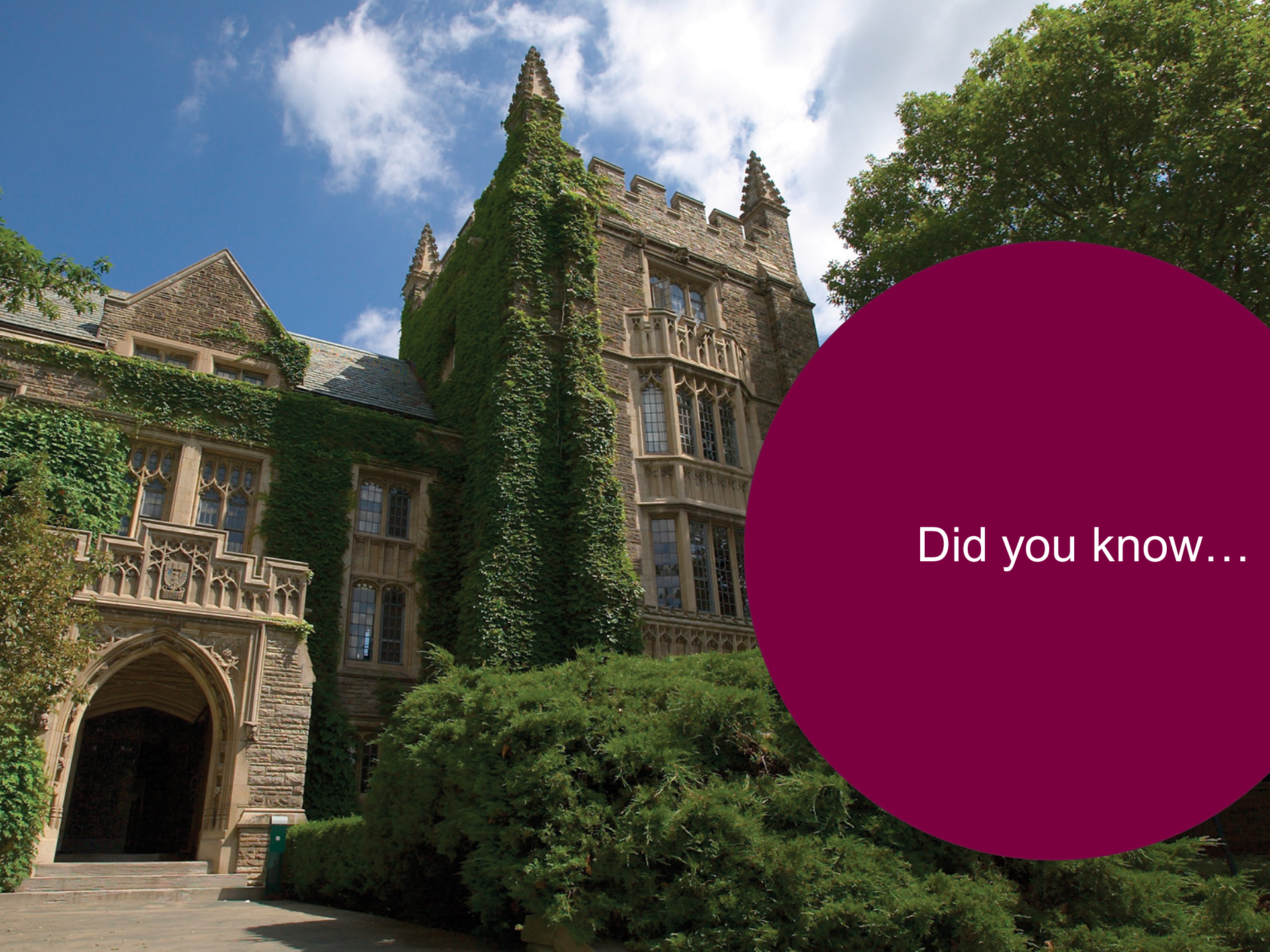


Inciteful Insights

July 2018

*Karen McQuigge
Anne-Marie Middel
Jeff Wahn
Sarah Thurlow
Melanie Vonau
John Gormaly*

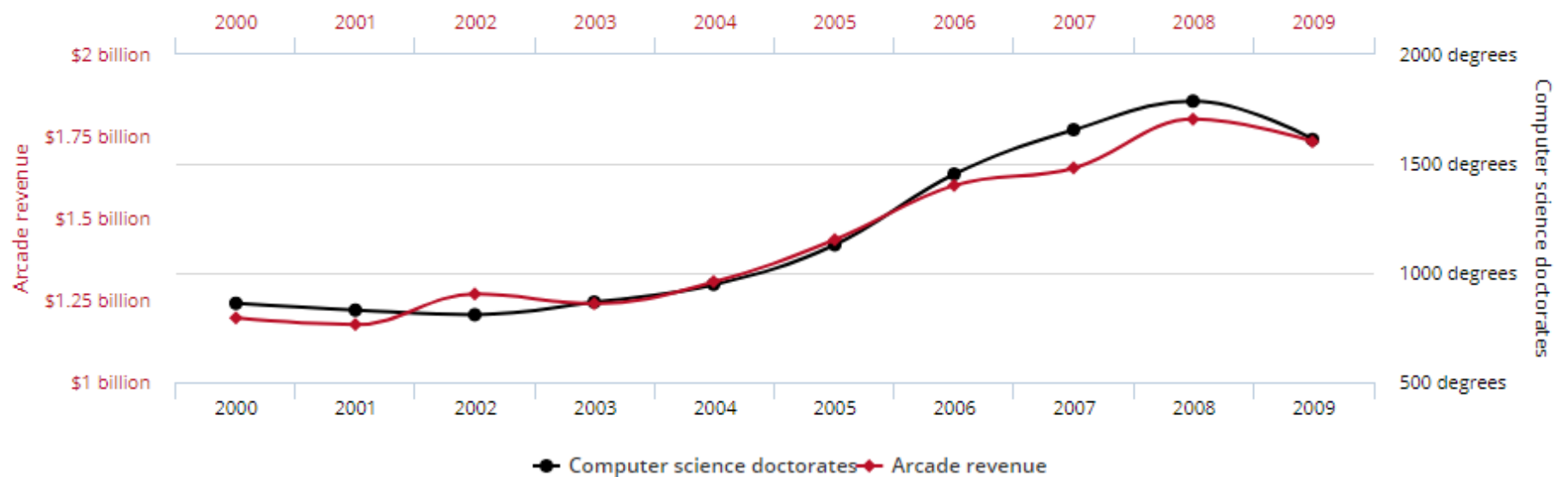




Did you know...

