WealthEngine Guide

DonorPerfect Online

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Overview

Thank you for purchasing WealthEngine. This guide is designed to help you understand how to use WealthEngine and DonorPerfect Online together.

WealthEngine provides information to help your organization develop strategies for successful fundraising efforts. A complete evaluation is done by gathering and analyzing data from multiple data sources. With this service, you can screen your donor database using WealthEngine's sophisticated prospect research system. The rating data on matching donors can be copied into DonorPerfect Online where it can be used for targeting campaigns and solicitations. This data may be presented in several formats: the **FindWealth Online** website, Microsoft Access Manager Database and in a **WealthEngine Fields** area on the **Bio** tab of the Main Entry Screen in DonorPerfect Online.

When using **FindWealth Online**, the user may perform a search on a single individual/couple or organization; when utilizing FindWealth Screening Services hundreds or thousands of individuals/couples can be evaluated in a single screening.

All of the services described in the following pages enable development professionals to quickly find information about prospects in three broad subject areas:

- **Wealth** – identify markers of wealth including assets, income, business ownership and positions of influence.

- **Philanthropic Intent** – gather charitable giving to other nonprofits, nonprofit board positions, volunteer activities and foundation trustees.

- **Connections** – identify personal and organizational connections to donors and prospects.

Explanation of Services Offered

FindWealth Online

Perform a search on a single individual, a couple, or an organization via WealthEngine's web-based research tool by supplying a name and partial demographic information. You can access the most current data on valuable hard asset information like real estate, pension and income, as well as philanthropic and biographical data through a simple, advanced or organization search. All of the databases are scanned for the latest information then compiled for you to view immediate results.

> **Note:** Everyone who purchases the WealthEngine module is required to purchase a FindWealth Online subscription.

Simple Search

Search Reset

* **Report**
-Select Report-

* **Last Name**

First Name

Or

State
All States

Or

City

Or

Zip

Search Reset

Advanced Search

Only a name and address are required to perform an Advanced Search. The required fields are marked with an asteriks (*). Additional information may be entered in the Optional section below.

***First Name:**

Mid Name:

***Last Name:**

Address:

***City:**

***State:** Select From List

***Zip Code:**

Zip 4:

Search Reset

Organization Search

Organization

Search Reset

WealthConnect (Optional)

This option provides a WealthEngine lookup button directly from within DonorPerfect Online. This one-click access to FindWealth Online (subscription required) provides up-to-the-minute detailed wealth information and includes all rankings and ratings.

► **To access WealthConnect**

    1. From the Main Entry Screen, click on the **Access WealthEngine** link at the top of the page. The Accessing WealthEngine pop-up screen appears:

Accessing WealthEngine

Would you like to open the WealthConnect portal to view prospect information for this constituent or update this record with data from WealthEngine?

[Open WealthConnect]   [Update Current Record]   [Cancel]

2. Click the **Open WealthConnect** button.

FindWealth Screening Services

WealthEngine allow you to screen all or just a segment of your constituents using their extensive data services. Statistical models are used to calculate ratings and scoring for each matched record. Summary information will be imported back into your DonorPerfect Online database for further reporting and filtering. The result is clear, comprehensive information that you can take from desktop to donor meeting.

This service delivers over 42 defined fields of data which are imported directly into DonorPerfect Online as part of our value-added service. These fields appear in the **WealthEngine Fields** and **WealthEngine – Quality of Match Fields** sections of the **Bio** tab of the Main Entry Screen.

In addition, you will receive a Microsoft Access Database file containing more detailed information.

> Note: This screening service is not part of the FindWealth Online annual subscription. It is available for an additional cost. Contact your Client Account Manager for pricing at (800) 848-3279.

