

Women's Philanthropy Data Analyses for a large nonprofit
(useful if hard to pull general gender information)

Request #1 – **Baseline:** comparison of women and men's giving

- Segment single women and single men (single = divorced, widowed, never married, or giving to you without any data entry about a spouse/family.)
- Compare the singles general giving (gifts of any size) over the past 5 years of each gender:
 - What is the total amount of giving by women vs men's total giving in this same time frame?
 - What is the total # of gifts given by women vs total number of gifts given by men in that time period?
 - What is the average size gift of women vs men?
 - What is the growth of single women giving across five years, vs men? I'm interested if women are giving more in year 5 than they were in year 1, and are men giving more in year 5 than they were in year 1?
 - Now take the same segment of singles, and segment further so you are looking at only Gifts of 5K and higher.
 - Over the most recent five years, analyze total giving, total # of gifts, and average size gift of men vs women.

Request #2= **Growth Potential:** giving as a % of wealth rating and projection to determine the potential from women with more attention & cultivation

- Again segment single women and men (using the definition of single in Request #1), but only those who have wealth ratings
- Analyze the men's giving vs their wealth rating (i.e. if he is rated to give \$1M over 5 years, and is giving about \$300K over 5 years, he is giving 30% of his wealth rating)
- Do the same analysis for rated single women.
- Compare the two. Usually women have a lower % of giving compared to their wealth rating, in part because of lower cultivation and lower asks.
- Now run some scenarios of how much more might be raised if this set of women increased their % of giving against their rating by 5%? Or by 10%?
- These numbers demonstrate the dollars being left on the table right now because women are under cultivated.

Request #3 – **Retention:** analyze potential lost income if women move on. Women in couples are influencing or deciding 75% or more of the household charitable donations now. If the spouse is getting the visits or attention or thank you letters, she is often likely (upwards of 70% of the time) to start giving elsewhere when he dies. She feels "it is her turn to give where she wants and where she is valued". This may be a retention miss.

- Pull a segment of coupled households that are giving \$5K or more annually, and their ages are 60+, and he is noted as primary in the data records.
- Further segment this group by the default salutation where a letter is sent to only him, or his name is first.
- Note the total amount of giving by this group in one year.
- To be conservative, now calculate 33% of this total (rather than the potential 70% loss noted in research if women move on). 33% of the total giving is the conservative potential loss in one year if women move on.
- Multiply this potential annual loss by 6 years (women outlive men by 6+ years)
 - This is the amount of money that may be lost to CRS if women in a couple are not equally stewarded.
 - The near-term adaptations are to reach out to the 60+ age couples and begin awareness of her motivations and interests, adapt acknowledgements and consistently include the wife in cultivation.