Total revenue generated by arcades correlates with Computer science doctorates awarded in the US

Correlation: 98.51% ($r=0.985065$)



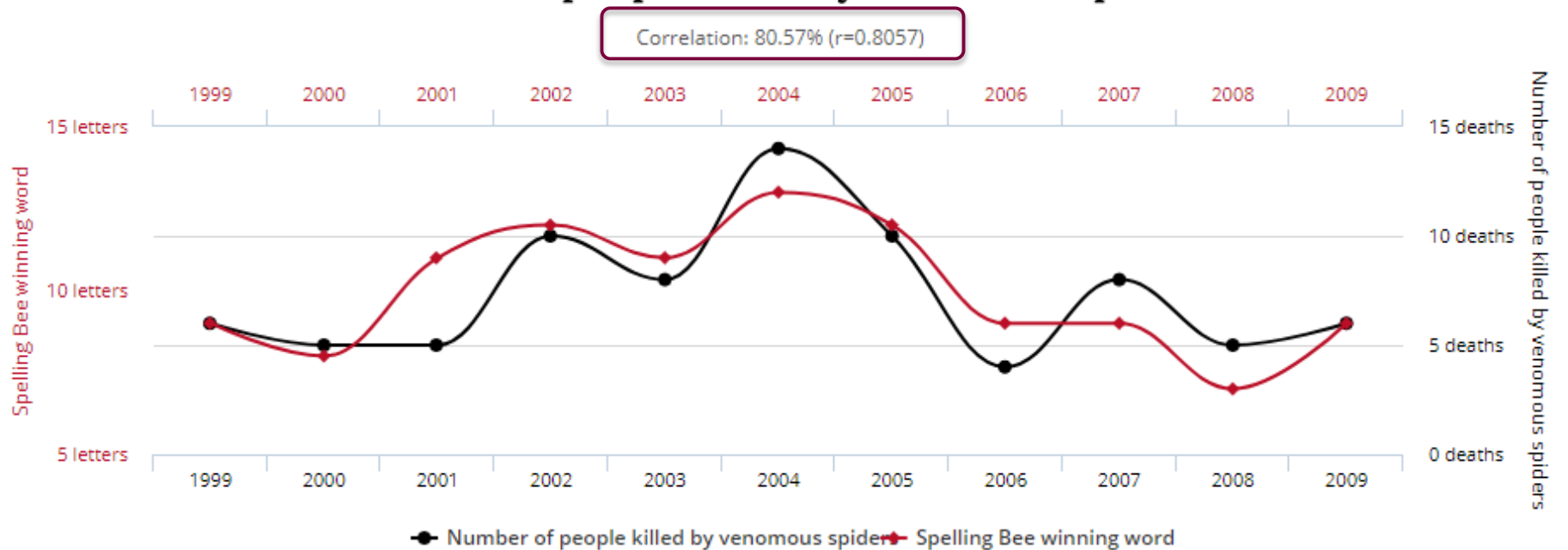
tylervigen.com

Data sources: U.S. Census Bureau and National Science Foundation

Stats refresher

- **Correlation**: indicates the extent to which two or more variables fluctuate together (interdependence).
 - **Between -1 and +1**
 - **Positive (+)** correlation indicates the extent to which those variables increase or decrease in parallel.
 - **Negative (-)** correlation indicates the extent to which one variable increases as the other decreases.
- Keep in mind... **Correlation \neq Causation**

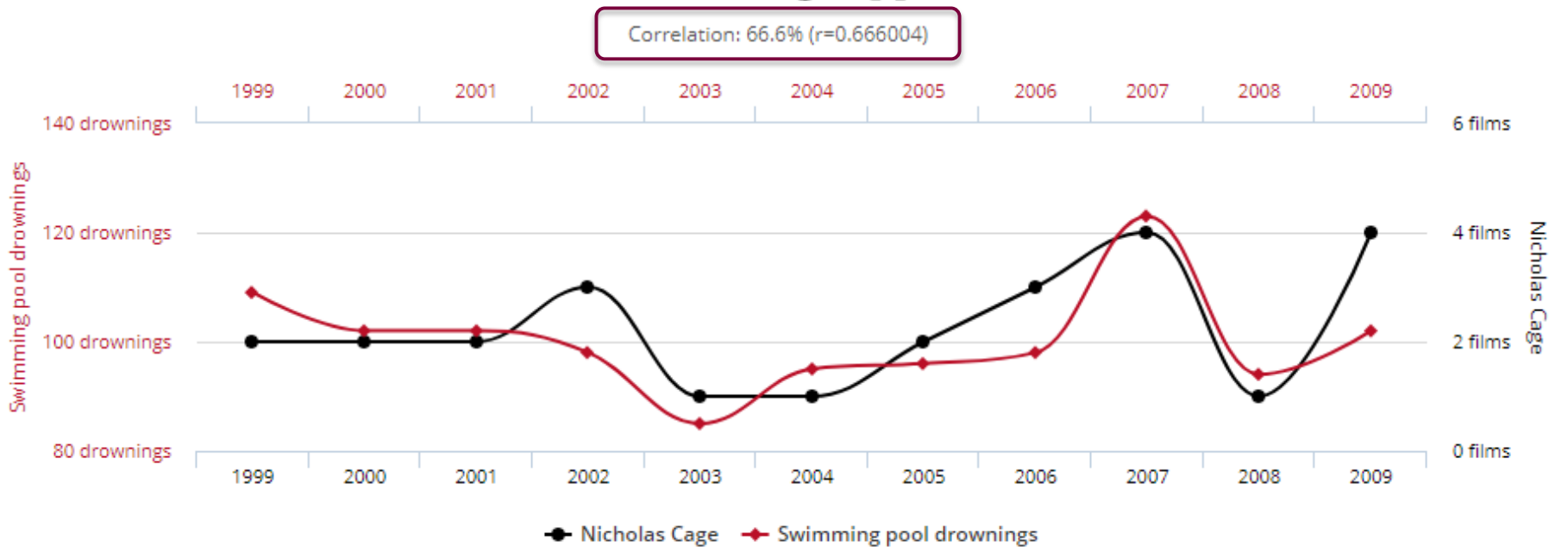
Letters in Winning Word of Scripps National Spelling Bee correlates with Number of people killed by venomous spiders



