



Welcome to

KINDFEST

2026
KindCon

Leaving No Stone Unturned

Advanced prospect research for major
and principal gifts

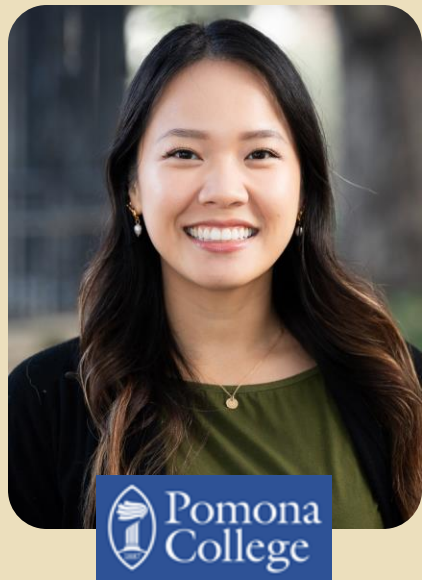


Who has capacity + genuine alignment?

*And how do we find the prospects
we overlooked?*



Hello!



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Data Strategy (PODS) at **Pomona College**



Reactive prospecting → relationship intelligence

Before

- Prospect visibility varied by team and portfolio
- Qualification = reactive
- Capacity, relationships, and giving history drove strategy
- Affinity info lived in gift officer knowledge and scattered records
- Limited institution-wide view of long-term opportunity

After (and onward!)

- Screening across the constituent universe
- Prospect pyramid across gift levels
- Repeatable qualification / requalification
- External + institutional affinity signals
- Research, prospect management, analytics, and data connected
- Intelligence informs campaign and resource decisions

The infrastructure behind the work



Prospect Research

Evidence
Due diligence
Capacity
Relationships



Prospect Management

Assignments
Portfolios
Pipeline
Strategy



Data Administration

Governance
Hygiene
Request intake
CRM integrity



Analytics

Dashboards
Segmentation
Models
Self-service insight

Prospect intelligence at Pomona College

CAPACITY

Can they give?

PROPENSITY

Are they philanthropic?

AFFINITY

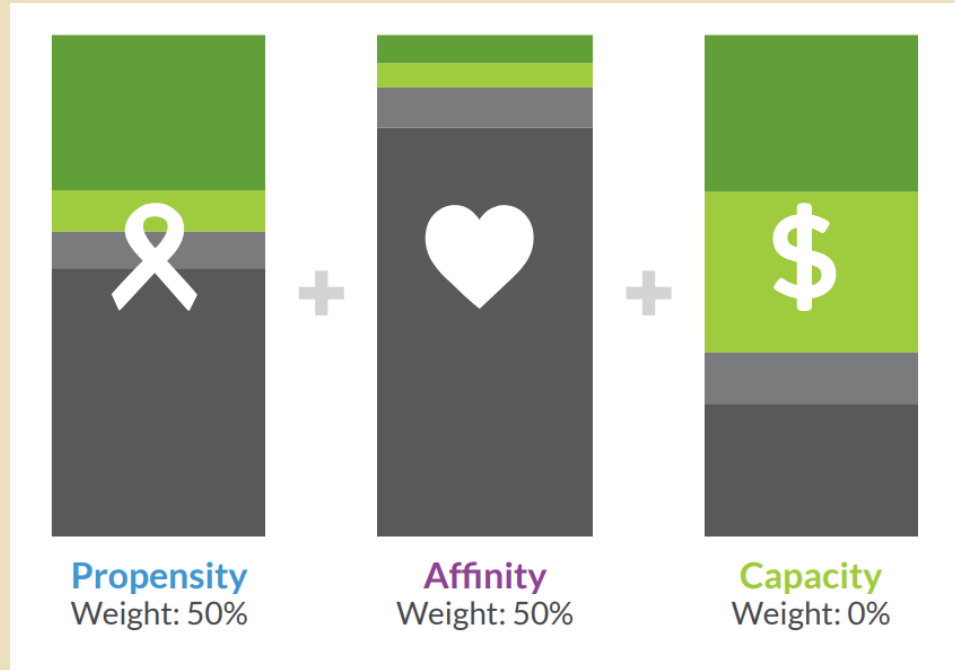
Why might they give?

