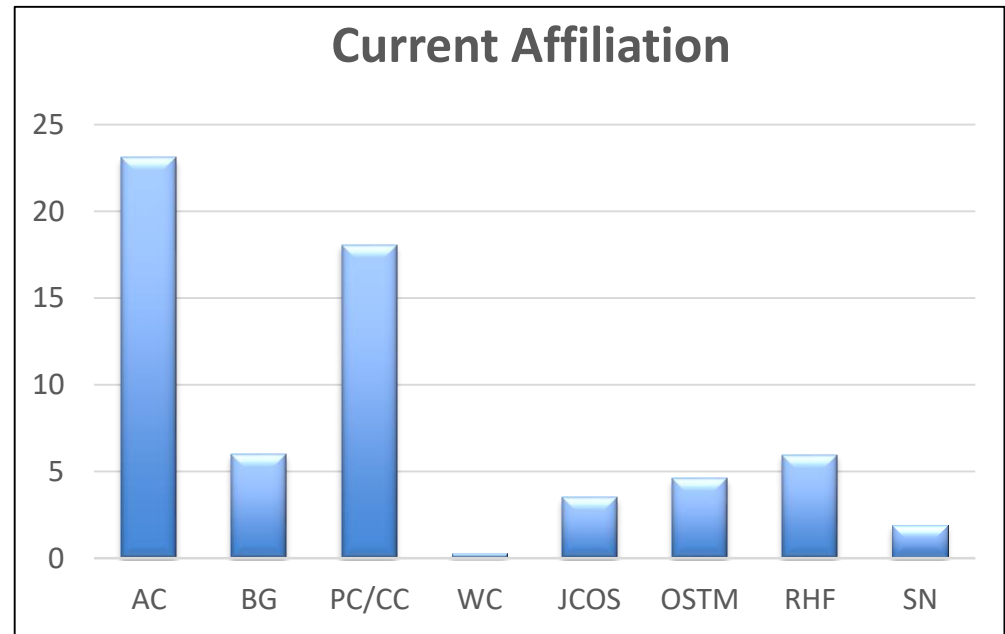
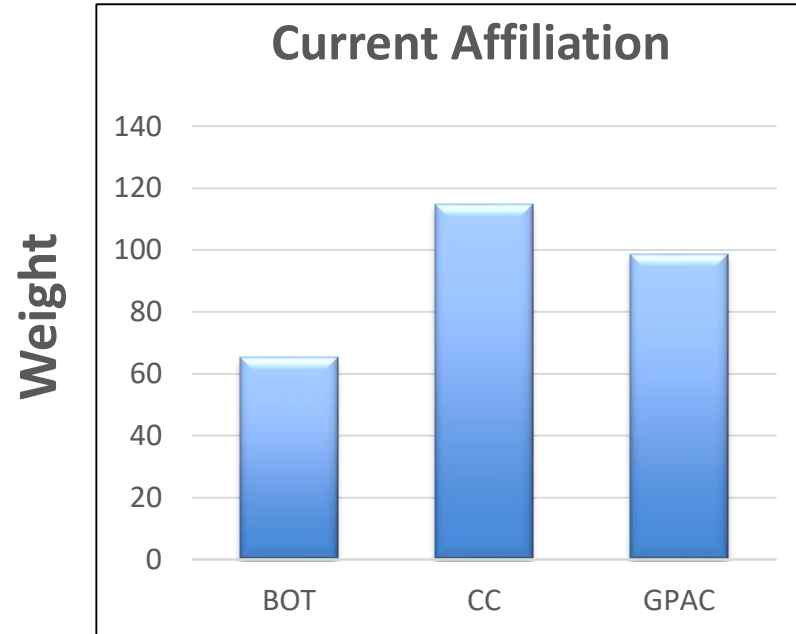
Variable	Count	Extended Production Amount Sum	Extended Production Amount Mean	Weight
Lifetime Alumni Reunion Attendance	5,000	\$1,000,000,000	\$200,000	2.00
Current Sorin Society Member	1,000	\$777,777,777	\$777,777	7.77

