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Spotlight Feature

The Morton Arboretum 5



WSPN Mission

To offer support to development professionals and advance philanthropy.

Uncovering Hidden Wealth

Donor Analytics

By David Schreier

We've all heard the expression "Fundraising is an art and a science," but how often do development professionals actually employ the "science" part? Donor analytics (sometimes referred to as "data mining") is one method that utilizes a powerful, fact-based approach to fundraising.

Essentially, the method involves developing an analytical framework that integrates two sets of data — inclination to give and capacity to give — in such a way that donor prospects can be prioritized effectively and meaningfully for various types of cultivation activities.

Because a key element in donor cultivation is fostering interaction between prospects and an organization, donor analytics can help nonprofits determine the *relative value* of each prospect in terms of the appropriate personal attention warranted by board and staff.

Given the extra demands on development professionals these days, it is important to find those efficiencies that make personal time in the field optimally valuable. I would argue that donor analytics research is an essential need for today's resource development program.

What can donor analytics answer?

- What is the estimated giving capacity of my donors?
- What is the estimated inclination (or likelihood) of my donors to make a major gift?
- Does the combined estimated gift capacity and commitment of my donors correspond to the fundraising goals set by my organization?
- What is the demographic profile of my major gift prospects and how can I use that information to focus cultivation activity?
- What is donor analytics?

"Analytics" is a broad term that refers to the use of data, statistical and quantitative analysis and predictive models to drive decisions and actions. Research has shown that decisions based upon analytics are *more likely to be correct* than those based on intuition alone.

Historically, nonprofits have not made extensive use of donor analytics, but today many are recognizing the added value and practical benefits. I teach nonprofit management courses in the MBA program at Concordia University and my graduate students often utilize analytics at their jobs, e.g., selling real estate, developing a corporate marketing strategy and running a political campaign. Now they are learning how to apply the same thinking to raise more money for the nonprofits for which they serve.

Where does the information come from?

It comes from two sources: 1) internally, from your house data files; and 2) externally, from a meta-database provider that accesses the consumer data marketplace through a vast array of sources and compiles findings using complex logarithmic modeling.

A donor's *capacity* to give is developed from these public consumer information sources, whereas a donor's *inclination* to give is drawn from historical giving patterns to



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WSPN Mission

To offer support to development professionals and advance philanthropy.

WSPN Core Services . . .

education, networking, and advocacy

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We invite your membership:

Dues to join West Suburban Philanthropic Network are \$40 per year. Make checks payable to West Suburban Philanthropic Network and mail to:

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(Continued on page 3)

President's Message

Dear WSPN members:

I think every organization or group starts off the year with plans to renew the vision, tackle key issues, and achieve a set of goals. It's a new year for WSPN and with summer behind us, it becomes a little easier to jump back into "indoor" meetings and get our heads back into the game from the vacation mode.

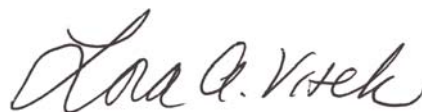
At this time, I invite and encourage you to share with us the areas you plan to focus on, personally in your career or professionally for your organization that might be within WSPN's mission: To offer support to development professionals and advance philanthropy. How can we help you, our members, in these areas?

Rather than completing a survey, please send suggestions of program topics, ideas for mentoring activities, opportunities for engagement/networking, or any comments to any of our board members listed on the side panel. Please also see our program schedule on page 12 to take advantage of the many already planned opportunities in professional development.

Your membership in WSPN is important to us. As volunteers we strive to make education, networking and career enhancement opportunities available to you. We ask you, as members, to help in making this a valuable tool and resource to the suburban nonprofit community and to the profession.

Looking forward to a great year!

Sincerely,



Lora Vitek, MBA, MMNA



2011-12 Nominations/Slate of Officers

The WSPN Nominating Committee is pleased to announce the nominations for the 2011-2012 slate of officers:

Lora Vitek, President

Chrissie Howorth, Vice President

Greg Weider, Treasurer

Lori Richardson, Secretary

Continuing as immediate past president is Brad Warren.