RELATIONSHIP

How do we move?

iWave / Kindsight + CRM data + AI-assisted synthesis + Researcher judgment

Our iWave Score was intentionally NOT a wealth score



Step 1: Build the prospect pyramid



74,147

Records screened

\$9B

Total estimated capacity

485K+

External donations identified

Screening creates a first prioritization layer

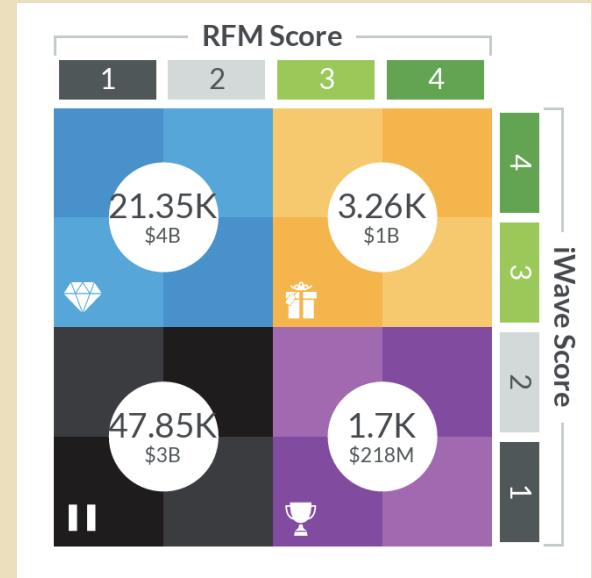
iWave Score	Prospects	Share of Screened
4 – Strong	7,239	10%
3 – Good	17,364	23%
2 – Fair	10,297	14%
1 – Weak	39,247	53%

24,603 prospects scored 3 or 4...still not a research queue.



Making sense of the insights

Group	Count	Research Meaning
Hidden Gems High iWave + Low RFM	21,345	Capacity + giving to other nonprofits
Distinguished High iWave + High RFM	3,258	Major donors to your cause; possibly more capacity
Not Now Low iWave + Low RFM	47,848	Do not appear philanthropic with nonprofits
Champions Low iWave + High RFM	1,696	Donate to your cause; not on radar elsewhere



Surfacing hidden gems

74,147

SCREENED RECORDS

Starting universe

21,345

HIDDEN GEMS

High iWave / low RFM

19,761

UNASSIGNED HIDDEN GEMS

No assigned solicitor

4,317

\$250K+ EST. CAPACITY

Unassigned Hidden Gems

461

\$1M+ EST. CAPACITY

Priority for deeper research

Step 1.5:
What is iWave
seeing that
Pomona
hasn't?



Screening is not a one-time exercise.

2023 versus 2026 screening results



Upgraded

Capacity materially grew
→ new gift level / strategy



Newly Visible

Did not surface in 2023 →
refreshed data brought
them forward



Loyal, Under-Engaged

Events / participation
despite limited response
→ engagement tells a
fuller story



Prematurely Disqualified

Written off under prior
assumptions → today's
evidence may differ

Step 2:
Turn scores
into defensible
research.



The question capacity cannot answer

Traditional starting point

Capacity
Relationships
Giving history

The missing question

What does this prospect actually care about?



Two affinity lenses are stronger than one

External affinity with iWave

Does external behavior suggest alignment with Higher Education/Education?