tylervigen.com

Data sources: National Spelling Bee and Centers for Disease Control & Prevention

Number of people who drowned by falling into a pool correlates with Films Nicolas Cage appeared in



Data sources: Centers for Disease Control & Prevention and Internet Movie Database



Analytics & Insights

Partners in growth



Provide **actionable insights**
through **data-informed solutions**
that will help **evaluate and grow**
our programs.



2018 Plan

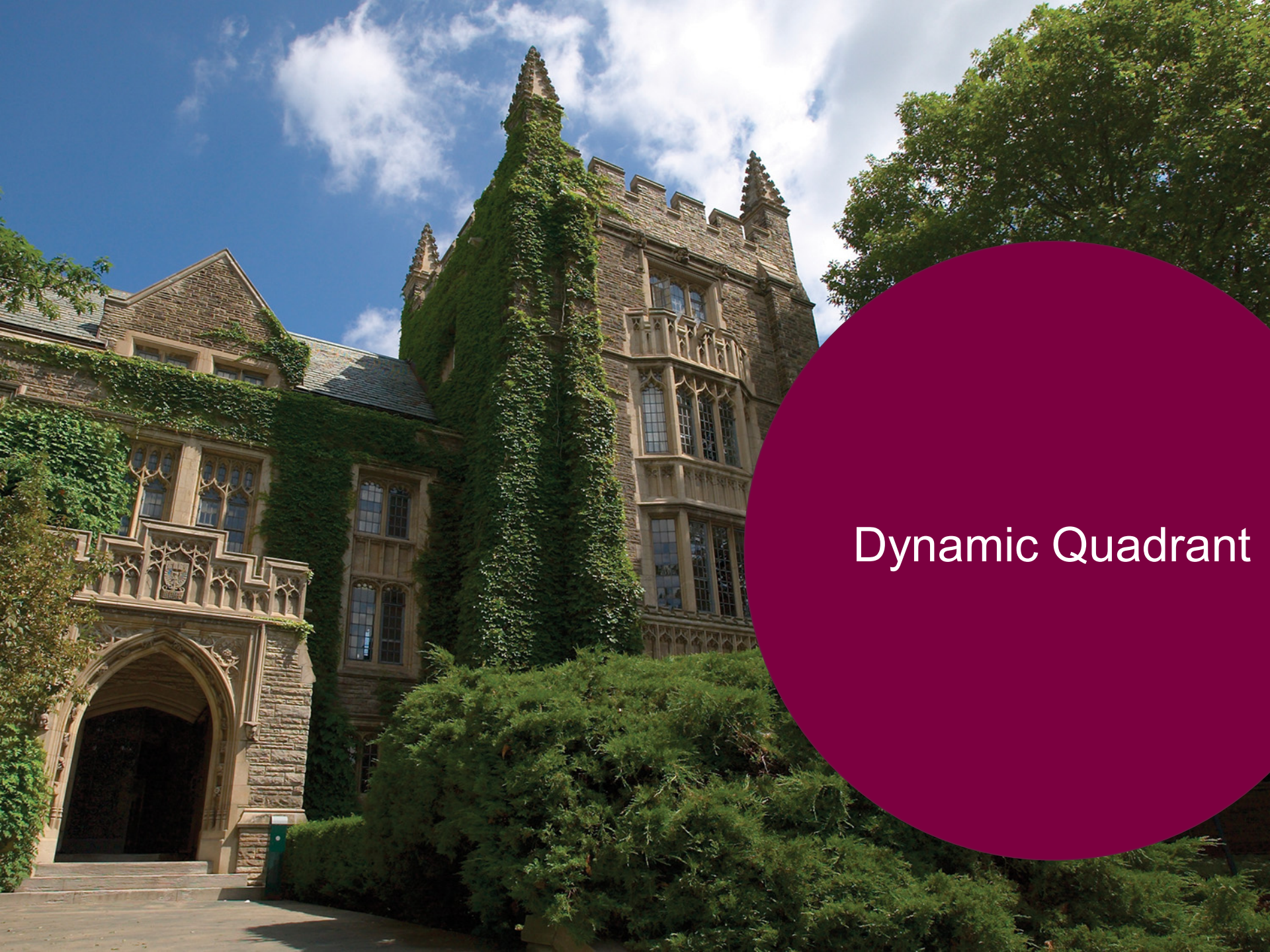
- Establish governance structure
- Support priority objectives
- Serve in preparations for Brighter World Research Initiative
- Build front-line capabilities

Analytics Evolution

From baseline to wisdom



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Dynamic Quadrant

Dynamic Scores

Dynamic Affinity Score

- Degree
- Student activities
- Volunteer experiences
- Scholarships & awards
- Activities
- Contact/Engagement
- Giving Frequency
- Bequest

