




# Welcome to Bloomerang Academy

Thank you for joining us!

Please tell us where you are joining us from and what the weather is like where you are...drop it in the CHAT!



# Housekeeping

**Live Transcript**

We all know what we want to do is spend  
administration and more time Doing the w

Hide Subtitle

View Full Transcript

Subtitle Settings...



Chat



Raise Hand



Q&A



Live Transcript

**Share ideas**

**Ask questions**

# Housekeeping

Our dial in number in case you need it today: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to [support@bloomerang.com](mailto:support@bloomerang.com). Our support team is amazing!

# Bloomerang + Donorsearch: Maximizing Capital Campaign Success



# Meet Your Presenter

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- Joined DS in 2015, VP of Strategic Partnerships
- 10 years in fundraising
- University of Maryland Alumni



# DONORSEARCH

Maximizing Capital  
Campaign Success

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Presented by: Brandon Lyons  
Hosted by: Bloomerang





# ABOUT DONORSEARCH

Established 2007



Family Owned Business



850+ Data Points 248 Mil+  
Individuals



12,000 + Clients



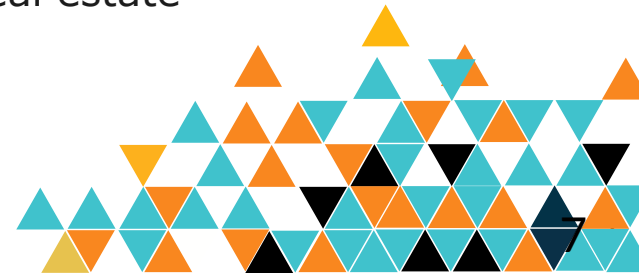
Largest Philanthropic Database



AI/ML support for  
nonprofits of all sizes



Ultra high net worth & Core  
Logic real estate



# Agenda

- 
- **Entering Into Campaign Mode**
  - **Silent Phase Preparation**
  - **Public Phase To Dos**
  - **Live Demonstration**



## Planning Stage

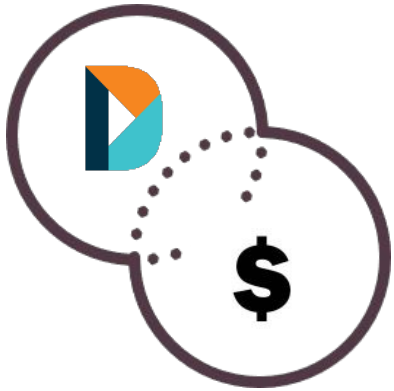
- **Why Are We Going Into A Capital Campaign?**



- **Clear and Concise Messaging**
- **Helps determine who will support the campaign**
- **Heavily influences the campaign goal**



## Setting A Goal



### Feasibility

Remain Realistic



### Time Frame

When and How  
Long



### Brainstorm

The time to be  
creative is now



# Feasibility Study

STEP

1

## Identify

What is our  
current  
constituency?

STEP

2

## Measure

- What is the capacity of our current constituency?

STEP

3

## Create Buckets

- Foundation/  
Corporations
- Individuals

# Feasibility Study

## Database Analysis

### Understanding What Is Possible

Raised	Name	City	Engagement Level
<b>TOTALS</b>			
\$620,745.00			
\$160,000.00	Environmental Protection Agency	Washington	Cold
\$150,000.00	James S Irsay	Carmel	Cold
\$40,000.00	Bruce Wayne	Gotham	Cold
\$30,000.00	Michael J bronson	crofton	Cold
\$30,000.00	Elizabeth Mievaldis Lemon	New York	Cold
\$20,000.00	Michael J bronson	crofton	Cold
\$20,000.00	Will and Belinda Grapes Foundation	Dunkirk	Cold
\$17,000.00	Kevin A Plank	Lutherville Timonium	Cold

# Feasibility Study

## Database Analysis

### Understanding What Is Possible

#### Executive Analysis

##### Main Details

Analysis Date	Jul 08, 2024
Batch Name	DemoDataIDP (edited)
Records Reviewed	204

##### Client Reported Data

Most Recent Gift	2013
Earliest Gift	1999
Giving Span	15 years
Total Giving	\$3,969,583