- External giving
- Similar nonprofit involvement
- Foundation / board affiliations
- Cause-level patterns



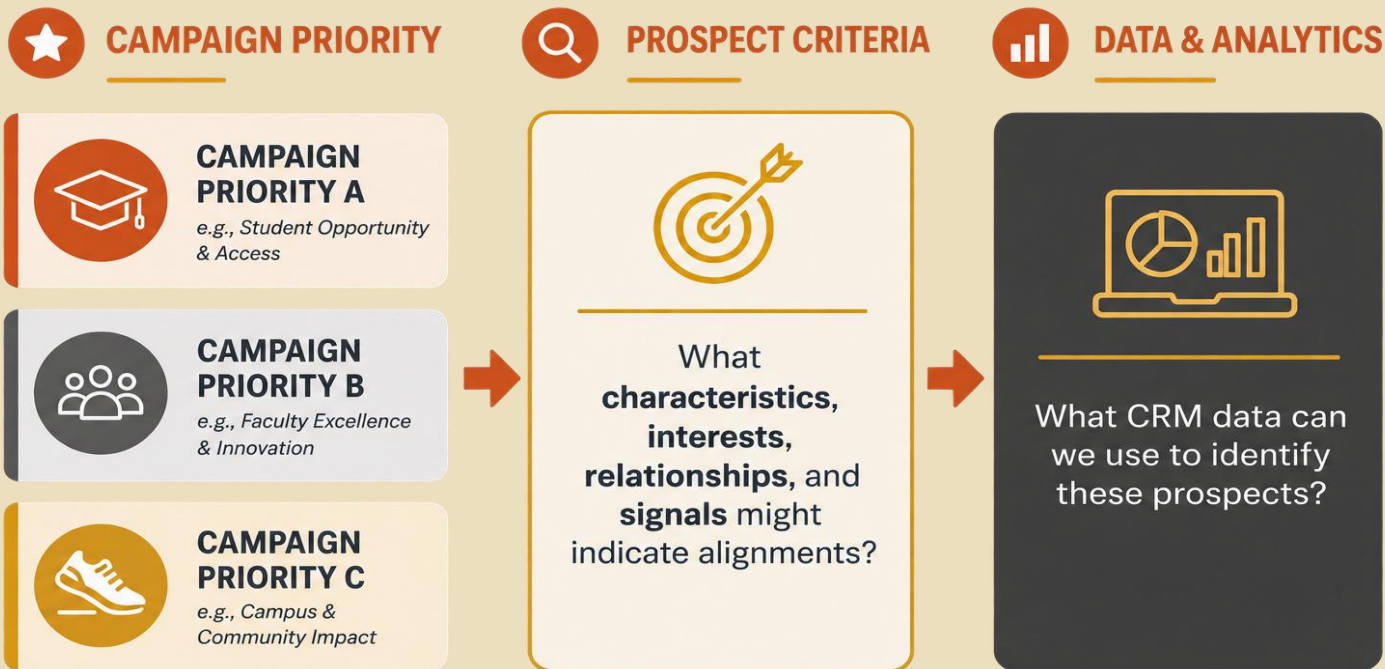
Internal / inferred affinity at Pomona

What specifically appears to matter here?