Philanthropy Center News

Start Your Nonprofit Career Search with Us

By Christine Kickels, Librarian
The Philanthropy Center,
College of DuPage
kickels@cod.edu

College of DuPage Library houses the only philanthropy collection in the western suburbs. However, we have another unique collection specific to career and job sources found in the upper level of the library. The **College and Career Information Center (CCIC)** should be your first stop if you are in the midst of a job search, need to update your resume or are considering using social networking in your career expansion.

Here you'll find a large collection of books on writing resumes and cover letters, preparing for interviews, and researching professions and prospective employers. We also offer a number of online databases that you can access with a COD library card. Our reference staff would be happy to show you how easy it is to use these databases.

Want to explore a new career? Consider **DISCOVER** to take an inventory of your career interests, abilities and values.

Looking to develop a list of potential new employers? **Reference USA** provides lists of businesses and key staff. All you need for conducting a search is a defined area and business type.

The **Foundation Directory** can help you locate names, titles and salaries for individuals or positions. Search by name of the grantmaker and click on the link for the most recent IRS Form 990 (filed by tax-exempt organizations and nonprofits).

We also have books specific to the nonprofit sector. All titles are available for a three-week checkout period with your COD library card. Selected titles include:

- **Fundraising as a Career**, ©2010.
- **Career Launcher: Nonprofit Organizations**, ©2011.
- **Jobs that Matter**, ©2010.
- **The Idealist Guide to Nonprofit Careers for First-Time Job Seekers**, ©2008.
- **National Directory of Nonprofit Organizations**, ©2010.
- **Vault Career Guide to Fundraising and Philanthropy**, ©2008.
- **Find a Job through Social Networking**, ©2011.
- **Using LinkedIn**, ©2010.

Through our partnership with the **Donors Forum**, we also maintain an online list of Illinois job openings in foundations and nonprofits. See this list as well as other sites for job searches at <http://www.cod.edu/library/Philanthropy/jobs.htm>.

All are welcome in the COD Library at any time and anyone who works or lives in our district is eligible for a COD library card. If I can help you become more familiar with our resources for nonprofits, please don't hesitate to contact me at (630) 942-2313. ●



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Editor's Note

Dear VIEWPOINT readers:

I am thrilled to be taking over ViewPoint especially since I have enjoyed the newsletter for years. I want to extend a big thank you to Val Ensalcado for her 16 years of service as editor/copywriter. I also want to thank her for her help in guiding me through the transition.

Special thanks also goes to Frank Hudetz and Amy MacTavish of **Elk Grove Graphics** for their consultation, design work and printing of this issue.

I look so forward to working with our readers. Remember, ViewPoint is your newsletter, so please send topic ideas, comments and suggestions. Should you like to submit an article or feature your organization in Spotlight, contact me at jillm@elmhurst.edu.

Sincerely,

Jill McWilliams, editor

Advertising in VIEWPOINT

A limited number of business-card sized advertising spaces are available in VIEWPOINT.

\$190 for four issues,
renewable in January only,

\$ 60 for a single ad,

\$110 for two inclusions, and

\$160 for three ads in a single
calendar year.

To place an ad in VIEWPOINT: mail or email (jillm@elmhurst.edu) a camera-ready business-card sized ad. Send a check made payable to **West Suburban Philanthropic Network** to: Jill McWilliams, ViewPoint Editor, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126

Please consider our advertisers when seeking services. Their ad fees help with the production costs of our award-winning publication.

Outstanding Volunteers Honored at the WSPN Awards Luncheon in May 2011

A highlight of our annual WSPN luncheon is the celebration of Outstanding Volunteers who shine in our organizations. While not an exhaustive list by any stretch of the imagination, we thank them:

For using their muscles, their minds and their invincible spirit to live our mission.

For investing tireless hours in silent auctions, galas, garden luncheons and festivals.

For bringing creativity, stability and continuity to our boards.

For being the ambassadors that attract new donors, new board members and sponsors to our organizations.

