

ezScreen™ – Donor & Prospect Screening

Made Easy by Donovan Management - Consultants in Philanthropy

What is ezScreen?

ezScreen is a customized database screening service that allows your organization to determine the wealth potential within your constituent database. **ezScreen** tells you who in your database has *the greatest financial capacity to give* and delivers:

- Donor and Prospect Wealth Qualifications
- Database Segmentation by Giving Capacity
- Cultivation Strategies for Annual, Capital, Major and Planned Giving Programs
- Campaign Rating and Evaluation Forms
- Custom-made Data Management Program
- User Friendly Final Data Report

What is our Approach?

In **Four ezSteps** our team of data screening and fundraising experts analyze your prospect and donor records and turn them into actionable data that will help you grow your development program.

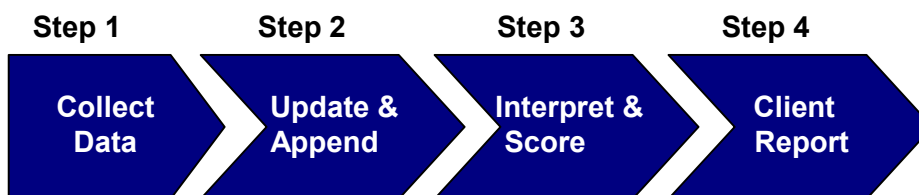
Step 1: You provide us your current donor and prospect records.

Step 2: Your data is run through the US Postal NCOA process (National Change of Address) and then appended with Age and Wealth Indicators:

- Household Income
- Home Market Value
- Income Producing Assets
- Net Worth

Step 3: Your records are score based on their Wealth Indicators (and giving history if provided).

Step 4: You receive a Client Report and data to begin your campaign preparations.



Upon delivery of your Client Report, [Donovan Management](#) provides telephone and email consultation to assist you in implementing your Capital/Major Gifts Program for a period of 30 days for no additional fee.

Need More Major Gift Prospects?

Enhance your prospect database with individuals of "High Income" in select zip codes.

Contact us at 407-321-0024 or dmimgt@aol.com

Information Provided on Donor/Prospect Record

Name & Current Address	Previous Address	Telephone (if requested)
Age of Primary Contact	List Source	Group (A, B, C, D, E)
Age of Secondary Contact	Total Score	Net Worth Score
Home Market Value Score	Household Income Score	Income Producing Assets Score

The **Rating Worksheet**, included with each record, allows staff and volunteers to note the following:

- Linkage to Organization: Strong/Somewhat Strong/Weak
- Committee Gift Rating
- Best Solicitor
- Naming Opportunity
- General Comments

How Age and Wealth Indicators Obtained

Net Worth – a modeled sum of household's assets such as -- autos, income, property, less liabilities -- loans, mortgages, credit card debt. A model is used to assign a household to a net worth dollar range based on a combination of household (assessor home value, number of children, age of oldest adult female in HH, estimated HH income, age of HH head) and area level (average home value in Census neighborhood area, percent of HH's with children in Census neighborhood area, percent females 55-64 of all females in Census neighborhood area, region of country - northeast, south, midwest, west) characteristics.

Income Producing Assets – a modeled value of a household's ownership of liquid assets (bank deposits, stocks, bonds, mutual funds, and other investments). A model is used to assign a household to an Income Producing Asset dollar range based on a combination of household (assessor home value, number of children, age of oldest adult female in HH, estimated HH income, age of HH head) and area level (average home value in Census neighborhood area, percent of HH's with children in Census neighborhood area, percent females 55-64 of all females in Census neighborhood area, region of country - northeast, south, midwest, west) characteristics.

Household Income - self reported and modeled self-reported income plus income-related data (HH age, occupation, home ownership, family structure, car purchase history, types of vehicles owned and their market value, credit rating of trade lines and credit cards, median home value of neighborhood, median income of neighborhood, number of credit cards) from several data sources are used to estimate the income group for households which require it. With that data, an analysis is produced which determines the probability of any household belonging to one particular income range. Households are then assigned to the range for which they have the highest estimated probability.