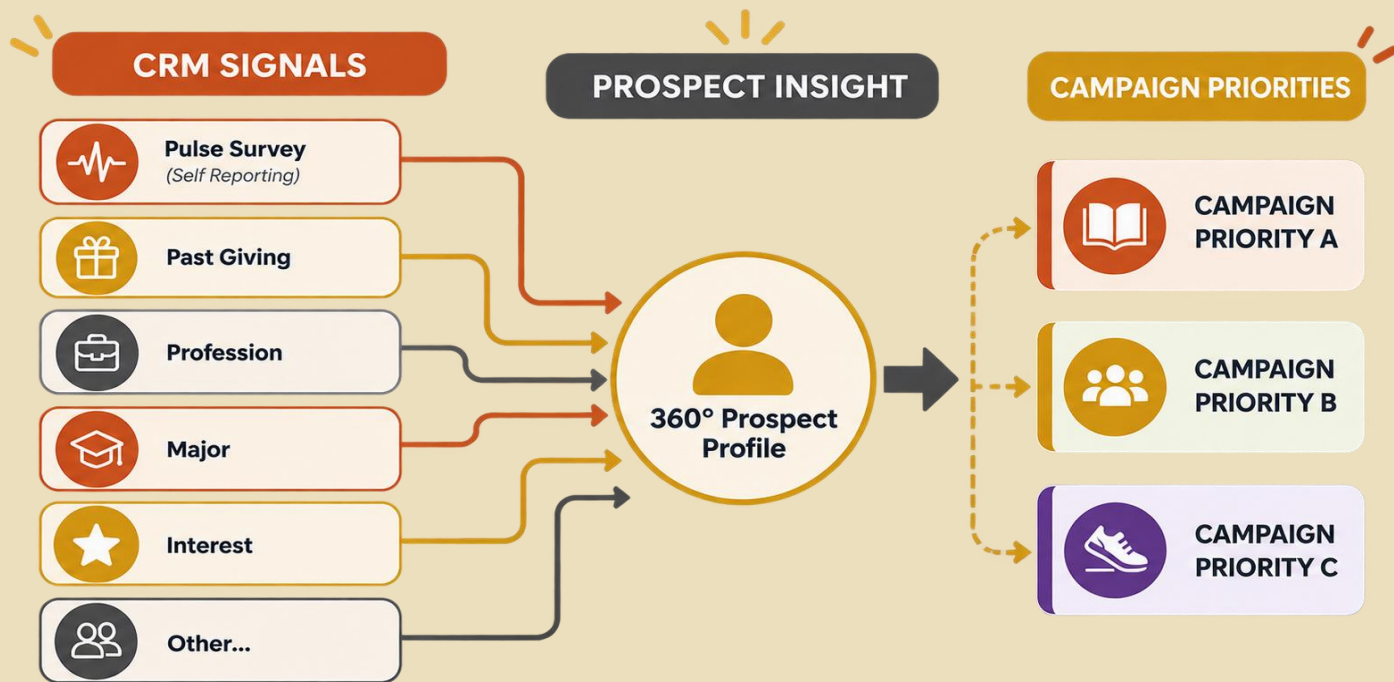
- Giving history
- Contact reports
- Survey responses
- Profession / major / activities
- Volunteerism / relationships

iWave affinity gets us to general cause fit. Internal institutional intelligence gets us to campaign fit.

Translate strategy into data



Mapping CRM signals



AI helps scale the messy middle

2,000+ GIFT FUNDS

Use phrase- and context-based matching to map fund designations to campaign initiatives while excluding generic or incidental matches.

CONTACT REPORT HISTORY

Analyze the full prospect history collectively; recurring themes count more than isolated references; documented changes matter.

SURVEYS / OTHER SIGNALS

Synthesize structured and unstructured institutional evidence into prospect-level affinity indicators.

Put some weight in the evidence

AFFILIATION		WEIGHT
	Pulse Survey (Self Reporting)	3
	Past Giving	3
	Contact Report	3
	Profession	2
	Involvement	2
	Board Membership	2
	Major	1
	Interest	1

Affinity → fundraising priorities

Prospect	 Campaign Priority A	 Campaign Priority B	 Campaign Priority C	 Campaign Priority D	 Campaign Priority E	 Campaign Priority F	 Campaign Priority G	 Campaign Priority H
1234567	3	4	0	0	3	0	0	0
1234568	6	0	1	0	3	0	0	0
1234569	0	3	3	0	3	8	0	0
1234570	1	1	5	0	5	0	0	3
1234571	3	0	3	0	3	2	0	0
1234572	3	0	3	0	0	5	0	0
1234573	3	0	2	0	0	5	0	0
1234574	3	0	0	0	0	5	0	0
1234575	3	0	0	0	0	5	0	0
1234576	0	0	2	0	3	2	0	0
1234577	6	0	0	0	0	8	0	0
1234578	3	0	6	0	0	5	0	0
1234579	5	0	0	2	2	0	0	0
1234580	0	2	3	3	0	5	0	0

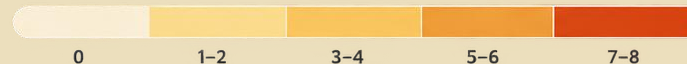
Affinity Classification

 **Developing Affinity**
Scoring 1 – 3

 **Emerging Affinity**
Scoring 4 – 6

 **Strong Affinity**
Scoring 7 and above

Score Intensity



Ex: Prospects with “Emerging Affinity”