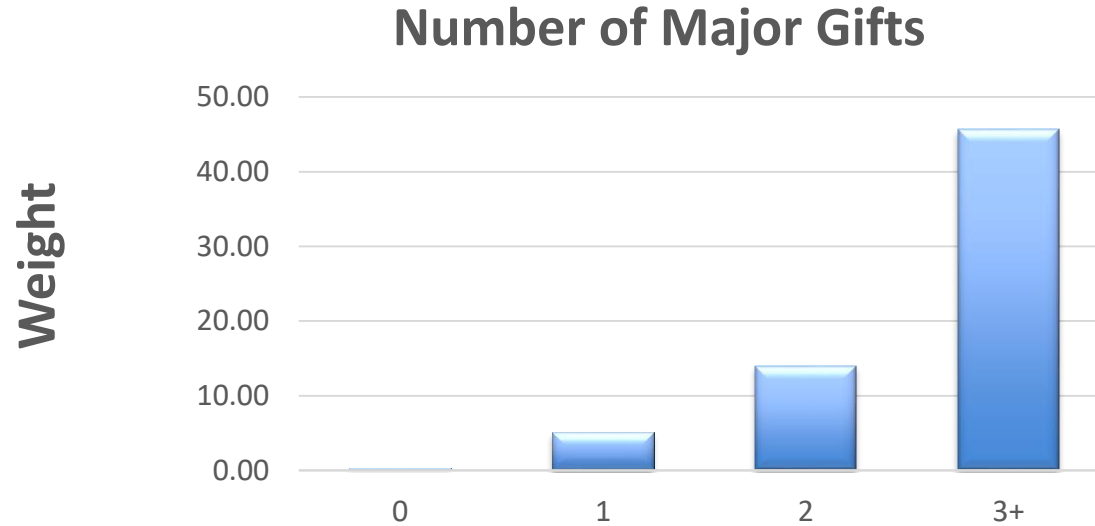
- True for All Variables Except Age Range, Current Badin Guild Member

Lifetime Activities



Weight





Questions?

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Appendix

Age Range

Each transaction was associated with prospect age range.

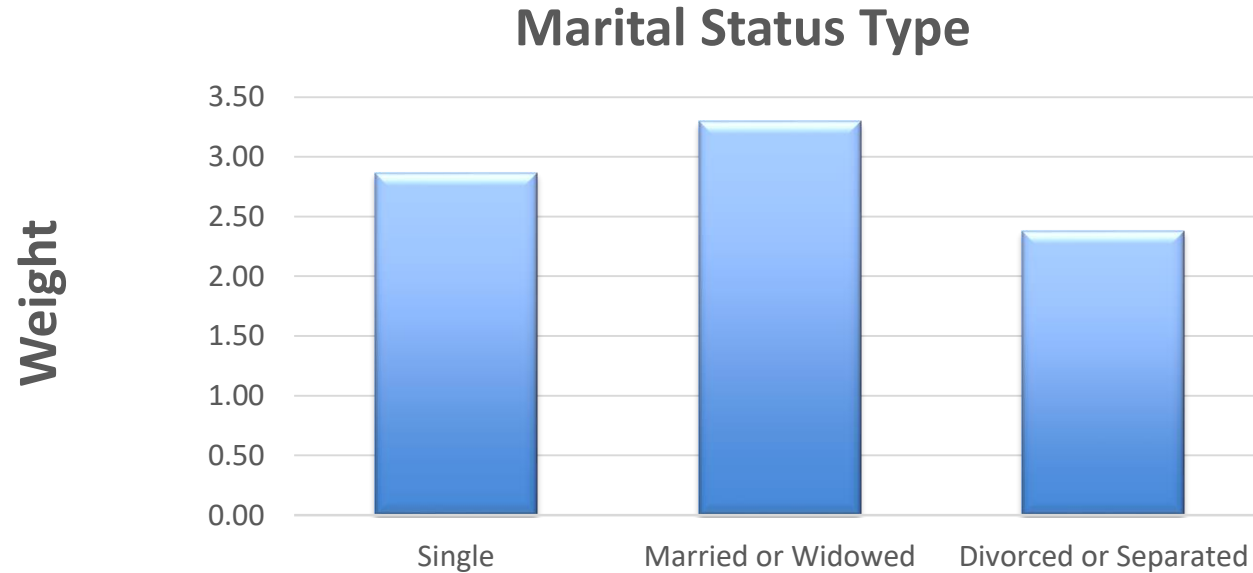
ENTITY SKEY	Extended Production Amount Sum	Age Range
10305	\$35	0-39
10305	\$175	40-49
10305	\$1,500	50-59
10305	\$111,510	60-69
10305	\$2,560	70-79
103814	\$0	0-39
103814	\$0	40-49
103814	\$160,815	50-59
103814	\$247,768	60-69
103814	\$43,846	70-79