For sharing their wealth of technical knowledge with staff and clients.

For being a researcher and a resource and a master of ceremonies as needed.

For serving as a mentor and an advisor, keeping people connected and feeling safe.

For welcoming those visiting our community and spreading warmth, generosity and hospitality.



First row from left to right: David Hinds, Claire McElroy, Judi Jacobs, Patricia DeAnda, Joyce Tumea, Gene Malloy. Second row: Ernest Todd, Janet Pleimling, Annette Dunfee, Doug Eden, Annette Bonfield, Sophia Abenante, Adelena Marshall, Walter Rossow. Back row: Ralph Kuhn, Carol Tritschler, Diane Eden, Paul Pyrcik, Jr., Paul Feith, John Kokum, Jim McSherry.

We pay tribute to all of our volunteers, who serve as our cheerleaders, our champions, and our advocates.

They go about their work quietly and humbly but filled with joy and compassion. How wonderful to have an opportunity to honor them publicly and join in celebrating their vital contributions to our community! ●

Spotlight

Featuring a WSPN Member Organization

Trees: Beautiful, functional and vital to the community



Trees provide oxygen to breathe, filter pollutants from our air and water, and serve as an important source of food, medicine and shelter. Trees are an essential part of a healthy community.

Established in 1922 by Mr. Joy Morton, founder of the Morton Salt Company and son of J. Sterling Morton, who founded Arbor Day, the mission of The Morton Arboretum is to collect and study trees, shrubs, and other plants from around the world, to display them across naturally beautiful landscapes for people to study and enjoy, and to learn how to grow them in ways that enhance our environment. The Arboretum's goal is to encourage the planting and conservation of trees and other plants for a greener, healthier and more beautiful world.

Unique among Chicago's visitor destinations, The Morton Arboretum is a world-renowned leader in tree science and education, working to save and plant trees. Arboretum scientists conduct research on tree health, emphasizing roots and soils, tree improvement, plant performance under urban stresses, woodland conservation, and protection of rare and endangered species. Studies conducted in Arboretum labs and research plots offer a first line of defense for urban trees against the effects of pests, diseases and climatic conditions.

Another way the Arboretum helps communities become greener, healthier and more beautiful is through the Community Trees Program, which serves 270 metropolitan communities and provides expertise and advocacy to Illinois communities by assessing green resources and developing tree management plans, reviewing or developing ordinances and guidelines to protect trees, and emphasizing the value trees provide. In 2010, the Arboretum conducted a Tree Census in the seven-county Chicago region. Results will assess the scope, character, and condition of the urban forest; set realistic future goals to increase tree canopy; and measure and quantify the ecosystem services derived from urban forests.

The Morton Arboretum also serves as a one-of-a-kind living classroom, immersing adults and children in nature and providing lifelong lessons and enjoyment. Formally established in 1940, the education program at The Morton Arboretum was among the first such programs for U.S. arboreta, setting a national standard for its range, reach and quality. Their highly regarded school science programs, summer science camps and Children's Garden activities help families, teachers and students learn through science-based nature discovery.



As urbanization increases and green space diminishes, informal outdoor playtime is vanishing from the childhood experience. Since opening in September 2005, The Children's Garden at The Morton Arboretum has transformed how more than a million visitors explore and discover nature by offering accessible, safe, and fun unstructured outdoor play experiences. The Garden includes 10 themed areas, each with engaging and interactive activities. Splashing through secret streams, climbing colossal acorns, and sliding down giant tree roots encourage physical fitness and health, as well as, social and cognitive development.

The Arboretum's living collections make plants accessible and exciting. Displayed across 1,700 acres and designed for both enjoyment and educational purposes, the vast collections represent one of the most comprehensive collections of woody plants in North America. Sixteen miles of trails and nine miles of paved roads wind through woodland, wetland, and prairie habitats, offering more than 830,000 annual visitors an opportunity to experience the year-round wonder and beauty of nature.