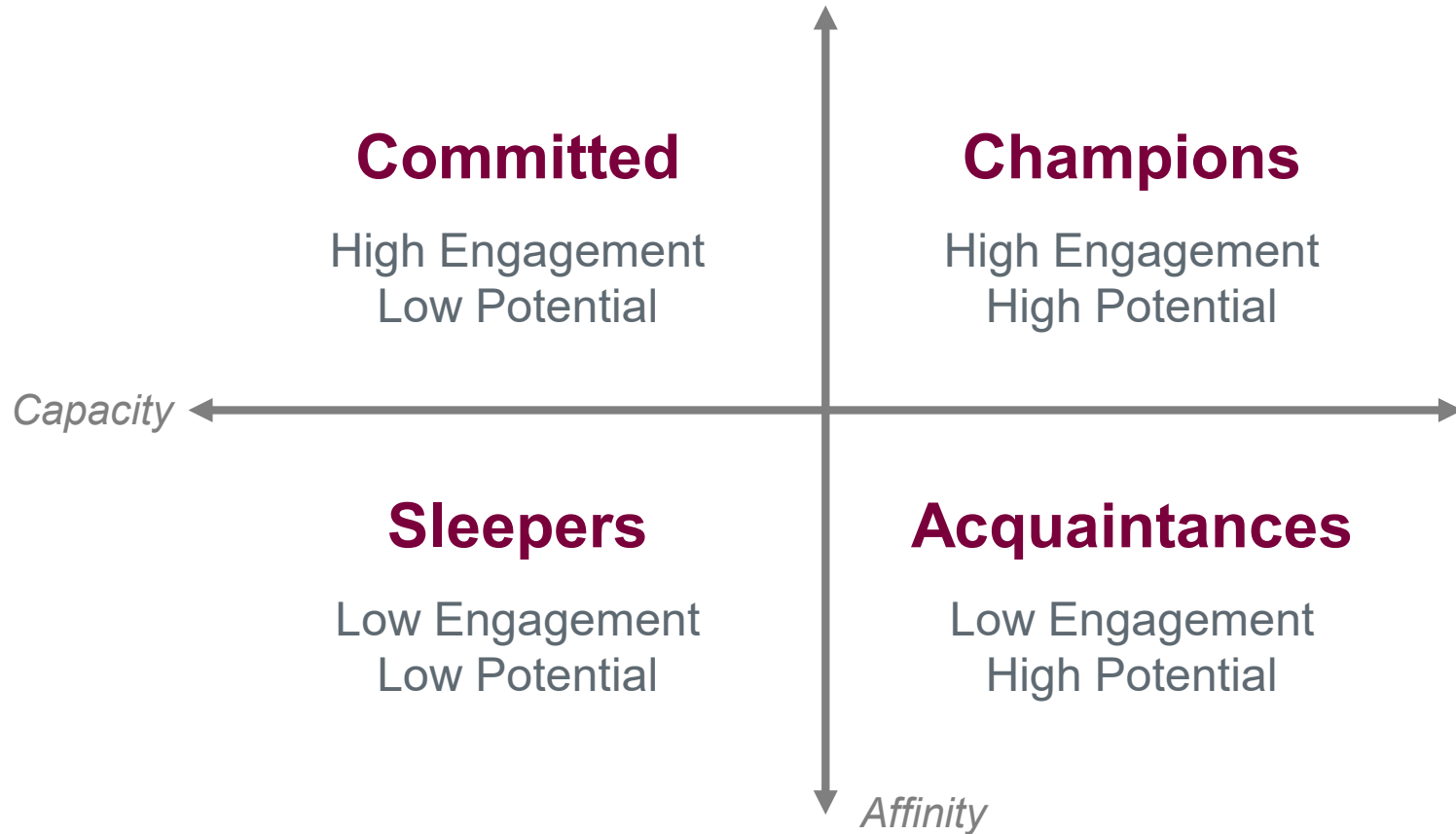
/ 47

Dynamic Capacity Score

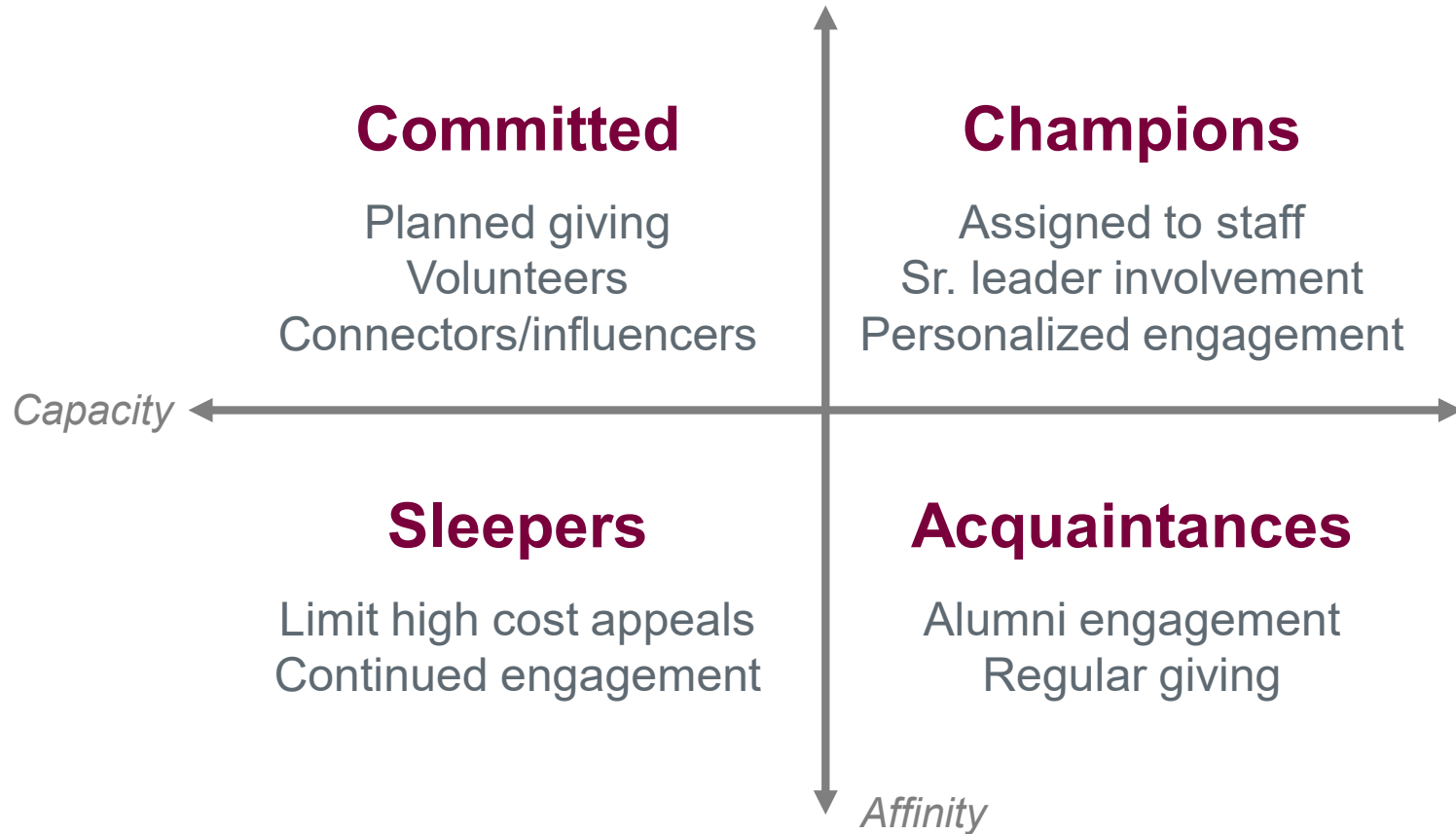
- Giving
- Employment
- Family Income

/ 40

Dynamic Quadrant



Potential Strategies



Dynamic Interest Score

Behaviour

- Donations
- Event attendance
- Volunteering

Self-Identified Interest

- Survey
- Social media



Dynamic Interest Score

Eddard Stark - ID#0123456789

Eddard Stark - ID#0123456789			Features (input variables)				
Segments	Code	Score %	LT Giving School ¹	LT Giving Purpose ²	Survey EAI - Vol ³	Survey EAI - Support ⁴	Survey QOTWC-Persona ⁵
Athletics & Sport	NAT	23%	NAT				ATH
Business	BUS		BUS				
Capital, Operations, & Equipment	NAD		NAD	E, O, X		X30-A06	CB
Community	COM	6%		C	X26-A03	X30-A07	
Engineering	ENG	18%	ENG				
Health Sciences	HSC		HSC		X26-A01		
Humanities	HUM		HUM		X26-A05		
Library	NLB		NLB	L			LIB
Museum	NMU	30%	NMU				
Office of Alumni Adv / MAA	NUA		NUA				
President	PRE		PRE				
Research	NRS		NRS	R		X30-A04	
Scholarships & Bursaries	SCB	23%		S		X30-A01, X30-A02	SB
Science	SC		SC				
Social Sciences	SSC		SSC		X26-A02		
Teaching & Learning	TLR	23%	NAP, NAF, NAL, NPR	A	X26-A00	X30-A05	
Unrestricted	URE			U		X30-A00	UGN
		16	5	5	2.5	2.5	1

¹ Lifetime giving (# and \$) to allocation school

² Lifetime giving (# and \$) to allocation purpose

