

4,424 records returned with Principal Giving Solution scores

- **Principal Giving Solution** scores identify individuals with both the **likelihood** and **capacity** to give at least \$250K to UNC- Chapel Hill
- Combines both likelihood and capacity to give specifically to UNC- Chapel Hill
- Data returned in 4 easy to use Tiers:
 - Tier 1 = \$1M+
 - Tier 2 = \$750K
 - Tier 3 = \$500K
 - Tier 4 = \$250K

All additional records returned with ProspectPoint® predictive giving analysis scores

- **ProspectPoint®** is a custom predictive modeling process to assess each individual's likelihood to give certain types and levels of gifts specifically to UNC- Chapel Hill
- Use MGL & TGR in tandem, or PGL, to create pools of likely prospects with focused capacity

Major Giving Likelihood (MGL)

- Inclination of a prospect to make a major gift to UNC- Chapel Hill
- Scored from 0-1000
- The **higher** the score, the more likely
- Suggested segmentation:
 - Excellent = 851-1000
 - Very Good = 651-850
 - Less Likely = 0-650

Planned Giving Likelihood (PGL)

- Appended to ALL records, including those with Principal Giving Tiers
- Inclination of a prospect to give a Bequest, CGA or CRT to UNC- Chapel Hill
- Scored from 0-1000
- The **higher** the score, the more likely
- Suggested segmentation:
 - Likely Prospects = 601-1000

Target Gift Range (TGR)

- Projected gift level each individual appears to have for UNC- Chapel Hill
- There are 12 ranges
- Each prospect receives an assigned gift range that presents a suggested ask amount range for a **one-year period**
 - 1: \$1 - \$50
 - 2: \$51 - \$100
 - 3: \$101 - \$250
 - 4: \$251 - \$500
 - 5: \$501 - \$1,000
 - 6: \$1,001 - \$2,500
 - 7: \$2,501 - \$5,000
 - 8: \$5,001 - \$10,000
 - 9: \$10,001 - \$25,000
 - 10: \$25,001 - \$50,000
 - 11: \$50,001 - \$100,000
 - 12: \$100,001 +

All records appended with WealthPoint Rating directional capacity indicator

- WealthPoint Rating provides a directional indicator that ranks prospects on potential gift capacity
- Based on a proprietary formula that weights information found in public databases
- There are 7 categories whereby public assets are:
 - A = \$25M+
 - B = \$10M - \$25M
 - C = \$5M - \$10M
 - D = \$1M - \$5M
 - E = \$500K - \$1M
 - F = \$100K - \$500K
 - G = Wealth indicators found