Welcome to
KINDFEST
2026
KindCon

Research & Analytics lightning round

Integrating iWave live profiles into custom Analytics & Lightning Reports for prospect segmentation

KindCon 2026

Mattie Snell

Director of Portfolio Strategy & Research
Texas A&M Foundation

KindCon 2026

TEXAS
A&M
FOUNDATION
TEXAS A&M FOUNDATION

1M+

Constituent & Organization Records

630,000+ living Former Students

~70

Frontline Fundraiser Portfolios

Target Portfolio Size of 50

6

Portfolio Strategy & Research Team Members

3 Analysts, 2 Researchers, 1 Director

Perscriptive portfolios, make light work… for the fundraiser.

ascend, a one stop shop for fundraisers and prospecting teams.

Tools we leverage

LexisNexis & RocketReach

Basic contact and demographic information

iWave & WealthEngine

Prospect segmentation and scoring

Blueridge & Donor Watch

Capacity and wealth verification

Altrata

UHNW identification and verification

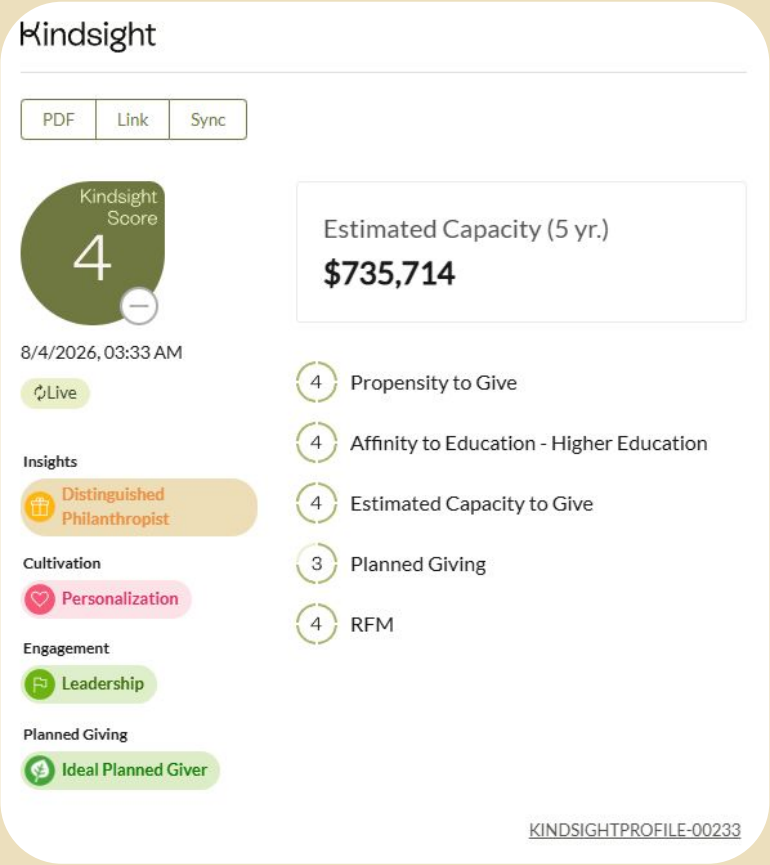
Average Joe/Jane → **Principal Donor**

Live Profiles

February 2026 – Integrated Live Profiles

412,971 records screened

3% with a capacity of $250K+



Say goodbye to your tabs and spreadsheets.