³ Alumni Engagement survey (2015) – *Do you currently volunteer for another organization than McMaster? Select the type of organization*

⁴ Alumni Engagement survey (2015) – *In the next year, if McMaster asked you to make a contribution to support one of the following specific projects, please choose the area(s) you would likely support. (Select up to three.)*

⁵ QOTWC Alumni Persona survey (Nov 2017) – *You make a gift to support the University. Where does it go?*

Demo



Alumni - Preferred Faculty

Non Alumni

Arts & Science

Centre for
Continuing
Education

Faculty of
Business

Faculty of
Divinity

Faculty of
Engineering

Faculty of
Health
Sciences

Faculty of
Humanities

Faculty of
Science

Faculty of
Social
Sciences

School of
Graduate
Studies

School of
Phys. Ed.

School of
Social Work

Interest

- ☐ Select All
- ☐ Administration
- ☐ Athletics & Sport
- ☐ Business
- ☐ Community
- ☐ Engineering
- ☐ Health Sciences
- ☐ Humanities
- ☐ Library
- ☐ Museum
- ☐ Office of Alumni Adv/MAA
- ☐ President
- ☐ Research
- ☐ Scholarships & Bursaries
- ☐ Science
- ☐ Social Sciences
- ☐ Teaching & Learning
- ☐ Unrestricted

Interest Level

- ☐ Select All
- ☐ High
- ☐ Medium
- ☐ Low

User Documentation

Data Dictionary

Primary Staff

All

Position Level

All

Executive Positions

☐ N

☐ Y

Alumni Y/N

☐ N

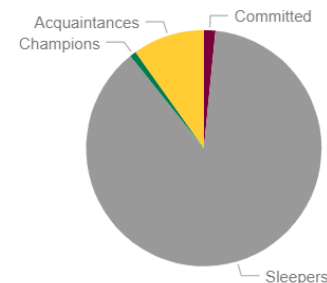
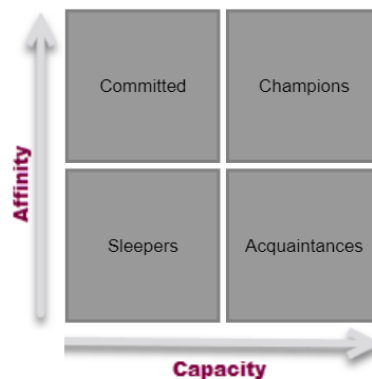
☐ Y