Home Market Value - This is computed using the assessed value of a home as the base value. From there, a model is applied, based on the geographic area, to calculate the sale value of the home. Some areas of the country may multiply the assessed value by 1.5, whereas others may find their market value to be closer to the assessed value. The model is validated by using actual home sales.

Age - Age data is compiled from driver's license, voter registration, and consumer questionnaires. The age of prospect and second person in household, within a two-year range, is also added to the matched records (when available) from the national database. *Note: Age is important in terms of an outright or planned gift as age determines if the prospect is more likely to give from income or assets.*

ezScreen works! Clients have discovered that:

- **A better ratio of prospects to donors to meet gift table requirements**
- **The Group listings speed up the volunteer prospect rating process**
- **Lead gift donors are easily identified**
- **It's easy to implement a prospect cultivation program**
- **Prospects for a donor club program are identified**
- **There is gold to be mined in the prospect database**

Experienced Consultants in Philanthropy

Donovan Management, Central Florida's first and most experienced consulting firm, has assisted over 200 clients engaged in Philanthropy in Florida and the Caribbean and elsewhere. In the last twenty years the firm has provided services ranging from capital campaign preparation and management to prospect research and major gift training. Since 2002, the beginning of our **ezScreen Donor and Prospect Profiling Service**, the firm has researched over 300,000 prospect/donor records for the following clients:

American Red Cross Chapters of Florida
Cardinal Glennon Children's Hospital, St. Louis
Seminole Community College, Lake Mary
Hospice of the Treasure Coast, Fort Pierce
Lower Cape Development Corporation, Cape Cod
Guadalupe Center of Immokalee, Florida

Bethune-Cookman College, Daytona Beach
Jackson Memorial Hospital Foundation, Miami
Naples Community Hospital
Cape Symphony Orchestra, Cape Cod
Health Central Foundation, Ocoee
Naples Botanical Gardens

Campaign Starter Kit

Once you receive the **Final Donor/Prospect Research Report** from **Donovan Management**, you have the first and most important tool in your **Campaign Starter Kit**. Additional start-up services that Donovan Management can provide for your capital or major gifts campaign include:

Internal Campaign Readiness -- an analysis of your internal resources. Are they sufficient to undertake a major gifts or capital campaign? We can make the case for you to get the resources needed.

Project Cash Flow Pro Forma --a cash analysis and overlay of the financial implications of a capital campaign construction project during the operations of your organization. A great tool when submitting foundation applications to demonstrate a financial snap shot in time.

Case Statement Research and Writing --a case prepared from the donor's point of view as to why your organization is *worthy* of major gift support. Donovan Management's case writing specialist answers four important questions of a compelling case.

Communication Plan --a written plan and multi-year timeline of how and to whom your organization should communicate your case for support.

Pre-Campaign Feasibility Study --using your case, we will "test" the receptivity of it among those who have the greatest ability to positively affect the outcome of your campaign by interviewing dozens of prospects, donors, clients, customers, vendors and friends of your organization throughout the community.

Campaign Plan -- a multi-year comprehensive and detailed plan by month of the strategic steps that must be taken to have a successful campaign. Who does what and by when?

Staff Recruitment -- a service that identifies qualified candidates to "staff-up" for your campaign. Using our extensive contacts through several professional associations and client list, we can get you the talent you need to further enhance your campaign team.

Campaign Counsel and Management -- depending on your needs and budget, we can provide periodic fund raising counsel or on-site campaign management for a mutually agreed upon time period to augment your staffing and to provide the *outside voice of experienced counsel* to leadership and board volunteers.

For more information contact:

James A. Donovan, President/CEO

Donovan Management, Inc.

P.O. Box 471438, Lake Monroe, FL 32747-1438

Email: dmimgt@aol.com Office: 407-321-0024 Fax: 407-321-0609

Website: www.donovanmanagement.com