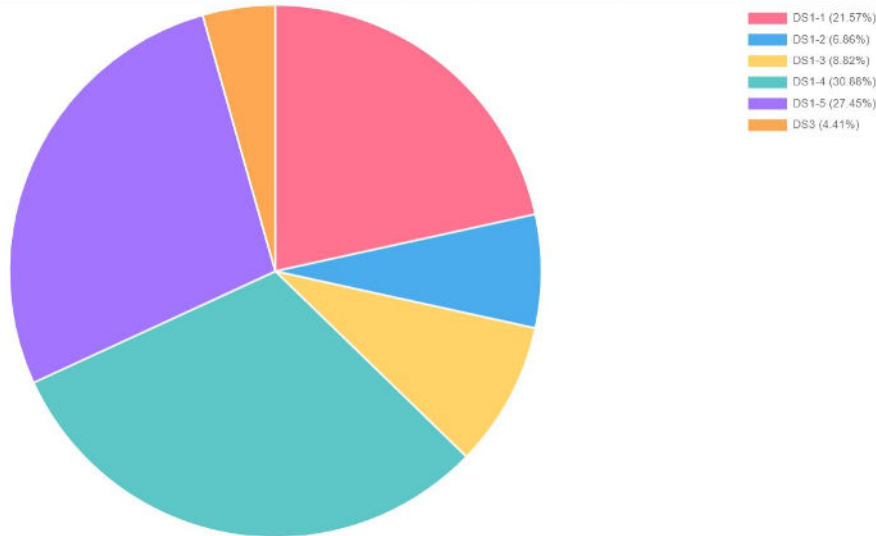
##### Total Likely Giving

Charitable	\$24,008,774 (2,397 gifts)
Political	\$3,111,067 (2,440 gifts)

##### Opportunity <sup>(1)</sup>

Total Opportunity	1 to 7
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#### DS Ratings Breakdown



This chart visualizes the breakdown of your file based on our DS Rating system. DS1-1 through DS1-3 are considered major gift prospects based on external markers. Your file has approximately 37% major gift opportunity.

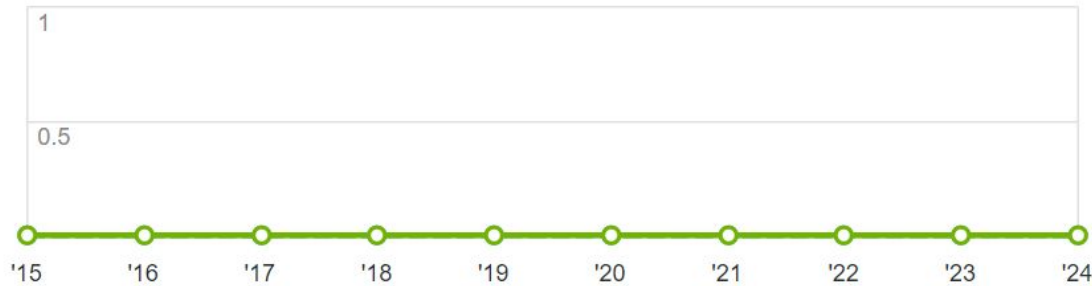
# Silent Phase

## Giving Summary

Revenue

Raised

Soft Credits



### Lifetime

\$20,000.00

\$20,000.00

### Average

\$5,000.00

\$20,000.00

### First Transaction

\$20,000.00 9/5/2012

### Latest Transaction

\$5,000.00 12/5/2013


### Largest Transaction

\$20,000.00 9/5/2012

## Corporations and Foundations


- Foundations and Corporations are key institutions for reaching our goals
- Help to close large gaps
- Can take longer to realize

# Silent Phase



**Mark A Cuban**  
#524

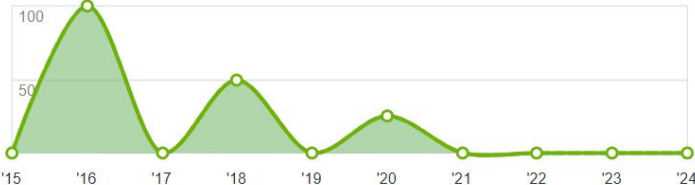
**Address**  
5424 DeLoache Ave  
Dallas, TX 75220



**Summary** Profile Timeline Relationships

**Giving Summary**

Revenue Raised Soft Credits




Year	Revenue
'15	~10
'16	100
'17	~10
'18	~50
'19	~10
'20	~30
'21	~10
'22	~10
'23	~10
'24	~10

**Lifetime** **Average**  
\$250.00 \$250.00 \$62.50 \$62.50

**First Transaction** **Latest Transaction**  
\$75.00 10/29/2013 \$25.00 2/27/2020

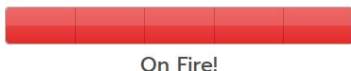
**Largest Transaction**  
\$100.00 10/29/2016

**Engagement Level**



Cold

**Generosity**



On Fire!