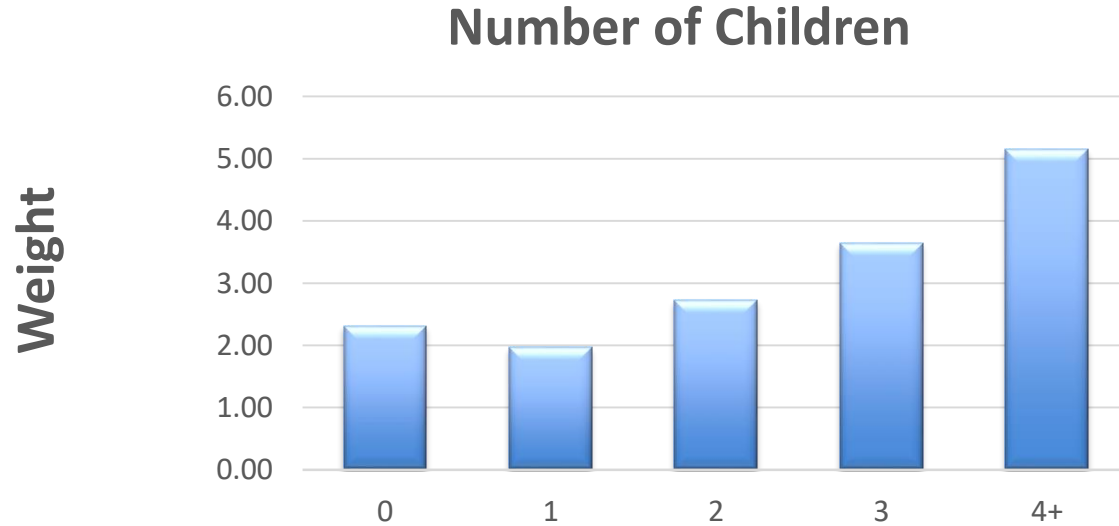
ENTITY SKEY	Extended Production Amount	Age Range
10305	\$25	0-39
10305	\$10	0-39
10305	\$50	40-49
10305	\$50	40-49
10305	\$25	40-49
10305	\$50	40-49
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.	.	.
.	.	.
10305	\$25	70-79
10305	\$25	70-79
10305	\$35	70-79
10305	\$30	70-79
10305	\$30	70-79
10305	\$100	70-79
10305	\$25	70-79
10305	\$30	70-79
10305	\$200	70-79
10305	\$100	70-79
10305	\$30	70-79
10305	\$30	70-79
10305	\$500	70-79
10305	\$25	70-79
10305	\$250	70-79
10305	\$100	70-79
10305	\$25	70-79
10305	\$1,000	70-79

