# Make Time for Prospect Research? Right!

Ruthie Giles Senior Researcher for Prospect Management 2017 JCamp 180 Conference Tuesday October 24, 2017 Session F7 9:15AM - 10:30AM

# Prospect Research

# WHAT IS IT?



memegenerator.net

#### What is Prospect Research?

- The gathering of information on a specific prospect (which can be an individual, corporation, or foundation ... but typically is an individual) in order to inform a gift officer about a prospects career, education, philanthropic interests, family connections, wealth and financial holdings.
- It incorporates (if a prospect researcher is good at their job) an analysis of the information that is gathered via the research and strategies on how to engage, cultivate, solicit, and steward that prospect.

# Prospect Research



### Why would you want to do Prospect Research?



#### Why would you want to do Prospect Research?

#### **Prospect A**

- Married woman, 35ish
- 2 children, 8 and 10 years old
- 3 bedroom, 1 bath, 1,200 sq ft house
- \$2,500 annual property taxes
- VP for a local bank
- No political giving was found
- Sits on board for local boys & girls club
- Made a few \$100 gifts to the local food pantry

#### **Prospect B**

- Married woman, 65ish
- 2 children, out of college
- 4 bedroom, 2 bath, 2,500 sq ft house
- \$25,000 annual property taxes
- SVP for an international bank
- Gives low 4-figures to Democratic campaigns
- Sits on board for local boys & girls club
- Has made mid 5-figure gifts to museums, colleges, and cancer research

### Doing Prospect Research on a Budget



#### Doing Research on a Budget

- You can do prospect research no matter the size of your budget.
- You can do prospect research without paying for resources.
- There are many free resources available online.
- It requires some time to do research, and often time is money.
- There is a good return on investment for doing prospect research.
- Allow a staff member time to do prospect research.
- Your investment in doing prospect research will pay for itself.

# The Ethics of Doing Prospect Research



#### The Ethics of Doing Prospect Research

- APRA Statement of Ethics.
  - http://www.aprahome.org/page/statement-of-ethics
- This code of ethics includes a section addressing social media.
- Only use publically available sources.
- With any information that you compile you should be comfortable revealing it all to the donor.
- Any resource that you use, you should be comfortable revealing it.
- Refrain for including information may be touchy/sensitive.

### Information You Can Find via Prospect Research

- Real Estate Information
- Family/Relationship Information
- Philanthropic Giving
- Political Giving
- Business, Personal, and Volunteer Connections
- Foundation Information
- Business/Career Information



### Real Estate Data



#### Real Estate Data: www.Zillow.com



#### Real Estate Data: www.Zillow.com

CORRECT HOME FACTS

Public View

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Owner View

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I own this home and would like to ask an agent about selling 42

Contact Agent

Or call 413-241-3949 for more info

#### The key info is here

#### Real Estate Data: maps.google.com

Street view



#### Map view

### Real Estate Data: www.pulawski.net

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	Kansas	Kentucky	Louisiana	Maine	Maryland					
	Massachusetts	Michigan	Minnesota	Mississippi	Missouri					
	Montana	Nebraska	Nevada	New Hampshire	New Jersey					
	New Mexico	New York	North Carolina	North Dakota	Ohio					
	Oklahoma	Oregon	Pennsylvania	Rhode Island	South Carolina					
	South Dakota	Tennessee	Texas	Utah	Vermont					
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Disclaimer: This table is intended to be a repository of information supplied by prospect researchers around the world. Although you and your calculator may seem to arrive at a very precise estimate using these numbers, please remember that it is simply a "ballpark" figure (probably on the low side, for many reasons including time lag). Accuracy is not guaranteed, and no entities involved with creating or maintaining this database bear any responsibility for its use.

Looking for Northwestern University Is Development Research site?



#### Click here to search obits

← 🛈 🕅 www.legacy.com

When you click on Obituaries - you can search both the obits and the guestbook. Knowing who someone was friends with has value.



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* * *	Wesley Roderick "Rocky" ( Bangor, ME, USA	Giles Jr.		View Obituary			
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	Maine on October 12, 2010.						



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#### Obituaries: www.legacy.com and beyond

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			Renate Giles November 10, 1935 - September 01, 2017 HAMPDEN Renate Giles, 81, passed away peacefully on Sept. 1, 2017, at East Side Healthcare in Bangor. She was born on Nov. 10, 1935, in Schweinfurt, Germany, to Hans Heinrich Uselmann und Helene Uselmann. Renate and her son, Bill, cam to the U.S. in Published on September 2, 2017	Search by Name first last search Q ANCESTRY DATA © 2017 Powered by AncestryData
¥ ¥	Wesley Giles Jr. February 11, 1929 - October 08, 2010 BANGOR BANGOR - Wesley Roderick "Rocky" Giles Jr. passed away Friday, Oct. 8, 2010, at his home. Born Feb. 11,	LeRoy Giles September 04, 1942 - July 24, 2010 PATTEN PATTEN - LeRoy Wesley Giles, 67, died unexpectedly July 24, 2010, at his home. He was born Sept. 4, 1942,	6	

in Patten, to Wesley and Iola

1929, in Bangor, he was the only child

There is the handsome devil we are looking for!