LIVE DEMO

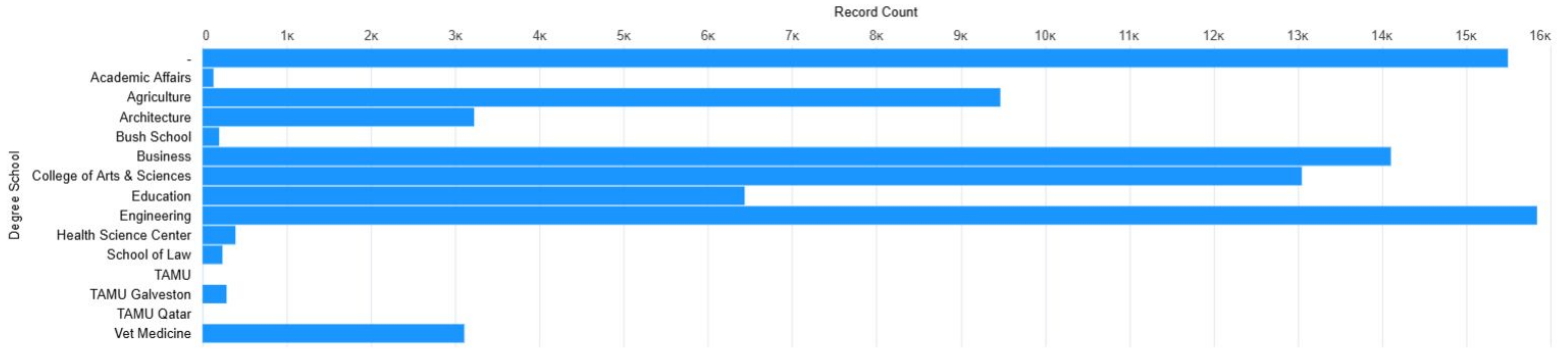
Report: Bio Extracts

Prospecting Template

Analyze | Enable Field Editing | Edit

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records	Total Age	Total Kindsight Score	Total WE Wealth Score	Total Kindsight Est. Capacity	Total Kindsight Capacity Score	Total WE Total Gift Capacity Actu...	Total Kindsight Affinity Score
81,982	4,988,929	108,576	6,592,810	$6,615,068,373	107,383	$15,133,834,712.00	71,041



Degree School	Preferred Address County	Donor Id	Name With Degree	Age	Kindsight Score	WE Wealth Score	Kindsight Est. Capacity	Kindsight Capacity Score	WE Total Gift Capa
- (15497)	- (40)	[redacted]		71	2	95	$152,159	2	
				66	0	95	$0	0	
				74	0	95	$0	0	

Row Counts | Detail Rows | Subtotals | Grand Total

INCLUDE ROWS MATCHING

(1 OR 2) AND 3 AND 4 AND 5 AND (6 OR 7) AND 8 AND (9 OR 10)

1. Kindsight Capacity Score greater or equal "100,000"
2. WE Total Gift Capacity Actual Value greater or equal "$100,000.00"
3. Is Deceased equals false
4. Preferred Address State equals texas, tx
5. Service Indicators does not contain do not contact, hostile
6. Days Since Last Contact greater or equal 730
7. Days Since Last Contact equals 0
8. Has Active Opp equals false
9. Days Since Last Contact Attempt greater or equal 90
10. Days Since Last Contact Attempt equals 0