Weight for Age

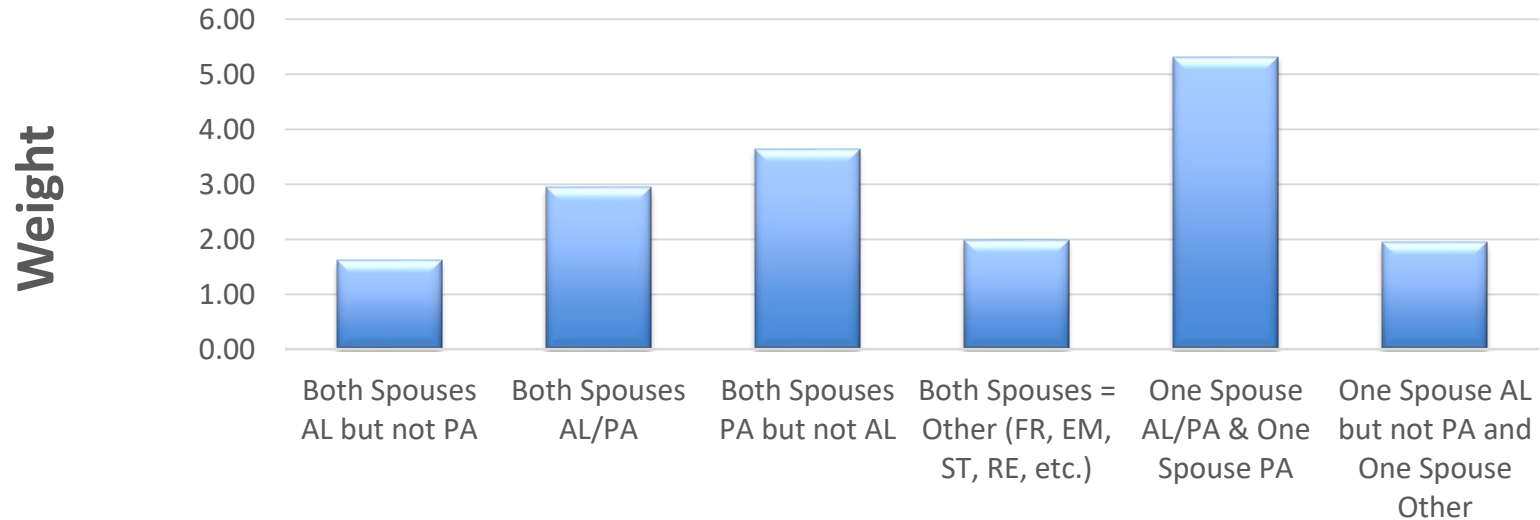
- Based on Lifetime Extended Production Amount per age range

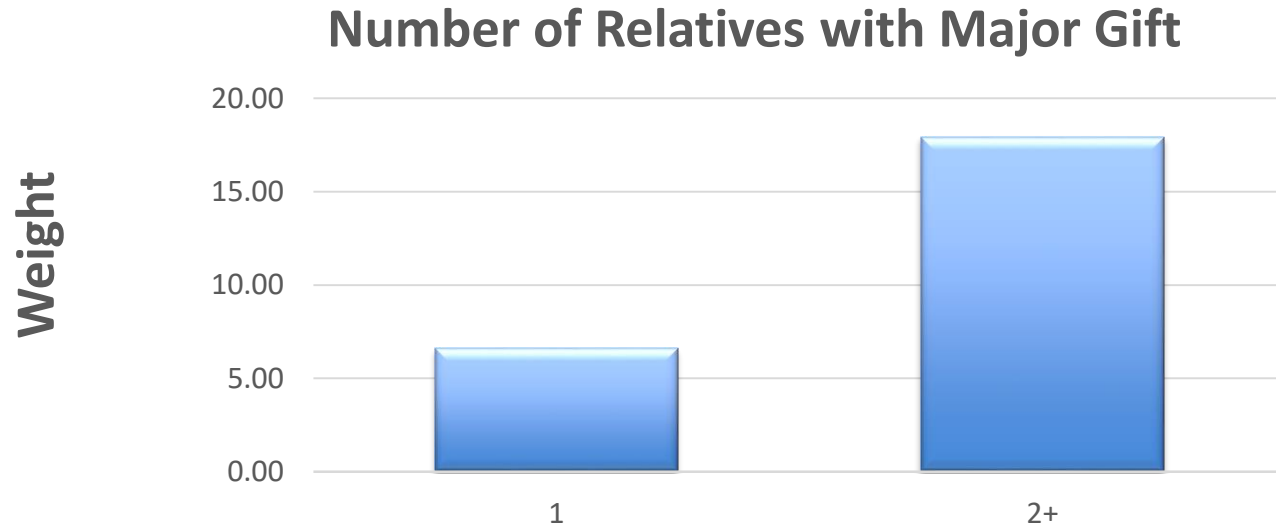
Age Range	Count	Extended Production Amount Sum	Extended Production Amount Mean	Weight
0-39	6,000	\$120,000,000	\$20,000	0.20
40-49	8,000	\$624,000,000	\$78,000	0.78
50-59	6,000	\$1,140,000,000	\$190,000	1.90
60-69	3,000	\$957,000,000	\$319,000	3.19
70-79	1,000	\$339,000,000	\$339,000	3.39
80-89	300	\$100,800,000	\$336,000	3.36
90+	20	\$4,120,000	\$206,000	2.06