#### Obituaries: www.legacy.com and beyond



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#### Nonprofit Giving & Connections

Pearls Before Swine by Stephan Pastis October 16, 2013 🔳 🥅 TRYING TO RAISE GREAT. I HEARD A SO HOW NEIGHBOR BOB HAPPYO FLEE THE WHAT GOOD WELL DOES ARE MONEY FOR A FOR YOU. 'FREAKONOMICS' NEIGHBOR IS A 6###6#6 THATS YOU NEIGHBORHOOD THAT HOWS PODCAST EXPLAINING GENEROUS HOOD WHILE EAPO WHO HAS SWIMMING POOL THAT A BIG MOTIVE DOING AFFECT YOU STILL YOU NOT GIVEN ONE GOING.2 RAT.<sup>2</sup> FOR CHARITABLE GIVING HOW BOB. CAN, BOB BUC IS NOT ALTRUISM. YOU BUT SOCIAL PRESSURE. GIN



It is FREE!

Not everyone is in here, but if they are ... that is saying something.

It is worth running the name through here - just in case.





There is a lot of information here, however it is important to look at what lies under every tab (Relationships, Interlocks, Giving, Political, Data).

#### The DATA tab should be your favorite!



You can look at all the data at once, or you can slice and dice it to look as the segments you want.

IMPORTANT TO NOTE: You can export this data to a CSV (you can open a CSV in Excel and then have more options on how to massage the data - ask your office Excel expert for help)

# Nonprofit Giving & Connections: Google Search

#### Do a Google Search using the following search parameter guidelines

- Search for org and edu extension on the web address
  - edu "Ruthie Giles"
  - org "Ruthie Giles"

#### • Google several variations of the constituents name:

- "Ruth M Giles"
- "Ruth Giles"
- "Ruthie Giles"
- "Ruth Giles and Chris Szarek"
- "Chris Szarek and Ruth Giles"
- "Chris Szarek"
- "Christopher Szarek"
- "Mr. & Mrs. Christopher Szarek"

### Nonprofit Giving & Connections: Google Search



Get to Google faster. Switch your default search engine to Google.

Sign in ×



#### Some results are not right

# Political Giving



# Political Giving: OpenSecrets.org

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#### BLOG POST

#### Trump's old New York pal

#### By Geoff West | September 28, 2017

In early September, President Donald Trump, Senate Minority Leader Charles Schumer (D-N.Y.) and House Minority Leader Nancy Pelosi (D-Calif.) agreed on a plan to raise the debt limit, stabilize short-term funding and send hurricane aid relief to Texas – while ignoring the Republicans in the room. Fox News wasn't too

#### BLOG POST

#### Which states will break spending records this cycle?

#### By Andrew Mayersohn September 25, 2017

This month's special Senate election in Alabama has already been the target of more outside spending than any congressional race in the state's history. By the time the final FEC reports are filed, it will likely be the state's record-holder in candidate spending, too. In 2016, nine states



#### DATA FEATURE

Senator Menendez stands trial for corruption

#### September 18, 2017

Senator Bob Menendez (D-NJ) is currently facing bribery charges stemming from a major pay-toplay investigation involving a Florida ophthalmologist, Salomon Melgen. Menendez's trial is the first of a sitting senator in nearly four decades. Follow the money and check out

# Political Giving: OpenSecrets.org

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	Money to Candidates	GATES, WILLIAM SEATTLE, WA 98105		06-30-1999	-\$500.00	Gorton, Slade (R)			
	Money to Candidates			11-10-2011	\$1,500.00	McConnell, Mitch (F	R)		
	Money to Candidates	GATES, WILLIAM KIRKLAND, WA 98083	MICROSOFT CORPORATION	11-10-2011	\$500.00	McConnell, Mitch (F	R)		
	Money to Candidates	GATES, WILLIAM SEATTLE, WA 98105	BILL & MELINDA GATES FOUNDATION	03-08-2012	\$571.00	McCaskill, Claire (D	)		÷