WealthEngine Fields

Field	Value	Field	Value
ID	-67014185	Giving Cap. Range	$1,000,000 - $4,999,999
P2G Score	1	P2G Score 2	0
Influence	Bottom 25%	Inclination	Top 25%
Accredited Investor	Y	Bequest	No
Annuity	0	Trust	0
MG Tot. Compensation	$0.00	D&B Company Value	$0.00
FEC Contribution	$0.00	Property Count	1
Annual Income	$2,238,609.60	Real Estate Value	$7,010,000.00
WealthID Sales, Hold	$0.00	Defined Pension Plan	$0.00
Giving FEC, NPO	$25.00	Estimated Capacity	$2,155,474.73
Inner Circle Flag	Y	Inner Circle Match	N
DOB		Screening Date	3/2/2011

WealthEngine - Quality of Match Fields

Field	Value	Field	Value
WealthID Securities	0	POWR	0
D&B	0	Vol. and Directors	0
Market Guide	0	Trustees	0
Guidestar	0	GS Fdns	0
FEC Campaign	0	S.S. Death Index	0
Bus. Registration	0	Phil Gifts	0
Hoover's	0	Households	0
Lexis Nexis	11	St. Pol. Don.	0
Who's Who	0	527 Directors	0
Aircraft	0	527 Contri.	0
Airmen	0	Merchant Vessels	0
Physician's Profile	0	Pension	0
Client Donor	0		

> Note: In order for the FindWealth Screening Services feature to function for a constituent, you need to do one of two things:
>
> - Flag the constituent records and contact your DonorPerfect representative to have them screened
>
> - If you have purchased WealthConnect, you can use it to screen constituents at any time

► To update FindWealth data for a constituent

1. Open the constituent record in the Main Entry Screen.

2. Click on the **Access WealthEngine** link at the top of the page. The Accessing WealthEngine pop-up screen appears:

Accessing WealthEngine

Would you like to open the WealthConnect portal to view prospect information for this constituent or update this record with data from WealthEngine?

[Open WealthConnect]   [Update Current Record]   [Cancel]

3. Click on the **Update Current Record** button.

Prospect Generator

Prospect Generator is an additional Weath Engine module that can be purchased in addition to the basic FindWealth Online subscription.

Prospect Generator is designed to be used most effectively in combination with FindWealth Online and allows you to identify prospects in your area that you may not yet know and who could be future donors. Access a cutting edge, proprietary database of 7 million individuals worth $1M+. You set the criteria based on organization type, geographic area, net worth, properties owned, stock & options, etc. and download the results for instant prospecting, upselling and direct marketing opportunities. You can search by city, state and/or zip code or add a net worth range, property count, real estate value and more!

Depending on which level of Prospect Generator you subscribe to, you may also have access to **Pinpoint. Pinpoint** allows you to track and update key stock information for a company or its corporate executives.

Set as many criteria as you'd like during a search.

Integrating your WealthEngine Data into DonorPerfect Online

The Screening Process

If you are not screening your entire database, you will be asked to provide the criteria which will identify the records you wish to screen. The most efficient results will be obtained when you provide data for individuals who have a United States address. You may also have 50 to 100 of theses records identified to be used for the Circle of Friends match (You can read more about Circle of Friends on page 14). You will need to provide a flag or criteria to identify these records.

Once this has been done, you can contact your DonorPerfect Online representative. We will extract the records you identified and send them to WealthEngine.

Once we submit your file to WealthEngine for screening, your results will be available within 3 to 4 weeks.

Updating your WealthEngine results into DonorPerfect Online

WealthEngine Import fields are added to a new **WealthEngine Field** section on the **Bio** tab and the new fields in that section are populated with data.

You will also receive a Microsoft Access Database which contains all of the information that has been imported into your DonorPerfect Online database as well as more detailed information.

Interpreting Your WealthEngine Data

Explanation of WealthEngine Fields on the Bio Tab

Upon your purchase of WealthEngine, the following fields are added to the database are added to the **WealthEngine Fields** section of the **Bio** tab of the Main Entry Screen. These fields are then available to be used in reports, filters, and exports.