Age Range

- ☐ < 30
- ☐ 30 to 39
- ☐ 40 to 49
- ☐ 50 to 59
- ☐ 60+
- ☐ No Age

Donor Type

- ☐ N/A
- ☐ Annual Fund
- ☐ Major
- ☐ Principal



214,996
Total # of entities

100.00%
Overall Percentage

Segment ● Committed ● Sleepers ● Champions ● Acquaintances



ID	Name	Consolidated Giving	Primary Staff	Quadrant	Affinity Score	Capacity Score
0000052558	Dr. Michael G. DeGroot	\$177,909,241	Mrs. Lorna Somers	Acquaintances	7	
0000066653	Mr. Tim DeGroot	\$177,909,241	Mrs. Lorna Somers	Sleepers	2	
0000066654	Mr. Michael H. DeGroot	\$177,909,241	Mrs. Lorna Somers	Acquaintances	3	
0000066655	Mr. Gary W. DeGroot	\$177,909,241	Mrs. Lorna Somers	Acquaintances	8	
0000067580	Mrs. Joni S. Tipping	\$177,909,241	Mrs. Lorna Somers	Acquaintances	3	
0000141392	Ms. Nancy Gordon	\$60,014,405	Mrs. Lorna Somers	Sleepers	3	
0000143542	The Hon. David Braley	\$60,014,405	Mrs. Lorna Somers	Champions	13	

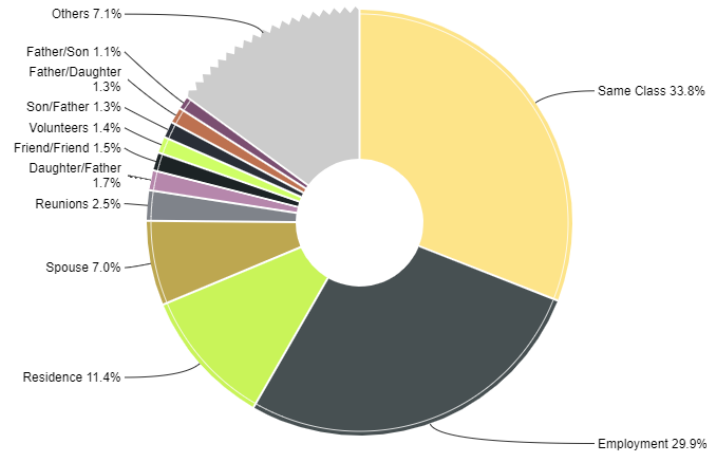


Id Number

Name

Relationship Id Number

Relationship Mapping



157,964

Number of Entities

156,947

Number of Related Entities

CharityCAN <https://charitycan.ca/>



Id Number	Entity Type	Name	On Pledge	Quadrant	Primary Staff Assigned	Relationship Id Number	Rel_Entity Type	Rel_Name	Rel On Pledge	Rel_Type	Rel_Type (Desc)
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000001214	AL	Dr. Bill Arnott, PhD	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000006224	AL	Mr. Stewart Carmichael	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000017988	AL	Mr. John Henning	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000030453	AL	Mr. Christopher Morgan	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000032537	AL	Mrs. Vivien Goss	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000033858	AL	Mr. Steven Peter	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000037863	AL	Mr. David Saunders	N	Same Class	Faculty of Science-1982-U-
0000000004	AL	Mrs. Piret Aasa Hurrell	N	Sleepers	Unassigned	0000038139	AL	Mr. Wolfgang Schnitker	N	Same Class	Faculty of Science-1982-U-
0000000005	AL	Reverend Paul Aasman	N	Sleepers	Unassigned	0000006915	AL	Mrs. Mary Cheeseman	N	Same Class	Faculty of Humanities-1983 Civilization
0000000005	AL	Reverend Paul Aasman	N	Sleepers	Unassigned	0000008253	AL	Mr. Douglas Coombs	N	Same Class	Faculty of Humanities-1983 Civilization
0000000005	AL	Reverend Paul Aasman	N	Sleepers	Unassigned	0000008951	AL	Ms. Freda Crisp	N	Same Class	Faculty of Humanities-1983 Civilization
0000000005	AL	Reverend Paul Aasman	N	Sleepers	Unassigned	0000026363	AL	Ms. Vaughn Madden	N	Same Class	Faculty of Humanities-1983 Civilization

Entity Overview

Dr. Joseph Trainer #227330 (Removed by Request)

Rec Type Anonymous Giving (2007 Faculty of Science), Alumni (2007)

Degree BA 2007 [More...](#)

Prim Affil

Formerly married:

ATTENTION

Picture

Contact Information

[Actions](#) [Help](#)

Home (Preferred)

PO Box 9751 STN DON MILLS

Toronto, ON M3C 0C1

Modified: May 02, 2017

(647) 999-9999 (H, Pref)

Business

President

Chase Manhattan Bank

50 Main St E

Hamilton, ON L8N 1E9

Modified: May 02, 2017

[Home google map](#)

[Business google map](#)

Preferred Email

joe.trainer@gmail.com

Consolidated Giving Entity Overview

[Actions](#) [Help](#)

ID Number	Name	Consolidated Giving	Donor Type
0000227330	Dr. Joseph Trainer	\$0.00	N/A

Assignments (0)

[Actions](#) [Help](#)

Type	Assigned To	Office	Assignment Type	Active
------	-------------	--------	-----------------	--------

Champion

~~DAR Score~~

~~DCR Score~~

Last Contact: Either Set up visit or Visit (Date and by whom)

Internal Evaluation Note:

R: '07 BSc, I: Entrepreneurship C: based on stock holdings and salary Major Gift [Capacity](#) > 259,000

Profile: Provide [url](#) of profile note.