[View Generosity Details](#)

Relationships

## Individuals

- Individuals make large gifts too
- Can possess multiple philanthropic vehicles
- Will require interviews or face-to-face meetings to secure these gifts

# Silent Phase



Mark A Cuban  
#524

Address  
5424 Deloache Ave  
Dallas, TX 75220



Summary

Profile

Timeline

Relationships

## Generosity Details

 Update

Back

View in DonorSearch

Largest Charitable Gift  
\$1,000,000 - \$5,000,000

Wealth Capacity  
\$10,000,000 - \$100,000,000

Has Business Affiliation  
Yes

Constituents Screened  
Mark Cuban

Profile Accuracy  
High

Annual Fund Likelihood  
High

Major Gift Likelihood  
High



# Silent Phase

Landmark Theatre Corp  
(Los Angeles, CA)

Mark Cuban  
Partner

✉ [markc@landmarktheatres.com](mailto:markc@landmarktheatres.com)

Est. 1974

Credit Level: A+ (Excellent)

[Landmark Theatre Corp](#) ▼

2222 S Barrington Ave  
Los Angeles, CA  
90064-1297

[www.landmarktheatres.com](http://www.landmarktheatres.com)

☎ (310) 473-6701

📠 (310) 312-2351

Parent Company

Landmark Theatre Corp

\$47,431,000



[View More Details...](#)

More Details

Years In Business: 10 or More Years

Number Of Employees: 836

Description

- Business Management
- Motion Picture Theaters (except Drive-Ins)
- Movie Theatres
-

Mark Cuban Foundation ▾  
 PO BOX 12388  
 DALLAS, TX 75225  
 EIN: 260063142  
 Phone: (214) 696-2133  
 Website:  
<http://WWW.FALLENPATRIOTFUND.ORG>

Year	Name	Title	Assets Year Start	Assets Year End	Grants Paid	Grants Approved
2017	Mark Cuban ▾	PRESIDENT	\$27,354,913	\$26,587,278	\$1,535,642	\$1,535,642
2016	Mark Cuban ▾	President	\$26,112,318	\$27,354,913	\$1,392,156	\$1,392,156
2015	Mark Cuban ▾	President	\$27,039,388	\$26,112,318	\$1,255,301	\$1,255,301

Show 10 entries

Search:

Year	Recipient	Purpose	Amount
2017	Center For Competitive Democracy ▾	Texas Voter Choice Project	\$700,000
2018	American Civil Liberties Union Aclu Foundation Inc ▾	GENERAL SUPPORT	\$250,000
2018	Dallas Foundation Texas 2036 ▾	GENERAL SUPPORT	\$250,000
2018	Electronic Frontier Foundation ▾	GENERAL SUPPORT	\$250,000
2017	Code Org ▾	General Support	\$250,000
2016	Code Org ▾	See attachment	\$250,000
2016	Special Olympics World Games ▾	See attachment	\$250,000



## Public Phase



### The Hard(er) Part

- This is where a large number of your individual donors come into play
- These will be smaller gifts typically
- Still large gifts to come
- Continue securing funds from silent phase pledges

## Public Phase

### Let Them See You Shine!



- Galas, Canvassing, appeals, etc.
- Corporations come back into play as well
- Who's attended events previously
- What new faces do we want to see?