Field Name	Definition
Gift Capacity Range	Each prospect is assigned a specific Estimated Giving Capacity. The prospect is assigned a rating and is classified into one of thirteen Estimated Giving Capacity Ranges, so that you can easily sort and filter the results.
P2G Ratings	The Propensity to Give (P2G) Score prioritizes the individuals within a file for use in your fundraising efforts. These scores are assigned using a fixed set of criteria, which has significant statistical backing and is highly predictive. Our analysis shows individuals with better P2G Scores will have higher personal contributions (HPC).* A detailed chart demonstrates the percentage of total HPC relative to the percentage of all donors is listed below. We recommend when nonprofits are considering investment, the individuals with better P2G Scores should be cultivated and solicited for larger and upgrade gifts more often than poorer P2G Scores.
Influence	The Influence rating identifies a prospect's level of influence within his/her community based on the number of boards they sit on, whether corporate or philanthropic. Business/employment information, such as the size of the organization; sales volume; years connected with the organization; number of employees; job title; and salary quantify the actual rating. There are four possible ratings (1-4), each representing a different quartile of the client file. The rating structure is as follows. 1= Top Quarter 2= Upper Middle Quarter 3= Lower Middle Quarter 4= Bottom Quarter
Inclination	The Inclination Rating quantifies a prospect's propensity to give. Various pieces of information from matched data sources and the constituent's giving history from your DonorPerfect Online database are weighted to reach the total Inclination Rating. There are three possible ratings, 1-3, each representing a different segment of the client file. The rating structure is as follows: 1= Top Quarter 2= Upper Middle Quarter 3= Bottom Half
Accredited Investor	Individual has an income >$200K for 2 consecutive years, or income >$300K for a household for 2 consecutive years, or household net worth is over $1 million.
Bequest	Bequests are outright gifts made through the provisions of a will. These may come in the form of stocks, bonds or other assets. Yes if age ≥ 65 and capacity ≥ 100,000
Annuity	Contracts or agreements by which the donor receives fixed payments (specific amount or fixed percentage) on their gift for a lifetime or for a specified number of years. 1 if age ≥ 70 & capacity between 100,000 and 250,000. 2 if age ≥ 70 and capacity > 250,000.

Field Name	Definition
Trust	Contracts or agreements whereby gifts are made to the beneficiary for a lifetime or for a specified number of years. 1: If age between 55 - 64 and capacity ≥ $700,000. 2: If age ≥ 65 and capacity ≥ $700,000.
MG Total Comp	Compensation information found in the Market Guide database.
D & B Company Value	Value of a company's financial standing, including sales revenues and number of employees, business titles and, on occasion, executive biographical profiles.
Total FEC Contributions	Total amount of all State, Federal and 527 special interest group donations.
Property Count	Number of individual properties found in Lexis-Nexis.
Annual Income	Estimated from the income source.
Real Estate Value	Value is derived from Lexis-Nexis data.
Wealth ID Sales, Holdings	Total amount of stock transactions for common stock and preferred stock company insiders.
Defined Pension Plans	Information from the annual reports of qualified pension plans such as SEP and Keough on self-employed individuals who have established pensions.
Giving FEC, Nonprofit	Total Political and Non-Profit contributions.
Estimated Capacity	The Estimated Giving Capacity rating was developed to help you rank prospects and prioritize fundraising efforts. Those with the highest capacity rating are those prospects that show the greatest potential to make a substantial gift. The Estimated Giving Capacity is the industry standard that an individual will contribute 2% of their net worth per year to charity.
Inner Circle Match	Contains a Y or N denoting if a match was found during the screening process.
Inner Circle Flag	Denotes that the donor/prospect was identified by you as an Inner Circle Match.
DOB	Populated from a Date of Birth overlay process (additional fee).
Screening Date	Date on which screening was performed.
WealthID Securities	Wealth ID andThomson Financial SEC listings. Current stockprices are taken from Standard & Poor's with historic transactions going back to 1986.
POWR	Prospects of Wealth & Resources are individuals who have a net worth of at least one million dollars plus houses, yacht or airplane ownership, and are one million dollar investors.

Quality of Match Fields

For each wealth database reviewed, the Quality of Match score (QOM) is calculated, providing a "confidence" gauge in each piece of matched data, as well as a simple way for you to segment and evaluate the results. Additionally, a high quality of match can quickly become the reference point for evaluating the accuracy of a lesser match in another category.

In general, a QOM score of 9 or more is considered an exact match; a score of 6-8 indicates a high confidence level; and a score of 5 or less suggests that additional research efforts are needed to either confirm or deny the relation.

WealthEngine uses basic biographical data to conduct searches of fields in a variety of wealth databases. The fields are searched using the following information regarding the individual provided by you, the client:

- first name
- middle initial
- last name
- home address
- city
- state
- zip

- regional geography
- employer name

Circle of Friends Fields

The Circle of Friends is a unique relationship feature of the WealthEngine data mining process. This process will uncover individuals that share board memberships, where the donor/prospect has volunteered, worked and many others. Often this report can uncover connections not already known. The Circle of Friends report is categorized by the database in which the information was found and where available may list name, organization and title.