#### Foundation Information



#### Foundation Information: Guidestar.org

- It is free you simply need to create a username and password
- You get access to the IRS 990 forms for foundations
- Within the 990 form you can find:
  - Foundation address, phone, url
  - Total assets, total grants paid
  - Salaries for the top paid employees of the foundation
  - A list of the board members
  - A list of who the foundation donates to, and how much they donated
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| Mission<br>Vision:   | Founding Year 🖯<br>1993   | EIN<br>68-0065687  | IRS Filing Requirement<br>This organization is required<br>to file an IRS Form 990-PF.  |     |                |
| Our vision is of a new world of learning based on the compelling truth that improving education is the key to the  | Executive Director,<br>Edutopia<br>Cindy Johanson                             | න්තිස් BRIDGE Number <sup>ම</sup><br>6469701941                          | Download Tax Forms  |     | s the IRS 990s |
| survival of the human race.<br>It's a world of creativity, inspiration and ambition informed   | Executive Director, Lucas<br>Education Research<br>Kristin De Vivo            | Cause Area (NTEE Code)<br>Fund Raising and/or Fund<br>Distribution (B12) | Social Media  | hei | re.            |
| by real-world evidence and experience. It's a world where<br>students become lifelong learners and develop 21st-<br>century skills. It's a world where innovation is the rule, not<br>the exception. It's a world where schools provide rigorous<br>project-based learning, social-emotional learning, and | Main Address<br>PO Box 3494<br>San Rafael, CA 94912 USA<br>Show More Contacts |  | Blog  |     |                |
| access to new technology. It's a world where students and  | Keywords  |  |   |     |                |

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	14 Other employee salaries and wages	3,835,337.		249,059.	3,586,278.	S
	15 Pension plans, employee benefits	879,300.		63,773.	815,527.	
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List of officers, directors, trustees

List of 5 highest paid employees

(i) www.guidestar.ovg/FinDocuments/201

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990PF, PART VIII - COMPENSATIO	N OF THE FIVE HIGHEST FAID I	MPLOYEES	ATTACHMEN	9 79
NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	AND OTHER
NON GOODSPEED P.O. BOX 3494 IAN RAFAEL, CA 94912	WEB PRODUCT PRODUCER 55.00	160,030.	35,603.	
NJIAN CHAN P.O. BOX 3494 FAN RAFAEL, CA 94912	DIRECTOR OF FINANCE 55.00	154,503.	23,378.	
HARLES FESKO .0. BOX 3494 IAN RAFAEL, CA 94912	SENIOR DIR/AD SALES 55.00	147,170.	19,315.	
NIGELA DEBANGER P.O. BOX 3494 JAN RAFAEL, CA 94912	LER SR PRGM OFFICER 55.00	146,100.	10,803.	
ERIC HESTENES 7.0. BOX 3494 MAN RAFAEL, CA 94912	DIRECTOR DEV 4 TECH 55.00	141,610.	20,649.	
	TOTAL COMPENSATION	749,501.	117,828.	
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	THE GEORGE LOCAS EDUCATIONAL FOCHDATION FORM POOPF, FRAT VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTERS											
NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER MEEK DEVOTED TO FOSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE DEMEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWARCES								
GEONGE W LUCAS JR P.O. NOX 3494 SAN RAFNEL, CA 94912	CHAISHENN 1.00	0.	0.	0.								
STEPHEN D ARNOLD P.O. BOX 3494 DAN BAFMEL, CA 34912	VICE-CNAIR/CPO 7.00	0.	٥.	۰.								
MARSHALL TURNER P.O. BOK 3494 SAN RAFREL, CA 94912	DIRECTOR 1.00	0.	0.	е.								
ROBERT BRACLEY 7.0. BOE 3494 DAB RAFREL, CA 94912	DIRECTOR 1.00	υ.	0.	۰.								
KIN MEREDITH P.O. BOK 3494 SAN RAFREL, CA 96912	DIRECTOR 1.00	٥.	0.	٥.								
KATE NYEGAARD P.O. BOK 3494 SAN RAFAEL, CA 94912	DIRECTOR 3.00	٥.	0.	۰.								

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AND CONF 1710 MAJR EDNOLT, F.A. NON FLOM ANDA MEMORY, C. NOV(7-2)(10	-	PROJECT BRODE LEARCHE BARONELED CONTROL PROJECT STORE OF REPAIRING PLACEMENT CONTROL	824,183.	
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ATTACHMENT (

PAGE 3

## **Business Information**



## **Business Information**

#### • HOW TO FIND A BUSINESS WEBSITE VIA AN EMAIL ADDRESS:

- If the person has non-generic e-mail try the extension as the url:
- Rgiles@mtholyoke.edu = www.mtholyoke.edu
- PmGiles@syr.edu = www.Syr.edu

#### What you might find on a Business website:

- Company history
- Bios of top management
- E-mail addresses
- Company address, phone, fax
- Client list
- Locations