# Public Phase

## Segment Further

Constituent Filters

Include DS-Rating is 'DS1-1', 'DS1-2', 'DS1-3', 'DS1-4', or 'DS1-5'

Constituent

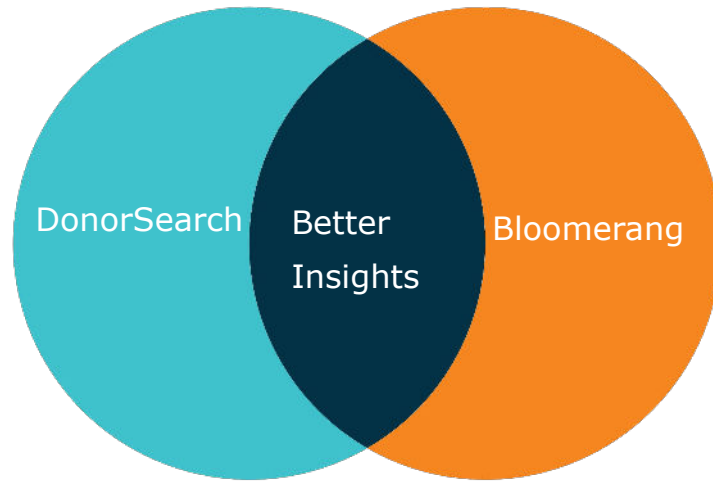
DS-Rating is

Name	DS-Rating	Largest Gift Fou...	Annual Fund Lik...	Capacity Range...	Largest Gift Fou...	Lifetime Raised
<b>TOTALS</b>						
		\$25,171.00	9496		\$15,302.00	\$0.00
Elwood Rasmuson	DS1-4	\$499.00	300	H - \$25	\$100.00	\$0.00
Eleanor Reese	DS1-4	\$251.00	297	F - \$100	\$250.00	\$0.00
Edward Riecker	DS1-4	\$1,500.00	300	G - \$50	\$1,500.00	\$0.00
Douglas Riga	DS1-4	\$0.00	300	F - \$100	\$0.00	\$0.00
Douglas Risser	DS1-4	\$1,501.00	300	F - \$100	\$1,500.00	\$0.00
Douglas Romanowski	DS1-4	\$500.00	300	F - \$100	\$500.00	\$0.00
Doug Rutan	DS1-4	\$0.00	248	F - \$100	\$0.00	\$0.00
Donald Sandler	DS1-4	\$0.00	239	G - \$50	\$0.00	\$0.00
Donald Sanson	DS1-4	\$0.00	84	H - \$25	\$0.00	\$0.00
Donald Schaefer	DS1-4	\$0.00	199	G - \$50	\$0.00	\$0.00

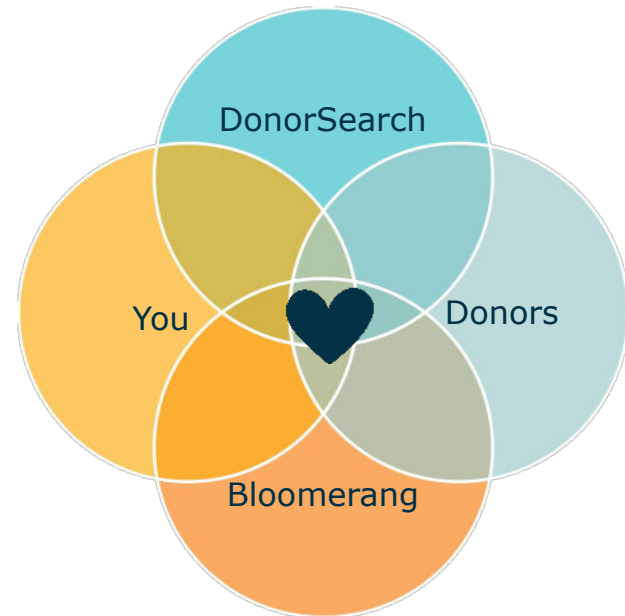
- Identify your 90%
- Prepare any appeals ahead of time
- Pledges can help secure larger gifts from typically smaller donors
- REMEMBER TO STOP AND BREATHE!

## Wrapping Up...

### Part of the Equation



### The Full Picture





## Next Steps...

Name: Mike Bronson

Phone Number: 410-670-7881

Email Address: [mike@donorsearch.net](mailto:mike@donorsearch.net)

**Ready to take your fundraising to the next level?** Let us show you how!

**Book a demo** with one of our fundraising experts today to see how your organization can harness the power of data.

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# Poll







# Resources

## Knowledgebase

- [DonorSearch Basics](#)
- [DonorSearch Generosity Details Explained](#)
- [Major Gifts Prospect Identification](#)
- [Major Gifts Moves Management](#)

## Bloomerang Academy

[Bloomerang + DonorSearch Integration](#)

[Bloomerang + Donorsearch: Six Markers of Philanthropy](#)