You will (or have already identified an Inner Circle donor/prospect if a screening has been performed) is an individual determined to be "key" to your organization. An Inner Circle match can be very helpful since it identifies a connection to an organization and an individual.

The Inner Circle Match field will contain a Y or N denoting if a match was found during the screening process.

The Inner Circle Flag field denotes if that donor/prospect was identified by you as an Inner Circle Match.

New Filters Added to Your DonorPerfect Online System

In addition to adding fields to the **Bio** tab of the Main Entry Screen, we've also added some new saved filters to your database to help you take a closer look at the results. You can use these filters with any of the standard reports provided in DonorPerfect Online. Here's a brief explanation of each of these filters:

- WE Date Stamp – Filters by the date on which the data was populated. This will help you find records that have gone through the WealthEngine Screening process.

- P2G = 1 - This is a group of extremely well qualified matches. Statistically, they are the most productive group for major gifts. These individuals should receive high-end treatment via mail, phone, or email programs. They should be verified before they are contacted as part of a major gift strategy.

- P2G = 2 – This is another group of well qualified matches. Like P2G 1, they are statistically a more productive group for major gifts.

- P2G < = 3 – Records with a P2G score of 3 or higher are statistically less likely to give major gifts. These individuals should still be contacted however a major gift should not be expected.

- Inner Circle Flag = Y indicates you have identified or chosen them as a member of the Inner Circle.

- Inner Circle Match = Y indicates that donor/prospect has a link to a member of your Inner Circle.

New Custom Reports Added to Your DonorPerfect Online System

We've also added some additional custom reports to make it easier to view the results. To make it even simpler, these reports have already been configured to automatically filter for the correct records so they're very easy to produce. Just click on Reports, then Custom Reports. Select the report you want, click Run, and you're all set to go.

- **Rating Overview Report** - Provides the Name, Giving Range, Capacity Range, P2G scores, Planned Giving Ratings, Influence and Inclination scores.

- **P2G Rating Report** – Provides the Name and address along with the P2G and Giving Capacity levels.

- **Inner Circle Report** – Provides the Donor ID, Name, Inner Circle Matched field, Inner Circle Flag field and each record the donor/prospect is linked to in your DonorPerfect Online Database.

Frequently Asked Questions

What sort of training does WealthEngine offer?

In order to continue to help users become familiar with using FindWealth Online, WealthEngine offers free training online sessions. Please call the WealthEngine Customer Service team at (301) 215-5980 option 3 or send an email to training@wealthengine.com to schedule an appointment.

Additionally, you can view the training schedule and enroll via the following URL:

> **http://www.wealthengine.com/nonprofit/our-services/product-training**

WealthEngine Training Guide:

> **https://www.wealthengine.com/we/help/pdf/FWO_TrainingGuide_18NOV2009.pdf**

You can also contact Max Rothwell at WealthEngine Client Services at (240) 722-4386 or mrothwell@wealthengine.com for assistance.

Now that I have the results, what do I do with them?

This information is extremely valuable and should be treated like gold at the end of a rainbow! It helps you to get to know your donors/prospects and help you determine the right "ask" amount by using some of the selection filters we've provided.

I thought there would be more information?

There is much more in the Microsoft Access Database that has been provided to you. The **WealthEngine Fields** section of the **Bio** tab is intended to provide a snap shot of information which the Microsoft Access file contains specific details on the donors/prospects who were screened.

I'm missing data from some of the records?

That's not unusual. WealthEngine accesses over 35 databases which collect public information, and not every prospect is listed in every database. Thus, for some prospects, some fields contain no information.

Are the results guaranteed?

WealthEngine does extensive updating and research in order to verify the information collected, however since it's public information nothing is guaranteed.

How do I know what amount to "Ask" for?

Look at the donor/prospects Giving Capacity field. The estimated giving capacity is an individual will contribute 2% of their net worth per year to charity.

I don't understand what some of the fields mean?

We understand the information may be a bit confusing which is why you we have provided resources for you. In addition to this guide, the DonorPerfect Online support staff and WealthEngine's customer service, WealthEngine offers training which is included in your annual FindWealth Online subscription. Contact them at 301-215-5980 ext 3, 8:00 to 5:00 EST Monday through Friday or via email at customerservice@wealthengine.com.