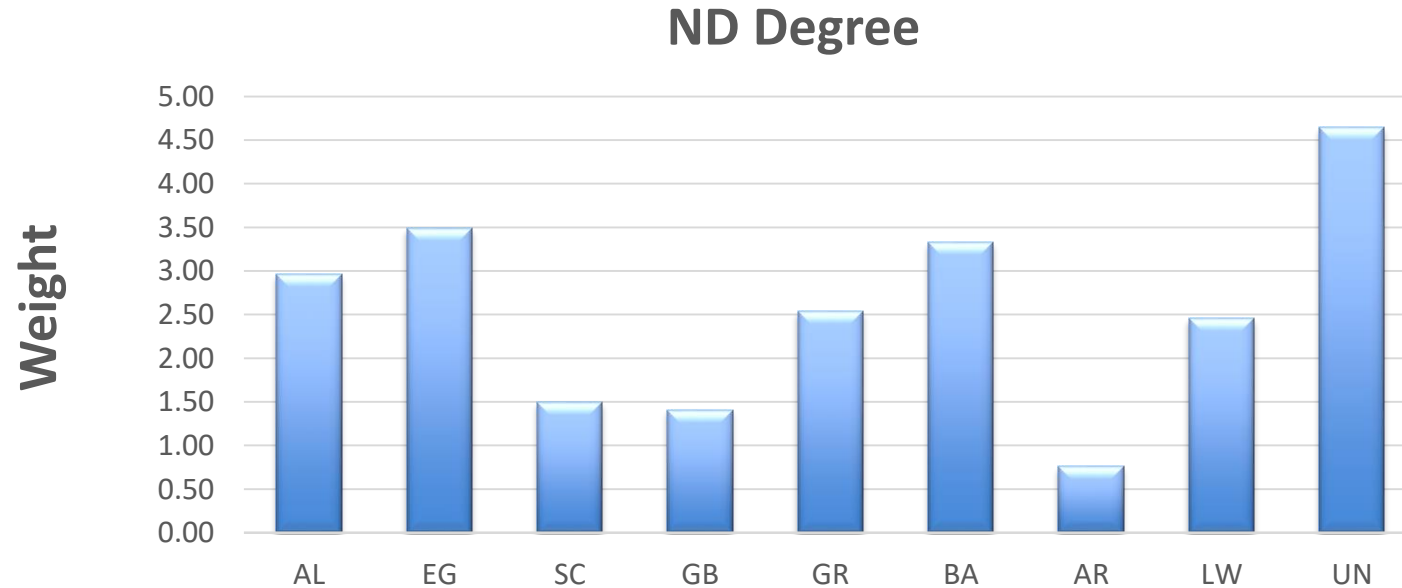


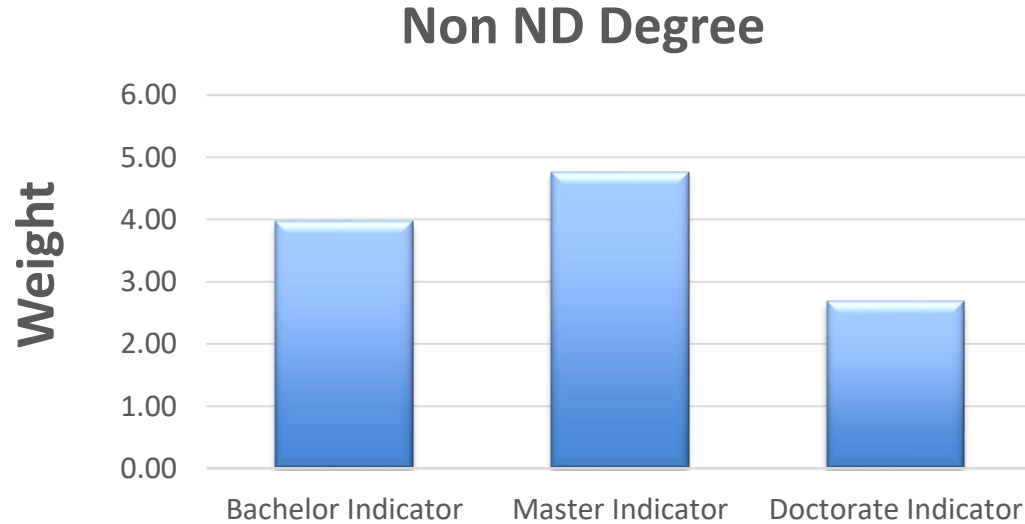


Record Type and Spouse Record Type

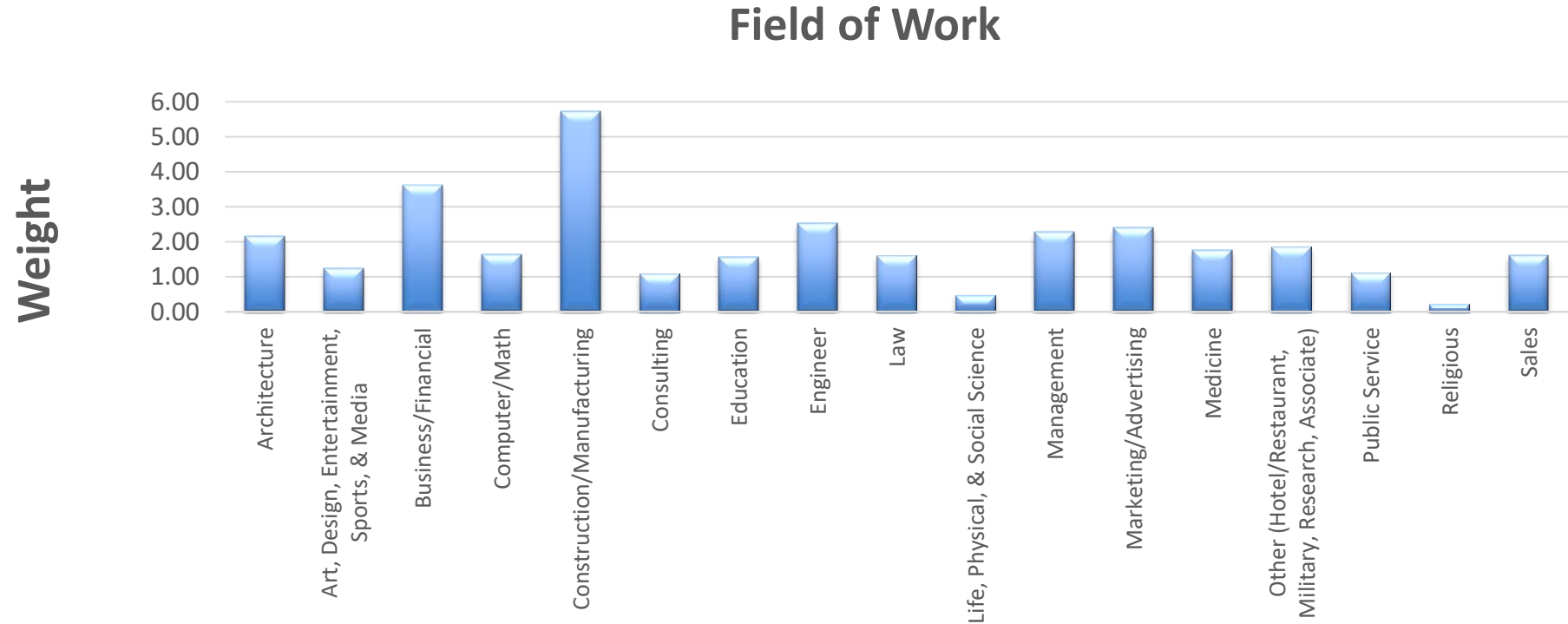


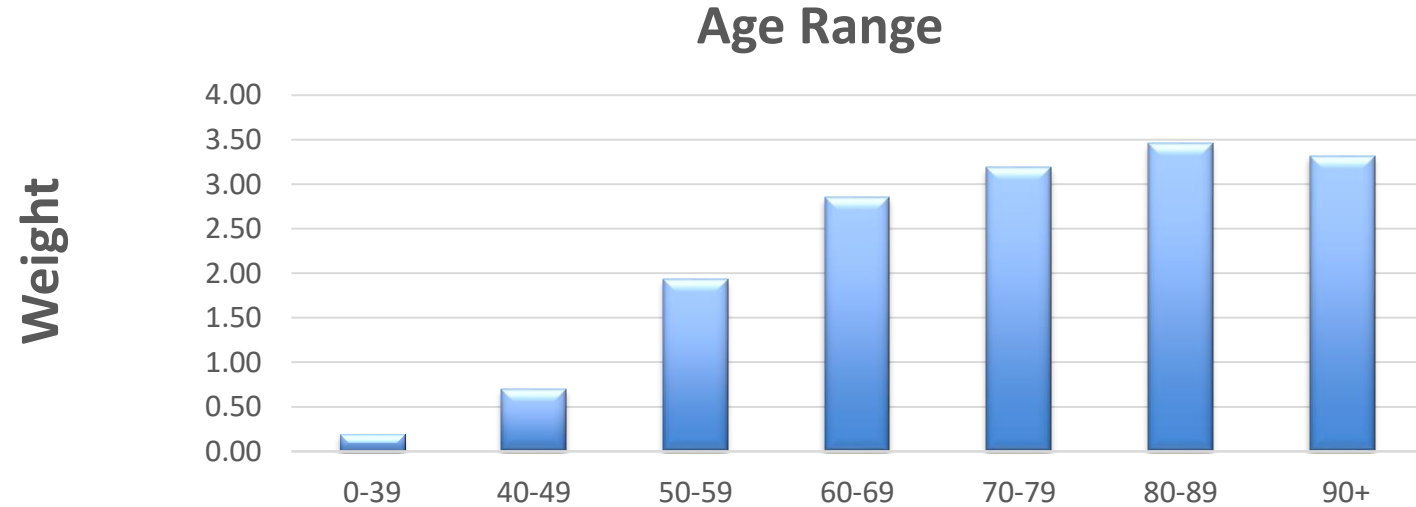




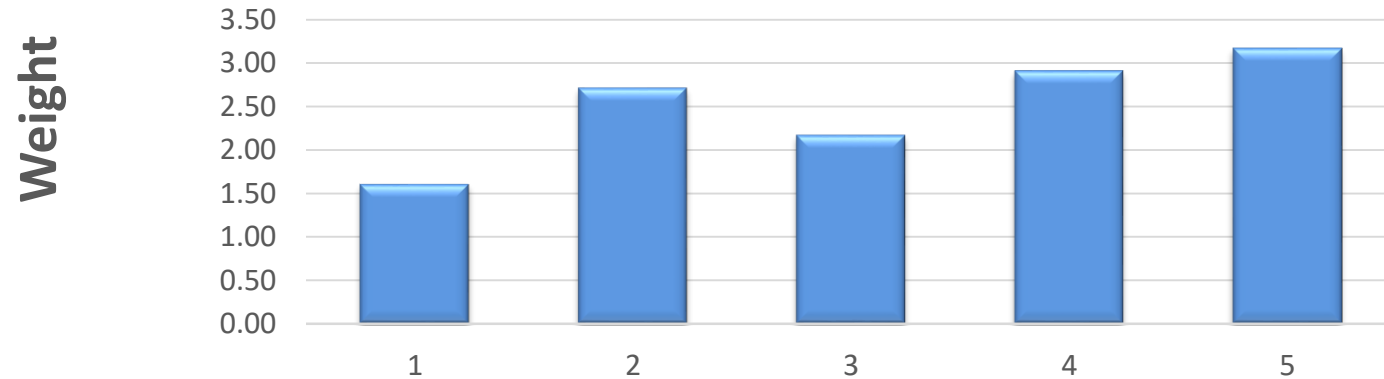