[Bloomerang and DonorSearch: Uncover the Secret Giving Power of your Constituents](#)

## Other Resources

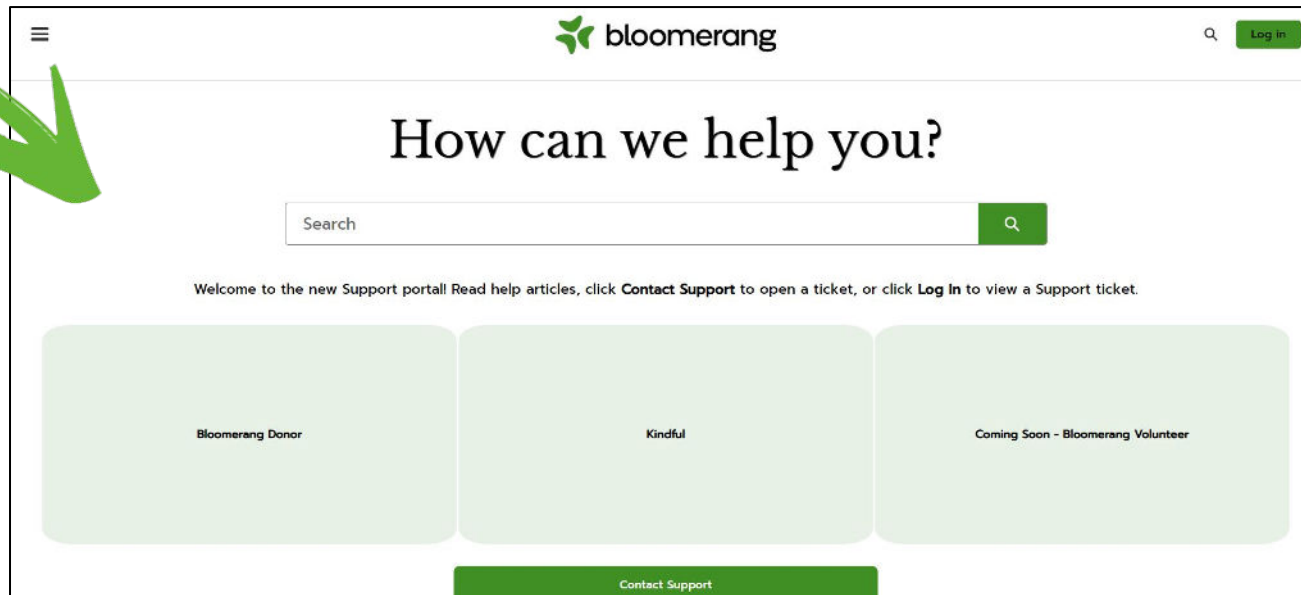
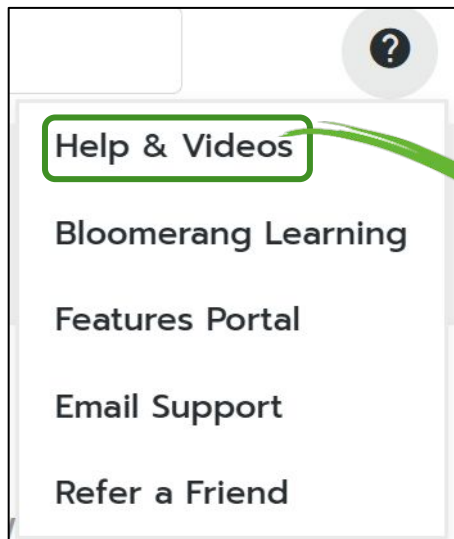
[DONORSEARCH + BLOOMERANG](#)  
(information webpage)

[The True Key To Unlocking Giving Is Generosity](#)  
(article)



