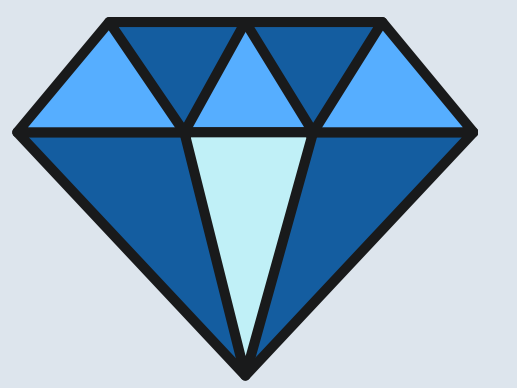




# Using Data & Process to Drive a Public-Phase Campaign Prospect Pipeline



**Award Winner:** Chautauqua Institution

**Year:** 2024

**Award Level:** Sapphire

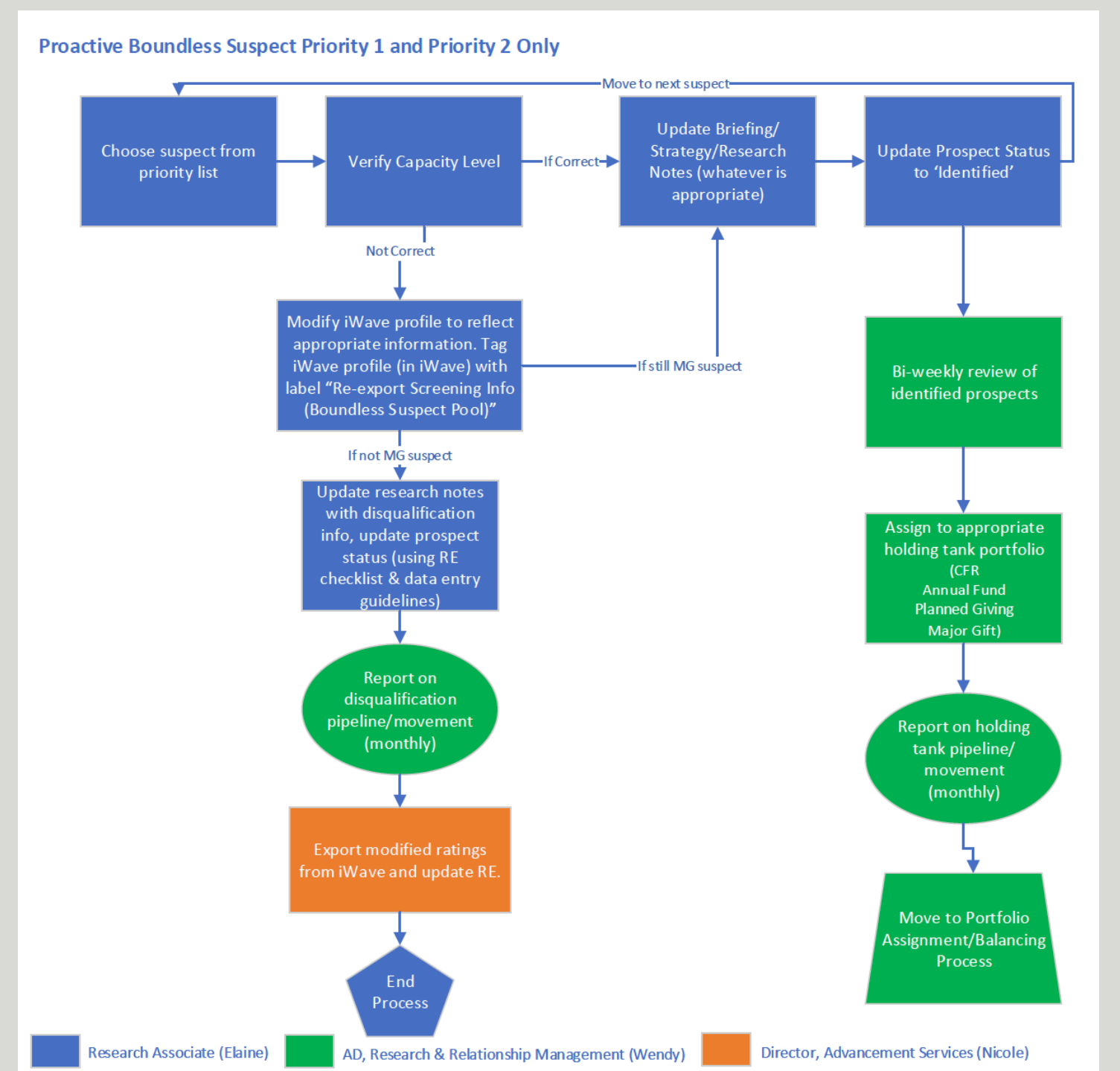
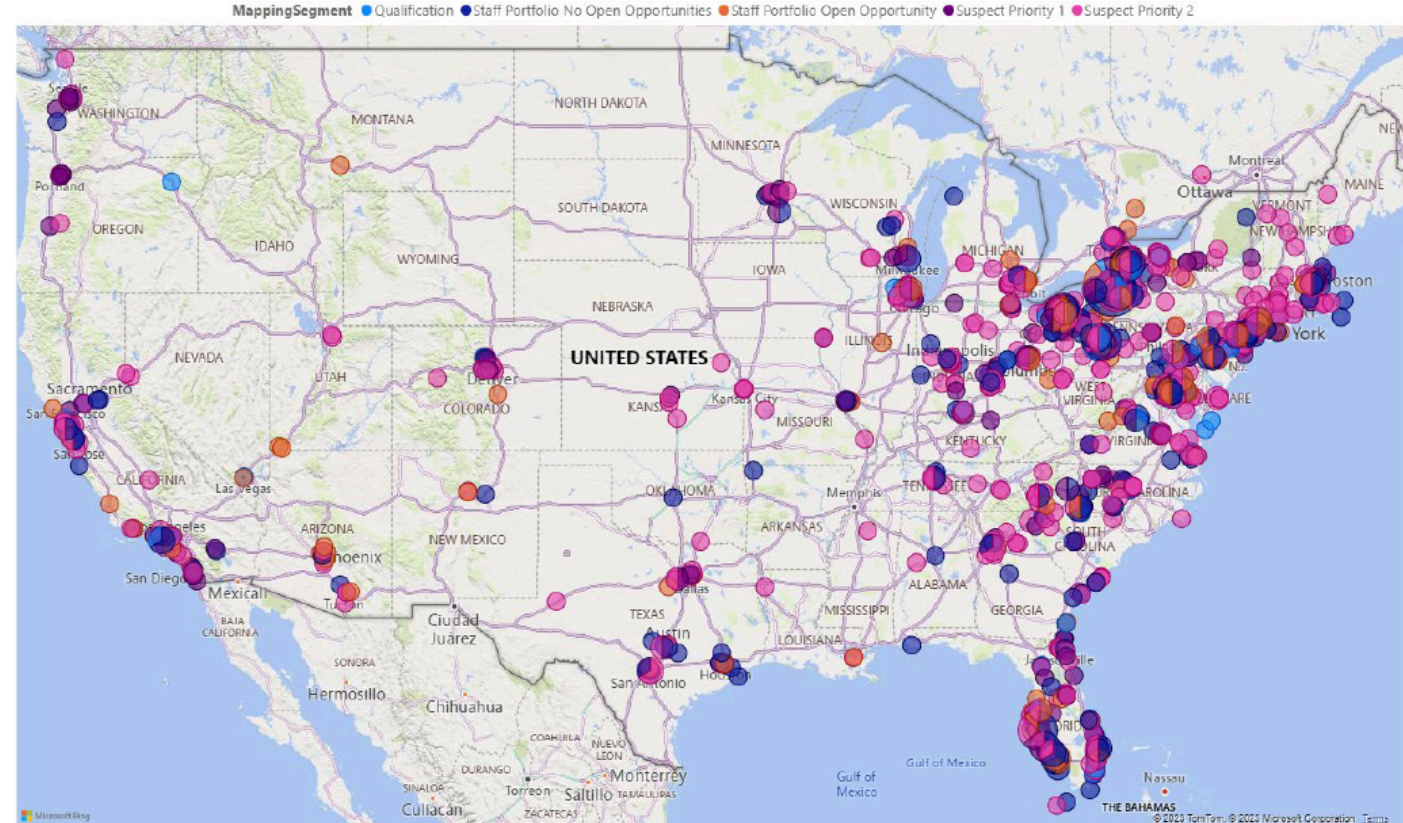
**Category:** Prospect Development

## Pipeline Heatmap

Developed a Power BI dashboard for off-season travel & event planning, enabling data-driven decision making within different levels of priority prospects and suspects.

Tracking five segments for continued movement through the campaign pipeline and beyond:

- Staff Portfolio – Open Opportunities
- Staff Portfolio – No Opportunities
- Qualification Pool
- Suspect Priority 1
- Suspect Priority 2



## Project Summary

This project was developed to bring a public-phase campaign pipeline to life by using data to generate clear and robust discussions with leadership and fundraisers.

Using business intelligence tools, we layered organization-specific data on top of a wealth screening to aid in prioritization of travel planning, suspect qualification, outreach, and campaign events. We analyzed capacity and giving in relation to recency and duration of on-site attendance; in addition, we excluded constituents who had previously been disqualified from major gift cultivation by a fundraiser.

The remaining data was presented visually in dashboards to focus future outreach and engagement.

## Contact Information

Nicole K. Szydlo  
 Director of Advancement Services  
 Chautauqua Institution  
 nszydlo@chq.org

## Aspire Awards