Weight





Number of Years within last 5 FYs with Extended Production or Cash

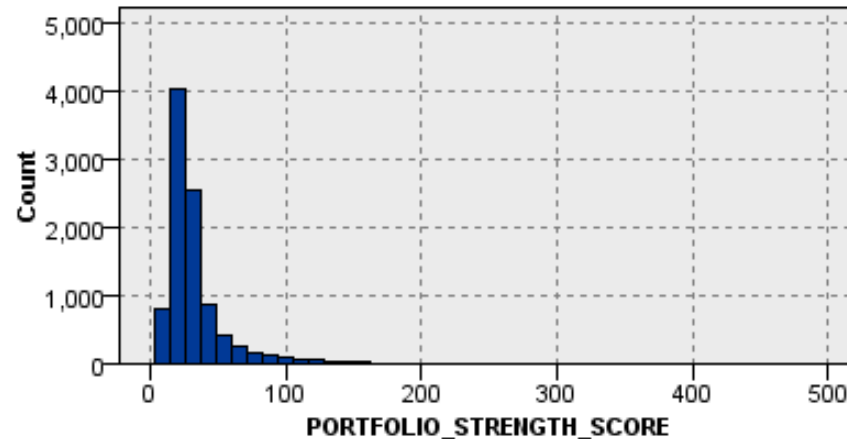


Portfolio Strength Score – Prospects Assigned

Score = Sum(Variable/Indicator * Weight)