The Map Prospecting Tool ▾ My Views ▾

The Map Prospecting Tool

Map Filters

To U.S. Map

Number of Prospects 799,713

Preferred Address City
All

Affinity

Preferred School
All

Preferred Major
All

Constituent Type Text
All

Most Supported Unit
All

Veteran
All

Is Corps
All

Highest Degree
All

Capacity

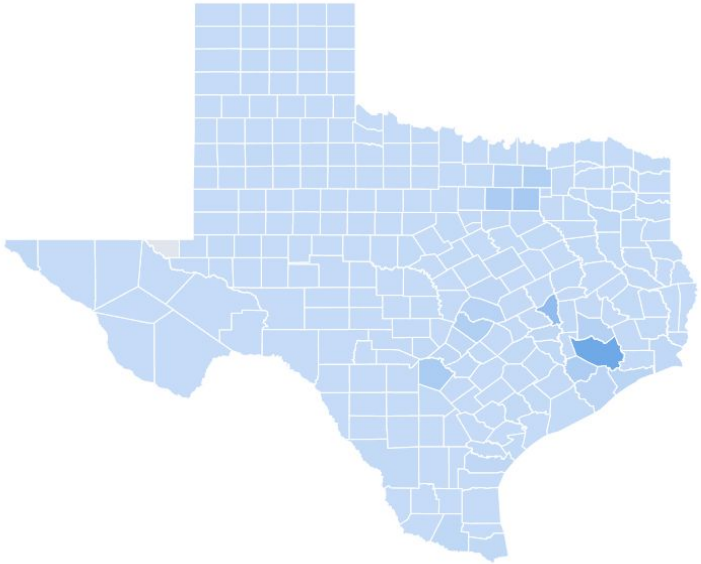
MG EVI Score
All

Net Worth
All

Kindsight Score
All

Estimated Total Giving Capacity
All

Kindsight Profile Segment
All



A
1
123K

Stoplight
All

Research Recommended

Portfolio Strategy Referral

#	Donor ID	Full Name	Preferred Address City	Preferred Address County	Preferred Phone	Email	Degree Year	Total Overall Credit	Preferred Major	Total Credit Fo
1	29609	[redacted]	Rosenberg	Fort Bend	[redacted]		0	500	-	
2	22777		Fort Worth	TARRANT			1970	6,005	Chemical Engineering	
3	30294		Sebastian	Willacy			0	0	-	
4	30301		Sulphur Springs	Hopkins			0	0	-	
5	30596		-	-			0	0	-	
6	28431		Los Altos Hills	Santa Clara			0	4,000	-	
7	30608		San Marcos	HAYS			0	25	-	

Overview | **Constituent Details** | Prospect Management | WealthEngine | More

Giving Details | **Constituent Briefing** | Names | Salutations | More

Executive Summary ✦

Generate Brief

Task
Reach Out

Name | Related To

Details | Related

Task Information

Name	Related To
Assigned To: Mattie Snell	Organization
Type: Portfolio Strategy Referral	Academic Organization: Texas A&M Foundation
Subject: Reach Out	Preferred Phone Number
Due Date: 9/4/2026	Preferred Email
Donor ID	Project of Interest

Rationale
Portfolio Strategy Referral

Comments
Affinity:
Priority:
Capacity:
Timing:

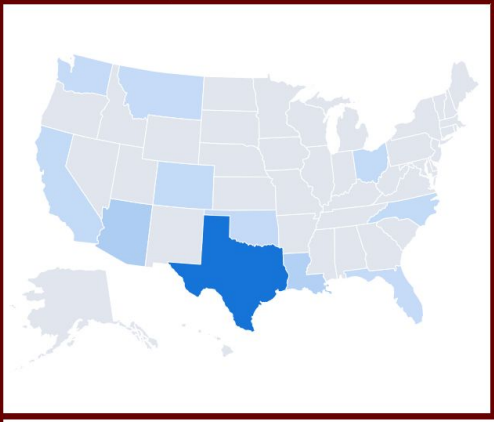
DO
Adam Quisenb

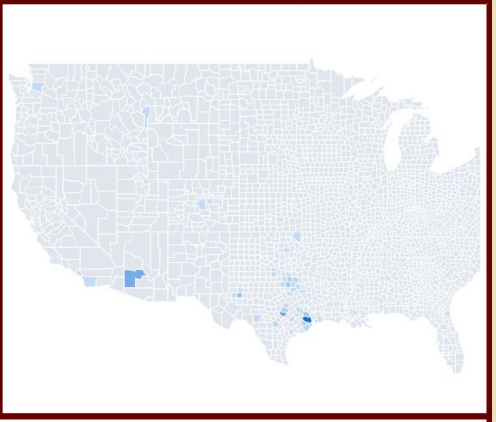
Fiscal Year
2027

Fiscal Quarter
Q1

My Portfolio | My Contacts | Trip Planner | More

Portfolio | Qualification Pool - Contact Attempts | Qualification Pool - Contact Reports | Stewardship





Active Portfolio Opportunities

Days in Stage	0-90 Days	91-180 Days	181-365 Days	+1 Year

Most Recent Substantive Contact with No Active Opportunity

DSLC	0 - 6 mos.	6 mos. - 1 yr.	1 yr. - 2 yrs.	+2 yrs.

Open Tasks

Task Type	Portfolio Strategy Referral	-

Contact Attempts

Attempt Count	1 - 3	4 - 6

Stewardship Assignments

DSLC	0 - 6 mos.	6 mos. - 1 yr.	1 yr - 2 yrs

LINK TO PROSPECT TOOL

Q&A

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CASE Engagement Made Easier

Julie Domel
Trinity University

What is CASE Engagement (AEM)?