As an independent, nonprofit institution, The Morton Arboretum serves as a vital community resource for nature education, outdoor recreation, artistic expression, and scientific study. To learn more and find ways you can become involved, visit their website at www.mortonarb.org. ●

Uncovering Hidden Wealth (Continued from page 1)

Donor Analytics

By David Schreier

your organization. By pairing both of these types of information together *in the proper manner* you can establish a *predictive model of future giving*.

Capacity and inclination grid

Combining the estimated giving capacity and level of commitment for each donor results in an assigned rating. For example, a donor with a high giving capacity (say more than \$75,000) and a consistent giving history over the last five years might have a rating of A2 and would be considered a “best” prospect. Compare this to a donor with a low giving capacity who has only ever made one gift, who might be given a rating of G9 and may be considered a weak prospect.

		CAPACITY LEVEL		
		High 1,2,3	Medium 4,5,6	Low 7,8,9
INCLINATION LEVEL	High A,B,C	Best Prospects	Good Prospects	Weakest Prospects
	Medium D,E,F	Good Prospects		
	Low G,H,I	Weakest Prospects		Least likely to give or have money

Generally, we have found that it is easier for clients to assign *number values for capacity* and *letter values for inclination*. This not only facilitates sorting and slicing the data, but greatly simplifies data interpretation.

Two distinct sets of data indicators

Through the process of analyzing donor giving histories with personal wealth indicators, organizations can better decide whom to target, when, and for what size gift. Here are just a few of the indicators a donor analytics process might evaluate.

Gift capacity indicators:

- household income level
- age of household head
- home value
- estimated net worth
- giving to other organizations

Gift inclination indicators:

- size of largest gift
- frequency of gifts
- average gift size
- timing of the last gift
- cumulative historical giving
- involvement on board/committees

Practical ways to apply the analyzed data

- Capital campaign goals can be accurately set and structured based on newly “discovered” wealth in combination with affinity with the organization;
- Planned giving announcements and mailings can be targeted to age-appropriate individuals;
- Annual fund results can be increased by developing an accurate formula for increased gift requests;
- Fundraiser and friend-raising events can be targeted by age, geography, and area(s) of funding interest;
- Board, committee members and staff can gain valuable insight in developing cultivation strategies for individuals during prospect rating and assessment meetings;
- Financial forecasting and goal setting can be enhanced with stronger knowledge of donor capabilities and inclination (often donors are “under-asked”).

Importance of using experts

The key to conducting a donor analytics assessment is having the expertise to know what information to gather and how to properly integrate the two sets of data (each with their own multiple data subsets). If you are going to attempt to do this in-house, be sure you have someone with a solid understanding of statistical software, like SPSS, and who has a solid end-user understanding of resource development methods and objectives.

A word to the wise: Some organizations try to save money and attempt to do their own donor analytics data integration and analysis. Notice I used the word “attempt,” as too often the projects falter midway and outside experts eventually get called in to assist. The old adage about being a penny wise and a pound foolish seems to apply here.

By using donor analytics, your organization can learn to raise more money, more efficiently. Good luck!

David Schreier
Associates
LLC



David Schreier is president of David Schreier Associates, LLC, a Chicago-based consulting firm that offers donor analytics and other capacity building services to nonprofit, mission-driven organizations. He is an adjunct professor in the College of Business at Concordia University Chicago. David@davidschreierassociates.com. ●

Resource Round-Up



Jason Saul

Opening Keynote Speaker

Stedman Graham

Closing Keynote Speaker

AFP Chicago's Midwest Conference on Philanthropy
is the region's largest one-day event for development professionals.

FOR MORE INFORMATION: Please contact the AFP Chicago office at
(630) 416-1166, conferenceinfo@afpchicago.org or online at www.afpchicago.org.

2011 Independent Sector Annual Conference *R-EVOLUTIONARY TIMES*

Chicago, October 30 – November 1
http://www.independentsector.org/2011_conference

The IS conference is where leaders go to build strong networks that help them achieve their mission. Join 1,000 of the brightest minds from nonprofits, foundations, and corporate giving programs for high impact networking and programming that challenges you to think differently about the issues we face and how we move forward in these ouR-Evolutionary Times.