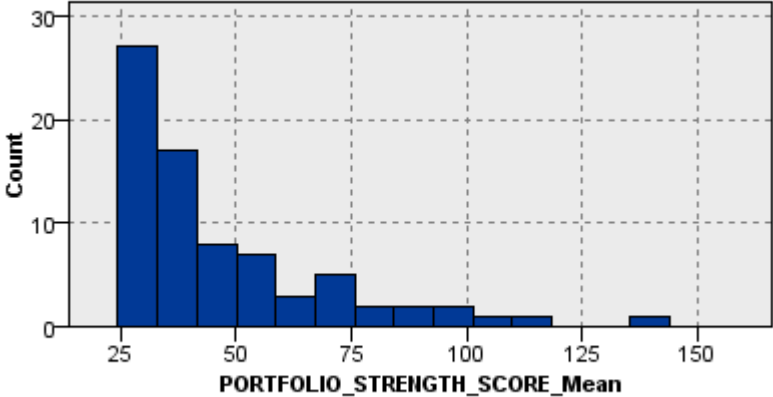
Score	Percentage	Count
0-49.99	85.32	8250
50-99.99	10.19	985
100-149.99	2.89	279
150-199.99	0.73	71
200+	0.88	85

Min	Max	Mean	Median
4.30	446.56	36.33	27.01



Portfolio Strength Score – Primary Solicitor