- AEM = Alumni Engagement Metrics
- Measures fiscal year just completed.
- Similar to the VSE in that it is a survey, but for alumni engagement activity.
- Full or minimal version. Full asks for engagement by cohorts by graduation year and degree.
- Involves these metrics:
    - Philanthropic (P) – Have they made a gift?
    - Volunteer (V) – Board members; club/chapter officers; classroom speakers; interviewed for alumni magazine, etc.

What is CASE Engagement (AEM)?

- Metrics (cont.)
  - Experiential (E) – Have they attended an event or had a personal visit with staff?
  - Communication (C) – Have they communicated with the university, e.g., clicked on emails, registered for events, sent in class notes, filled out a survey or other form?
- Measures degreed and non-degreed alumni.
- To count, alumni only need to have one action per category.

AEM and ARM (fka Affinaquest)

- Engagement scoring functionality not robust enough for a real score, but because you only need one instance in a category, it works for AEM.
  - Relates to the number of scoring rules you have per object.
  - Overwrites rather than adds.
- Data at the Contact level

Engagement

Volunteer	1	Philanthropic	1
Experiential	2	Communications	1
		Total Engagement Score	5

AEM and ARM (fka Affinaquest)

- Create the following:
  - Campaigns for Comms – Email clicks, Forms completed, ThankView clicks
    - If you are storing responses to your campaigns in AQ, use that, but we don't, so we upload monthly to buckets.
    - Limitations of buckets > Measure contacts who have at least one engagement, not number of engagements, but we don't need that for AEM.
  - Summary for cash-in-the-door transactions for Current FY
  - Engagement Scoring Rules
    - Note: Filters have a max length.
  - Communication Style field on Event to track In-Person, Hybrid, and Virtual events.

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Engagement Scoring

* Engagement Scoring Rule Name: Email Clicks

Description:

* Category: Communications

* Score: 1

Active: ☑

* Level: Contact

* Object: Campaign Member

Custom Object: ☐

Filter Helpers

Field	Operator	Value	
--None--	Equal to		Add Filter

Rule

```
CampaignId = '701Ub00000uu3MOIAY[FY27 Email Clicks]' OR CampaignId = '701Ub00000utJ1oIAE[FY27 ThankView Clicks]'
```

Test Rule

To change the score value to a lower number on an active rule, users must run the EngagementScoringResetBatch.

Save and Run | Cancel

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Engagement Scoring

* Engagement Scoring Rule Name	Alumni Club Volunteers	Description			
* Category	Volunteer	* Score	1	Active	☑
* Level	Contact	* Object	Volunteer Position	Custom Object	☐

Filter Helpers

Field	Operator	Value	
--None--	Equal to		Add Filter

Rule

(AQB__Volunteer_Position__c = 'TU ALBUQUERQUE ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU AUSTIN ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU ATLANTA ALUMNI CHAPTER' OR AQB__Volunteer_Position__c = 'TU BAY AREA ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU CHICAGO ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU DENVER ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU HOUSTON ALUMNI CHAPTER BD' OR AQB__Volunteer_Position__c = 'TU KANSAS CITY ALUM CHAP BD' OR AQB__Volunteer_Position__c = 'TU SOU CALIFORNIA ALUM CHAP BD' OR AQB__Volunteer_Position__c = 'TU NATIONAL CAPITAL AREA ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU NEW ENGLAND ALUM CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU NEW YORK ALUMNI CHAP BD' OR AQB__Volunteer_Position__c = 'TU NORTH TEXAS ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU PHOENIX ALUMNI CHAP BD' OR AQB__Volunteer_Position__c = 'TU PORTLAND ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU Salt Lake City Alumni Club' OR AQB__Volunteer_Position__c = 'TU SAN ANTONIO ALUMNI CHAP BD' OR AQB__Volunteer_Position__c = 'TU SEATTLE ALUMNI CHAPTER BD' OR AQB__Volunteer_Position__c = 'TU ST LOUIS ALUMNI CHAPTER BOARD' OR AQB__Volunteer_Position__c = 'TU WASH DC ALUMNI CHAP BD') AND Current_FY_Volunteer__c = true

Test Rule

Create a report – We use Apsona

- Multi-step report
- Contactable alumni based out of the Education object
  - If you complete the VSE, you will need to use comparable filters.
  - Have a phone or address or email and are not Do Not Contact.
  - Include a field for degreed/non-degreed.
- Pull Experiential, Volunteer, Philanthropic, and Comms scores off Contact
- Create calculated fields for E, V, P, and C that convert any score to a value of 1.
  Example: E = {!Engagement Scores.Contact.Experiential} > 0 ? 1 : ""

Create a report – We use Apsona (cont.)