Wealth Notes: If available provide Annual Family Income, Real Estate Value from Wealth Indicators page

Other Philanthropic Affinities:

2006 - \$260,000 to McMaster Hospital for MRI

Relationships (from the Relationship Map on BI)

Dynamic Quadrant

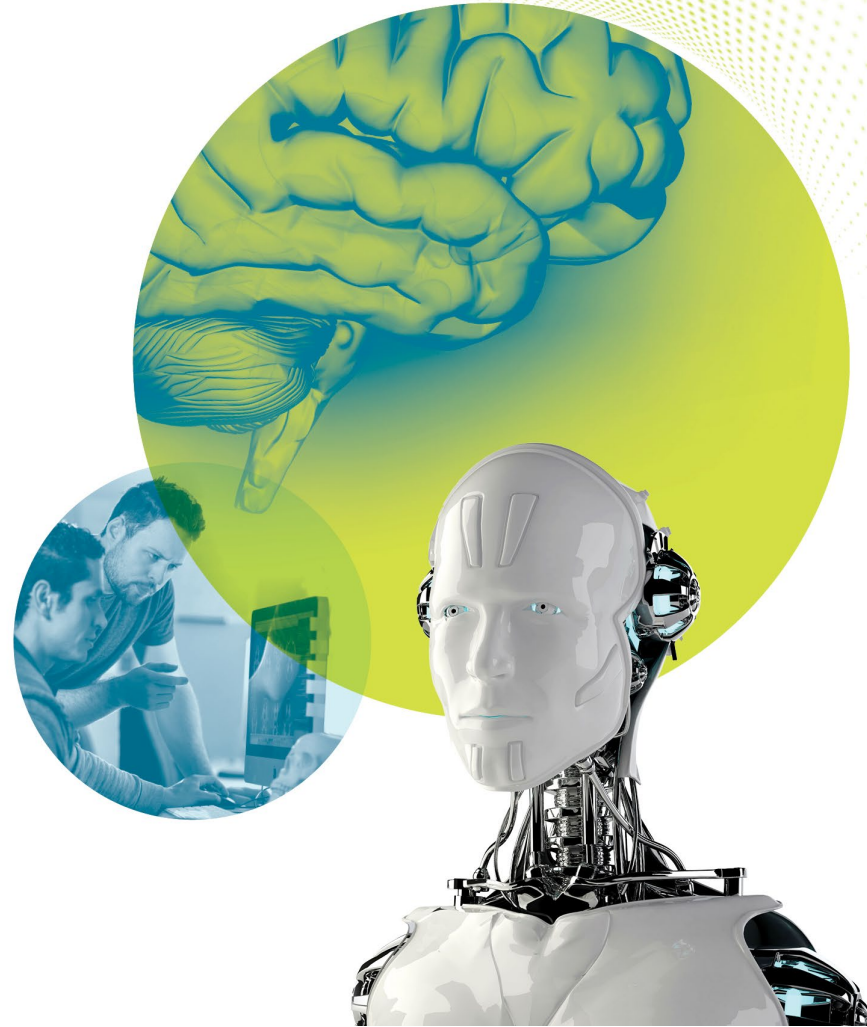
Relationship Mapping

Profile

Phase 2 (TBD)

Continuous improvement

- Donor profile report
- Additional table fields
- Generation slicer
- Social media data
- Internal relationship score
- Dynamic Interest Score





Finding your people

Task: Identify a list of people of interest.

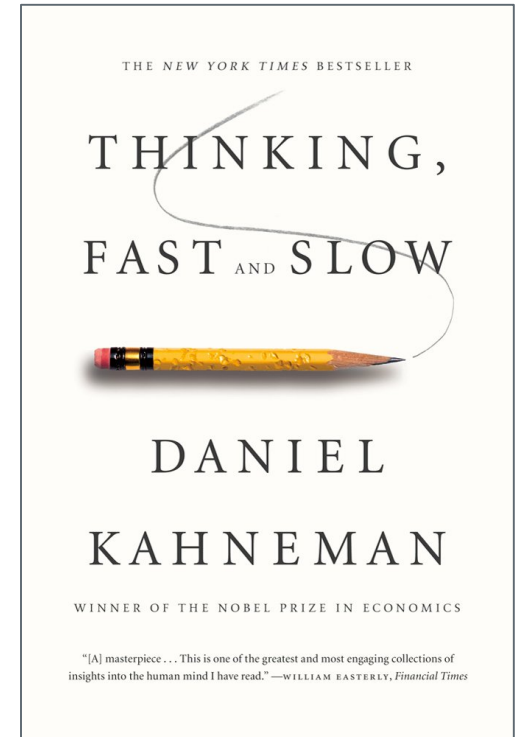
Activity #1



Anchoring

Anchoring

- We rely heavily on the first piece of information offered (the “anchor”) when making decisions
- Seeing a number – *even a random and unrelated number* – can have an outsized effect on our rational thinking.
- Bias toward interpreting other information around the anchor



Anchoring Example 1

- Judges with >15 years experience reviewed details of a shoplifter's case.
- Before making a sentencing judgment, rolled dice rigged to always show 3 or 9.
- On average, those who rolled...
 - 9 said they'd sentence defendant to 8 months
 - 3 said they'd sentence defendant to 5 months
- **Difference = 60%**

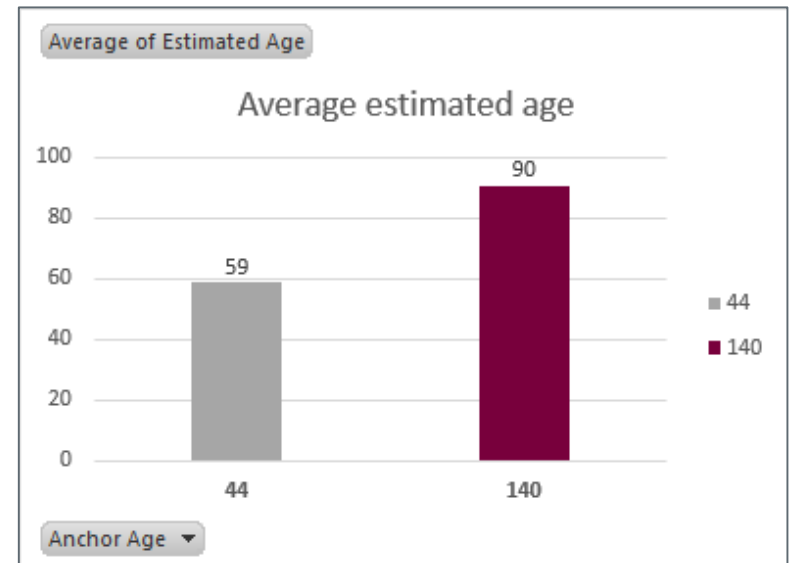


Anchoring Example 2

- Asked guests of the Exploratorium if they would make an annual contribution to “*save 50,000 offshore Pacific Coast seabirds from small offshore oil spills?*”
- Guests were first asked an anchoring question – “Would you be willing to pay \$x...?”
- On average, they said they would donate...
 - No anchoring question = **\$64**
 - \$5 Anchor = **\$20**
 - \$400 Anchor = **\$143**