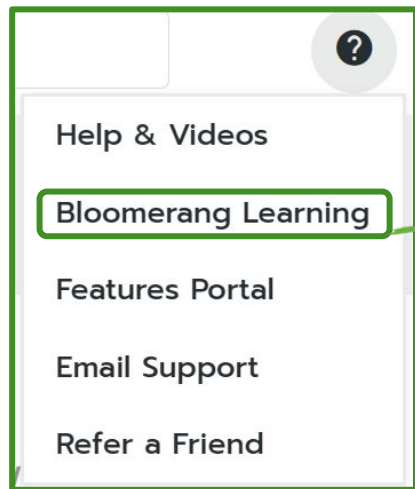
# Resources

## Bloomerang Knowledgebase and Support Portal



# Resources

Bloomerang Learning – our new on-demand learning platform



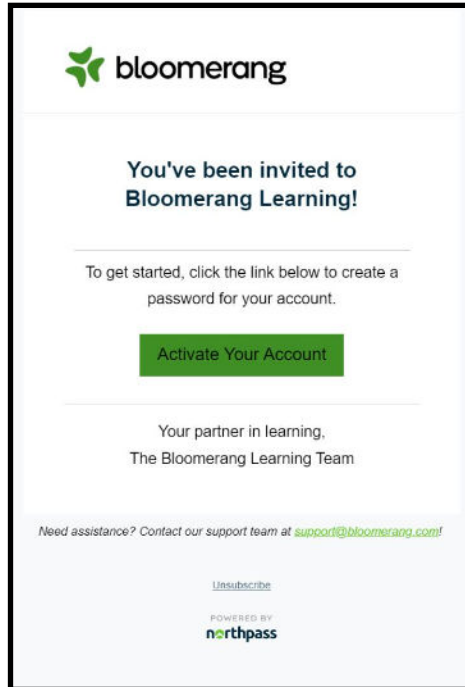
A vertical navigation menu with a question mark icon at the top. The items are: Help & Videos, Bloomerang Learning (highlighted with a green box), Features Portal, Email Support, and Refer a Friend.



The screenshot shows the Bloomerang Learning platform interface. At the top, the Bloomerang logo is on the left, and links for 'Contact Support', 'Upgrade My Account', and 'Visit our website' are on the right, along with a search bar and a 'MW' button. The main heading reads 'Welcome to Bloomerang Learning'. Below this is a navigation bar with icons for Home, Dashboard, Learning Paths, Catalog, and Events. The 'Content by Product' section features three cards: 'Donor Database' (Access learning for your Bloomerang Donor Management System), 'Fundraising' (Access learning for your fundraising tools within Bloomerang Donor), and 'Volunteer Management' (Access learning for your Bloomerang Volunteer System). A large green arrow points from the 'Bloomerang Learning' menu item to the main content area.