- Create calculated fields for the combinations asked for by AEM (All, Any, P Only, Not P, etc.)
  Example: C and P = {!Engagement Scores.Contact.Philanthropic} > 0 && {!Engagement Scores.Contact.Communications} > 0 ? 1 : ""
- Push report into Tableau or other analysis software and use crosstabs to get your totals.

Experiential (E)	
Undergraduate Degree	2,298
No Degree	52
Total	2,350

CASE Engagement FY26

Legally Contactable

Undergraduate Degree	27,513
No Degree	3,009
Total	30,522

Experiential (E)

	Current FY		FY25		FY24	
Undergraduate Degree	2,298	8.35%	2,203	8.09%	1,700	6.29%
No Degree	52	1.73%	39	1.33%	20	0.69%
Total	2,350	7.70%	2,242	7.43%	1,720	5.75%

Volunteer (V)

	Current FY		FY25		FY24	
Undergraduate Degree	626	2.28%	703	2.58%	403	1.49%
No Degree	3	0.10%	5	0.17%	2	0.07%
Total	629	2.06%	708	2.35%	405	1.35%

Philanthropic (P)

	Current FY		FY25		FY24	
Undergraduate Degree	3,728	13.55%	3,673	13.49%	3,745	13.86%
No Degree	77	2.56%	77	2.62%	52	1.80%
Total	3,805	12.47%	3,750	12.43%	3,797	12.69%

Communication (C)

	Current FY		FY25		FY24	
Undergraduate Degree	13,175	47.89%	8,008	29.41%	6,556	24.26%
No Degree	721	23.96%	238	8.09%	245	8.46%
Total	13,896	45.53%	8,246	27.33%	6,801	22.73%

P Only

	Current FY		FY25		FY24	
Undergraduate Degree	830	3.02%	1,106	4.06%	1,306	4.83%
No Degree	26	0.86%	46	1.56%	27	0.93%
Total	856	2.80%	1,152	3.82%	1,333	4.45%

Not P

	Current FY		FY25		FY24	
Undergraduate Degree	10,452	37.99%	5,700	20.93%	4,681	17.32%
No Degree	675	22.43%	212	7.21%	228	7.87%
Total	11,127	36.46%	5,912	19.60%	4,909	16.40%

All

	Current FY		FY25		FY24	
Undergraduate Degree	258	0.94%	318	1.17%	195	0.72%
		0.00%	2	0.07%	0	0.00%
Total	258	0.85%	320	1.06%	195	0.65%

Any

	Current FY		FY25		FY24	
Undergraduate Degree	14,180	51.54%	9,373	34.42%	8,426	31.17%
No Degree	752	24.99%	289	9.82%	280	9.67%
Total	14,932	48.92%	9,662	32.03%	8,706	29.09%

V, E, or C (maybe P)

	Current FY		FY25		FY24	
Undergraduate Degree	13,350	48.52%	8,267	30.36%	7,120	26.34%
No Degree	726	24.13%	243	8.26%	253	8.74%
Total	14,076	46.12%	8,510	28.21%	7,373	24.64%

Also...

- Engagement scoring in AQ is only for the current year.
  - AEM opens late in the year, so you will need to run your final reports at the end of your fiscal year and save them.
  - Archive your scores before you reset for the new fiscal year
- Make sure that you have the engagement scoring caps set. Documentation is available from the support site.
- Any changes to rules that lower scores require running the Engagement ScoringResetBatch
- Both the Reset Batch and the Archive Batch jobs can be run from the Apex Launcher on Affinaquest Setup

One more thing...

- AEM also asks for:
  - Alumni Counts – Living, Opted-Out, Legally Contactable
  - Event and attendee counts with a breakdown of virtual/hybrid/in-person
  - Optional data on staffing, budgets, software used, etc.

Thank you.

www.kindsight.io

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Thank you.

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