CAPACITY LEVEL	DESCRIPTION	EMERGING AFFINITY PROSPECTS (SCORE 4-6)	% OF ALL EMERGING AFFINITY PROSPECTS
 Principal \$1M+	Prospects with capacity and propensity for gifts of \$1 million or more	255	4.5%
 Major Gifts \$100K-\$999K	Prospects with capacity and propensity for gifts of \$100,000 to \$999,999	2,420	43.2%
 Leadership Annual Gifts \$5K-\$99K	Prospects with capacity and propensity for gifts of \$5,000 to \$99,999	1,966	35.0%
 Lower Capacity \$4,999 and below	Prospects with capacity of \$4,999 and below, and unrated	965	17.2%
TOTAL		⇒ 5,606 ⇐	⇒ 100% ⇐

“Emerging Prospects” by affinity & capacity

CAMPAIGN PRIORITY	 PRINCIPAL \$1M+	 MAJOR GIFTS \$100K–\$999K	 LEADERSHIP ANNUAL GIFTS \$5K–\$99K	 LOWER CAPACITY \$4,999 AND BELOW	 TOTAL EMERGING AFFINITY PROSPECTS (SCORE 4–6)
Campaign Priority A	17	105	191	44	357
Campaign Priority B	3	91	108	35	237
Campaign Priority C	87	914	1,275	282	2,558
Campaign Priority D	9	16	21	6	52
Campaign Priority E	4	21	20	13	58
Campaign Priority F	14	89	104	33	240
Campaign Priority G	–	2	1	0	3
Campaign Priority H	2	11	19	7	39
Campaign Priority I	19	84	103	29	235
Campaign Priority J	1	1	0	0	1
Campaign Priority K	11	29	51	12	103
Campaign Priority L	10	37	48	20	115
Campaign Priority M	–	1	1	2	4
Campaign Priority N	34	285	530	166	1,015
Campaign Priority O	–	–	2	0	2
Campaign Priority P	–	–	–	–	0
TOTAL EMERGING AFFINITY PROSPECTS (SCORE 4–6)	255	2,420	965	5,606	 5,606 

Does this work?



Organizational impact

61 → 88

TOTAL ADVANCEMENT STAFF
2020 → 2026

13 → 25

FRONTLINE FUNDRAISERS
2020 → 2026

3 → 6

PROSPECT DEVELOPMENT
2020 → 2026

+44% total advancement growth

New teams: Family Giving + Complex Assets & Principal Gifts

After the score: additional research

The iWave screening export contains 200 columns. These are high-value variables to TEST, not statistically proven predictors.

CAN THEY GIVE?

- Est. Capacity Value
- Properties Total Value / Count
- Business Affiliation + Sales Volume
- SEC Insider
- Capacity Insider / Financial / HNW

DO THEY GIVE?

- Propensity Rating
- Donations Count / Total Value
- Private / Public Foundation Board
- Political giving as context

WHAT DO THEY CARE ABOUT?

- Affinity Rating
- Primary / Secondary Affinity
- Cause-specific donation counts + values
- Higher Education giving

WHAT IS OUR RELATIONSHIP?

- RFM Score + Recency / Frequency / Monetary
- Total Gift Count / Amount
- Largest + Last Gift
- Assignment / prospect stage

Building research queues

Segment	Description	Next Step
HIDDEN GEMS	High iWave + low RFM + meaningful capacity	Qualification/discovery
CAUSE-AFFINITY OUTLIERS	Strong cause-specific giving + weaker overall rating	Affinity verification
UNDER-ESTIMATED WEALTH	High propensity/affinity + modest capacity + complex wealth signals	Deep wealth research
REQUALIFICATION	Old DQ / low priority + new engagement, velocity, capacity or giving	What changed?
PLANNED-GIFT GEMS	High Planned Giving Score + loyalty + less obvious liquid wealth	Planned giving review
ACCESS-RICH	Strong profile + connections / foundation-board evidence	Relationship mapping

Leaving no stone unturned: the full intelligence engine



Visibility → evidence → alignment → decisions



Leaving no stone unturned ≠
researching everyone.
It means designing multiple
ways for *overlooked
prospects to surface.*



Thank you.



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