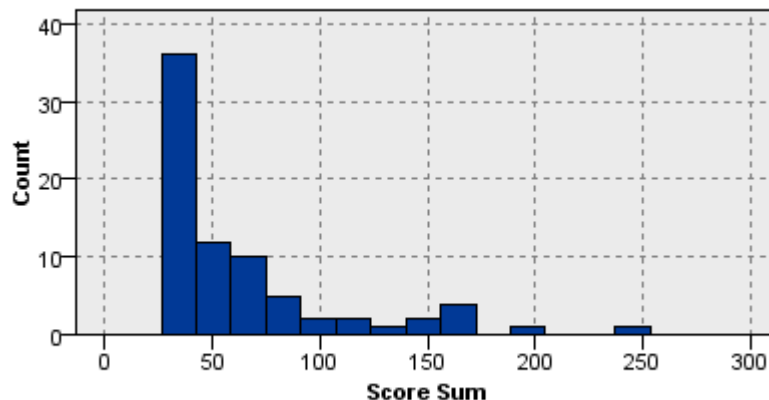
Average Portfolio Strength Score



Min	Max	Mean
24.34	144.13	46.68

Score with Capacity Rating

Score Sum = Average Portfolio Strength Score + Average Capacity Rating Score



Min	Max	Mean
26.19	253.48	64.53