Become a Member

*Check out our website at www.wspnonline.org
to learn more about WSPN.*

You can access job opportunities, mentoring and scholarship information,
become a member and learn about upcoming programs.

Also, join WSPN on LinkedIn to extend your networking possibilities.

ATTENTION MEMBERS: *Have you changed jobs?*
Please log into the website to update your contact information.

Movers and Shakers

In January, Susan Rudigier Mchabcheb assumed a new role as Assistant Vice President, Individual and Major Gifts at Easter Seals Headquarters in Chicago. Mchabcheb's responsibilities include managing the individual and major gifts fundraising program for Easter Seals headquarters including building the donor base, developing the annual fund and major gift fundraising, and integration with planned giving initiatives. In addition, Mchabcheb collaborates with Easter Seals 76 affiliates to advance donor development opportunities nationwide. Prior to this new position, Mchabcheb was Vice President of Development at Easter Seals DuPage and the Fox Valley Region.

In August, Janelle Barcelona joined DuPage PADS as the Director of Development. Janelle brings more than 30 years of nonprofit experience. In her role, she is responsible for developing and implementing the development strategy for DuPage PADS in support of its current and long-term strategic objectives. She will direct the planning and assessment of all development efforts, fundraising, marketing and communication activity of the agency, including special events, annual appeals, major gift program, grants, donations, foundation and corporate fundraising. She will also strive to maintain strong community relations and establish a presence in the community to increase the organization's visibility.

NOTE: Movers and Shakers is a member-driven feature. We'd like to hear about your job changes, promotions, professional development, awards, honors, special anniversaries, fundraising successes — especially capital campaigns — and any other news of interest (marriages and babies, too!). Please email your news to Jill McWilliams, VIEWPOINT editor, at jillm@elmhurst.edu. ●

2011 WSPN Philanthropic Awards Luncheon

About 250 people attended the ninth annual luncheon in May to honor community members receiving philanthropy awards. Meet our honorees and some of the VIPs who attended the luncheon.



Courtney Simek, WSPN Awards luncheon chair, and Susan Mchabcheb



WSPN Distinguished Service Award
Lora Vitek and honoree Brad Warren



Ken Bartels serving as master of ceremonies



Professional Grant Maker of the Year
Lora Vitek; honoree Meredith Dykstra Hilt, executive director of the Tellabs Foundation and senior manager of corporate social responsibility at Tellabs, Inc.; and Carol Gavin



Nonprofit Volunteer of the Year
Rachel Neville, Carol Graeff, Fran Channon, honoree Mary Jo Sheehy of Fox Valley Volunteer Hospice, and Mark Alleman



Nonprofit Executive of the Year
David Hinds; honoree Jane Hodgkinson, then executive director of Western DuPage Special Recreation Association; and Jim Decker



Corporate Philanthropic Award
Kathi Wagner; honoree Nancy LaBrecht, marketing and community relations specialist of West Suburban Whole Foods covering Hinsdale, Naperville, Wheaton and Willowbrook; and Lora Vitek



Humanitarian of the Year

Edward A. Coleman, honoree Bernard J. Kleina of HOPE Fair Housing Center, and Jeff Taren



Philanthropic Leadership Award

Lora Vitek, honoree Denise Izatt of Denise A. Izatt & Associates, Lucia West Jones, and Connie Kobitter



Greg Weider, Cheryl Bancroft and Dr. Sandra Drewes



Theresa Nihill, awards luncheon attendee, Judy Jacobs, and Pat Mathis



Outstanding volunteers: Adelenia Marshall, Sophia Abenante and Ernest Todd



Tom Kallay, Ann Spehar and Margi Schiemann

Blasts From the Past

Major Gifts . . . An Interactive Discussion



Ken Bartels, Susan King and Joe Skvara presented at WSPN's June program.

On June 16, Ken Bartels, Principal, Ken Bartels Consulting; Susan King, Executive Director, Hinsdale Hospital Foundation; and Joe Skvara, President, JS Consulting, presented to a crowd of 40 at Naper Settlement in Naperville. It was an informal discussion with some advice, some stories and some time for questions.