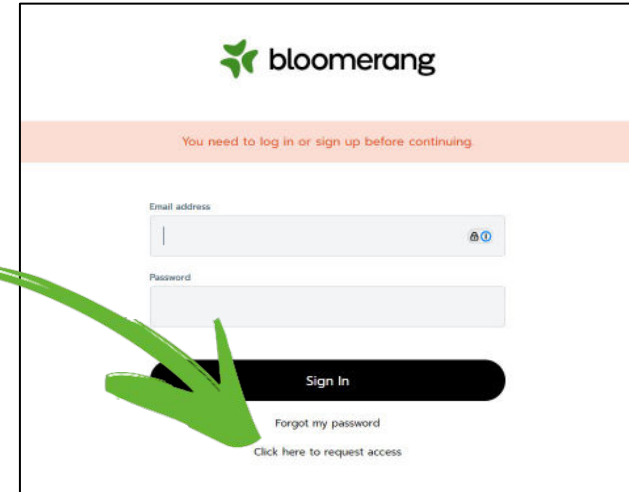
# Resources

## Bloomerang Learning – our new on-demand learning platform

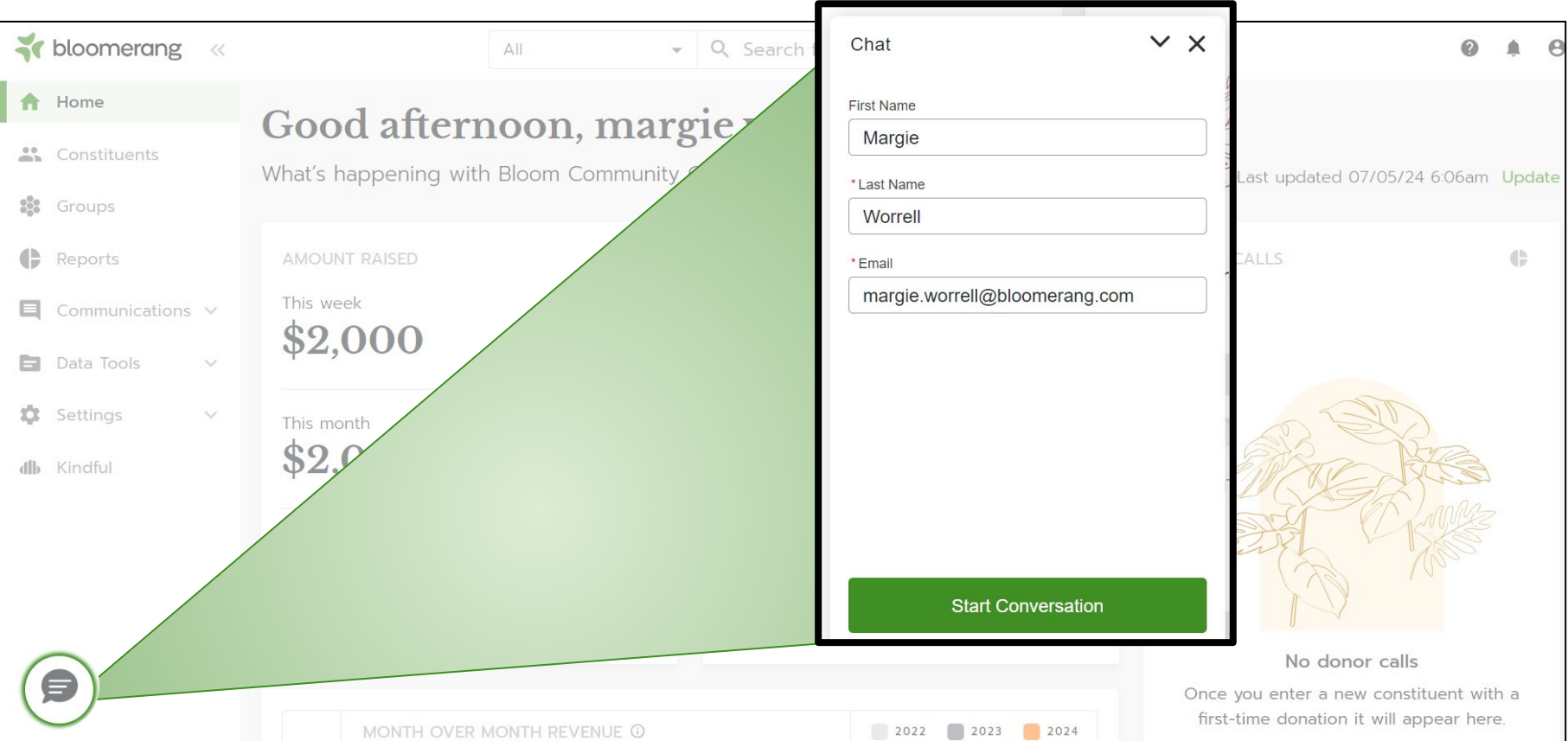


You will be receiving this email to activate your Bloomerang Learning account!

Don't have it? Reach out to Support for assistance.



# Live Chat to get online assistance immediately



The image shows a screenshot of the Bloomerang dashboard with a chat window overlay. The dashboard includes a sidebar with navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main content area displays a greeting "Good afternoon, margie" and a section for "AMOUNT RAISED" showing "This week \$2,000" and "This month \$2,000". A search bar and a dropdown menu are visible at the top. The chat window, titled "Chat", is positioned in the center and contains a form with the following fields: "First Name" (filled with "Margie"), "\*Last Name" (filled with "Worrell"), and "\*Email" (filled with "margie.worrell@bloomerang.com"). A green "Start Conversation" button is located at the bottom of the chat window. The background of the dashboard is partially obscured by a green triangle pointing towards the chat window. At the bottom right, there is a section titled "No donor calls" with a sub-heading "Once you enter a new constituent with a first-time donation it will appear here." and a decorative plant illustration.

Home  
Constituents  
Groups  
Reports  
Communications  
Data Tools  
Settings  
Kindful

AMOUNT RAISED

This week  
**\$2,000**

This month  
**\$2,000**

MONTH OVER MONTH REVENUE

2022 2023 2024

Chat

First Name  
Margie

\*Last Name  
Worrell

\*Email  
margie.worrell@bloomerang.com

Start Conversation

No donor calls  
Once you enter a new constituent with a first-time donation it will appear here.



**Thank you for attending!**

And thank you for all you do  
in your communities!