Anchoring Example 3

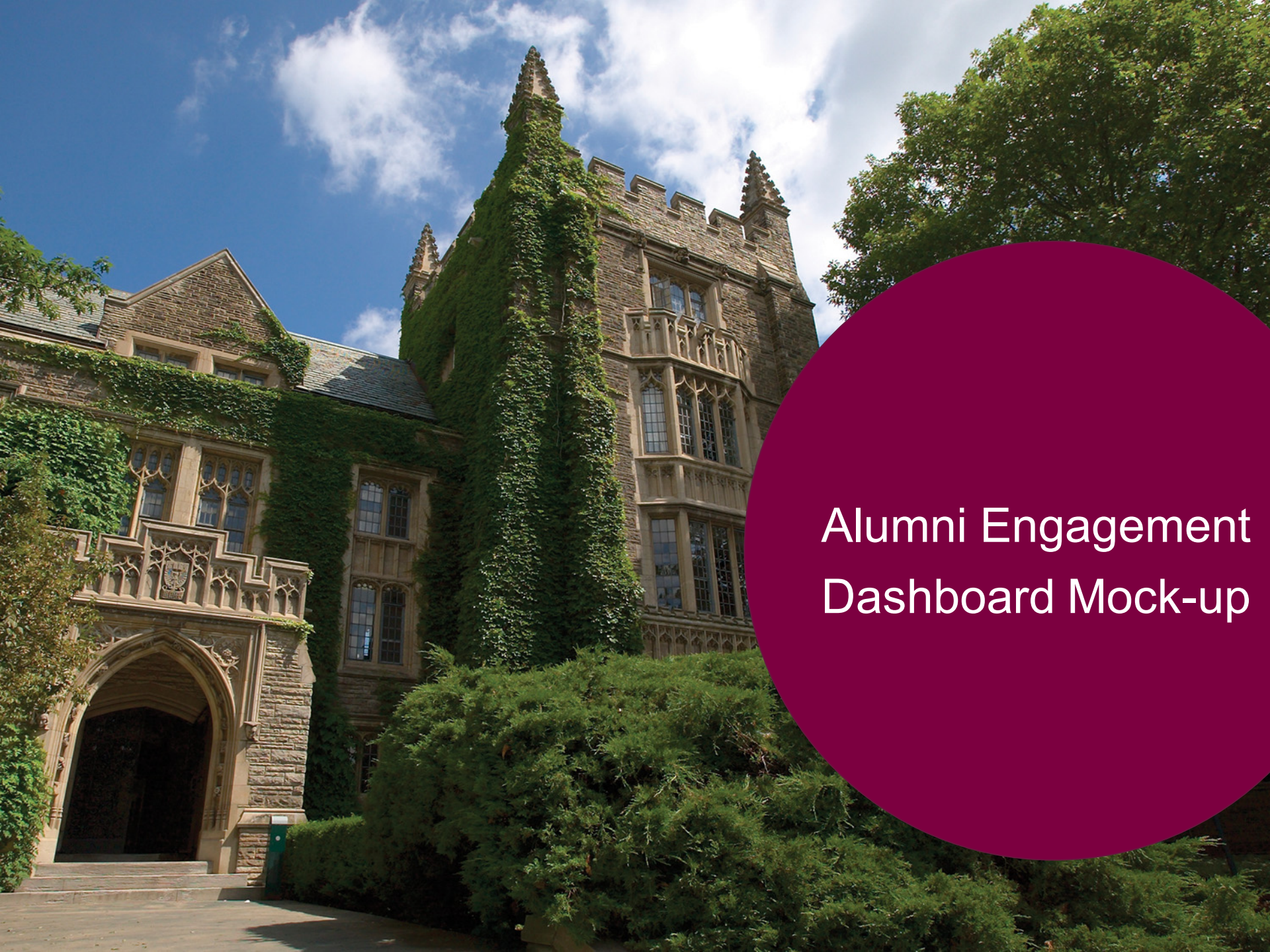
- 31 UA colleagues “How old do you think Gandhi was when he died?”
- First asked an anchoring question – “Was Mahatma Gandhi older or younger than {INSERT ANCHOR AGE} when he died”
- The average estimated age of Gandhi* when he died was...
 - 44 Anchor Age = **59**
 - 140 Anchor Age = **90**
- **Difference = 54%**



* Gandhi was 78 when he died

Anchoring...so what?

- Use multipliers to increase your dollar handle
 - Provide tangible value to your donors
 - *Example: instead of leading with \$1.76 provides a hot meal, try \$88 provides 50 hot meals.*
- Limit the low end of ask arrays
 - Test leaving out anything on the low end in ask arrays.
 - *Control: low | avg | high | open*
 - *Test: high | open*
 - Test using average online gift and rounding up



Alumni Engagement Dashboard Mock-up

Break



iModules
Engagement Score
& Email Analysis



Tableau Exploration

*Task: Overview of Tableau dashboards
and learn to create lists.*

Activity #2



Advance &
iModules

A photograph of a university campus in autumn. In the foreground, a group of five students are sitting on a grassy lawn covered with fallen orange and yellow leaves. A bicycle is parked nearby. In the background, a large, multi-story brick building with many windows, some of which are covered in ivy, stands prominently. The scene is bathed in warm sunlight, with trees showing vibrant autumn foliage. A large, semi-circular purple graphic is overlaid on the right side of the image.

Questions?