Securing major gifts takes both planning and mindset, Ken Bartels said. You must plan and devote resources to major gifts as a part of your overall advancement effort, but you must also commit your best thinking and dedication as well. Unlike some types of fundraising, relationships most often drive major gifts and relationships require time, persistence, creativity and the ability to execute strategies both short and long term. Major gifts, however, are worth the involvement that they require. They should be a priority at all times.

What is a major gift?

- For some organizations it might be \$100; for other nonprofits, it might start at \$50,000 or more.
- A step-by-step plan is necessary for the proper implementation of individual major gift strategies for identification, research, cultivation and solicitation.
- The gift may be “major” not only in terms of size but also in terms of impact for your organization.
- At its highest point, a major gift may be transformational in its impact.

Major gift cultivation

- Make donors feel like insiders.
- Ask for advice.
- Find out what is important to them.
- If possible, bring them to your organization.
- Look for links to your mission and values.

Giving circles

- Purpose: To thank, recognize, steward and inform donors about the impact of their gift.
- Create a culture of philanthropy.
- Allow a natural way for donors at all levels to meet each other and share their mutual interest.

An organization's board, staff and volunteers all need to be able to “spot” potential major givers. Everyone knows someone who could make a significant difference for their organization. Spend the time it takes to learn how to find the clues to finding supportive friends for your endeavors.

Touchdown . . . Speed Networking!



Speed Networkers had two minutes each to share their information before the whistle blew and they had to move on to the next contact.

On June 30, the second WSPN Speed Networking event at Mayslake Peabody Estate scored big points for value. The whistle blew for movers to move and connect with shakers. Guests enjoyed wine,

(Continued on page 11)

(Continued from page 10)

cheese and tantalizing appetizers prepared by Jeff Can Cook Catering while they mingled before getting down to the speed networking.

The results:

- Seven new members. A warm welcome to:
Sarah Altmeyer
Robert Baruch
Mimi Stojasavljevic
John Strasky
David Terrill
Phyllis Molenda
Tim Traynor
- One peer mentor protégé application
- One peer mentor application
- One renewed membership



Chrissie Howorth and Amy Van Polen check in the Speed Networking participants.

Guest comments:

"Event was excellent. LOVED it. Met lots of people and got to ask direct questions without all the small talk."

"Great event and amazing networking opportunity! Thanks!"

"Met a lot of great people, came with an associate so one of us was a mover and the other a shaker, we were able to connect with everyone — highly recommend it."

Don't miss the next Speed Networking event which is planned for December and will feature a new whistle! ●

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Save These Dates . . .

West Suburban Philanthropic Network 2011 Programs

Please save these dates and join us for the exciting events we have planned for the rest of 2011!



WSPN programs are free for WSPN members and \$25 for non-members. Programs are usually held on the third Thursday of each month. Registration and refreshments begin at 8 a.m. and the program begins at 8:30 a.m.

Wednesday, Oct. 26 **Topic:** WSPN/DAVA Collaborative half-day program. Special date and time!
Training Leadership Volunteers to Ask for Donations

Time: Registration at 9:30 a.m., program 10 a.m. to 12 p.m.
(Must be a member of either organization to participate.)

Location: Giant Steps, 2500 Cabot Lane, Lisle

Thursday, Nov. 17 **Topic:** Developing your Personal Brand

Speaker: Mark James, Mark James and Associates

Location: Forest Preserve District of DuPage County,
3S580 Naperville Road, Wheaton

Thursday, Jan. 19 **Topic:** Creating Actionable Strategies

Speaker: Sherrin Ross Ingram, CEO, International Center for Strategic Planning

Location: Salvation Army, 1S415 Summit Ave., Oakbrook Terrace

Save these dates, too!

More details to come, but future programs are scheduled for:

February 16 March 16 April 19
May 17 June 21



For more information or to register, visit www.wspnonline.org
or contact Elissa Fink at (630) 871-6400 or efink@dupageforest.org.

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