## LinkedIn Profiles



## LinkedIn Profiles

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DESERTION ADDRESS Participants



Mit Person howardconyoga.com Kilveachers php



Now and Zen Yopa, has been studying yoga since 1999, and teaching since 2003. She is a 200-Hour Repotened rogs Teacher (NYT), and has studied roga with TKV Depikadier, Kausthub Dasikaihar, Rodney Yee and Anaforrest. Ruth is also a certified Spencer Plates\*\* instructor, Buth holds a Bachelors degree from Smith College and a Mesters in Business Administration from the University of Maspachusetts, Rulh brings a playfully

Buth PL Gilles, Director and Owner of

Split-hearted attitude to her teaching as she infuses her atudents with a passion for yogo.



Dog Dapp of Summer Yoga Challenger Webs on August 31st - there is shift time to WTK COOL STUPPI

Now & Zen Yoga Blog

Contact Us

NEW FALLS CLASS SCHEDUCES Warne faptacobar 1, 2007

Guosd on Labor Day Weekandt Est. 3/1 through Hun. 3/2

From Introduction to Yopar. September 89x 2-00-2-00pm

Yoga Teacher Training Q&A; Sections September 18th, \$130-7,30pm September 19th, 11(30-12)30pm

> Prenatal Yorpe Session: Beging Destember 22nd

**San Salutation Warkshop** Debeller (20), 2100 - 4100pm

Stress Nanagement Workshop Novamber 3rd, 2-00-5-00pm

Work Study Opportunity Available Distribute Rent in exchange for yoga diatest.

See Workshops & Events page for 

Aaron Vega, RYT, has completed the 200hour yoga teacher training, and he has over five years of a rich and varied yoga practice. Aaron has practiced with teachers from Vermont, Massachusetts, New York. and Austin, Texas. He has practiced several styles of yogs including Astange, methal bikram and Kundalini, Aaron's yoga teaching focuses on basic breathing. Individues, exploring yoga postures and uncovering one's swit inver strength. His nuscies, relieve both physical and

lasses are designed to direngthen and time emotional streps, morease focus and energy, and above all - have fun. Vail Aarint's website at a www.veptytob.com

Gayle Stefanelli has been teaching primar fitness and wellness classes for over 20 vears. She is a 200-hour Reputered Yoge Teacher and certified to teach Mat Pilates. Gayle has also studied through to teach yogs to those with life allering illnesses, canthac conditions and cancer, the created and presents the "Woman and Weightss." workshop.

(\$2004-2017 Novik Zen Yoga - Indian Dohard, AA (\$233) ALL DEL 2010 - Info@execution.coga.com

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#### More Free Resources for Prospect Research

- Northwestern Univ.: http://www.nudevelopment.com/research/bookmark.html
- Portico: http://indorgs.virginia.edu/portico/
- Prospect Research Institute: http://www.protopage.com/prorinstitute
- APRA: http://www.aprahome.org/
- NEDRA: http://www.nedra.org/
- PRSPCT-L (Best Listserv EVER): http://listserv.apra-prspctl.org/wa.exe?A0=PRSPCT-L

## Subscription Resources for Prospect Research

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- Alumnifinder: http://www.alumnifinder.com/
- DonorSearch: http://www.donorsearch.net/
- Foundation Directory Online: https://fconline.foundationcenter.org/
- iWave PRO: https://pro.iwave.com/
- Lexis Nexis for Development Professionals: https://www.lexisnexis.com/enus/products/lexisnexis-for-development-professionals.page
- NOZAsearch: https://www.nozasearch.com/
- WealthEngine: http://www.wealthengine.com/

## Print Resources for Prospect Research

- Prospect Research for Fundraising Professionals: The Essential Handbook by Jennifer J. Filla and Helen E. Brown
- Prospect Research: A Primer for Growing Nonprofits by Cecilia Hogan
- Prospect Research in Canada: An Essential Guide for Researchers and Fundraisers by Tracey Church and Liz Rejman
- Getting Started in Prospect Research: What You Need to Know to Find Who you Need to Find by Meredith L. Hancks
- Prospect Research is a Verb: Fundraising is the Subject by Meredith Hancks and Cara Rosson

### Blogs for Prospect Research

- Ruthie Giles: http://theartofprospectmanagement.blogspot.com/
- Jennifer Filla: http://www.jenniferfilla.com/blog/
- Helen Brown: http://www.helenbrowngroup.com/the-intelligent-edge-by-helenbrown/
- Armando Zumaya: http://www.armandozumaya.com/
- Kevin MacDonell: https://cooldata.wordpress.com/
- DonorSearch: http://www.donorsearch.net/blog/

#### CONTACT:

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