Prospect Research

WHAT IS IT?
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 prospect's 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 DO THAT?
Why would you want to do Prospect Research?

- Right Prospective Donor
- Right Amount
- Right Time
- Right Solicitor
- Right Project
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

AND THEN WE'LL BUILD A SECOND PROTOTYPE AND...

IT'S NOT IN THE BUDGET

OH, SUDDENLY IT'S MY FAULT FOR CARING ABOUT THE 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

BEST PRACTICES
The Ethics of Doing Prospect Research

- APRA 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

Type house address here
Real Estate Data: www.Zillow.com

The key info is here
Real Estate Data: maps.google.com
Real Estate Data:  www.pulawski.net

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<th>Tax Assessor Database</th>
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<td>U.S. Virgin Islands</td>
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Contributions to this project are strongly encouraged. Please feel free to send the following information whenever you call a tax assessor's office:

- The name of the county, city, or township office
- The number by which you must multiply the assessed value to come up with the market value
- Please number of the office
- Tax assessor's web address

You may also wish to access the Geographic Name Server here to determine what county a particular city is in. The name server provides other information about cities as well.

*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? Development Research site?
Obituaries
Obituaries:  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.
Obituaries:  www.legacy.com
Obituaries: www.legacy.com

We found our man
Wesley Roderick Giles Jr.

Obituary: Wesley Giles passed away in Bangor, Maine. The obituary was featured in BDN Maine on October 12, 2010.

Guest Book

What would you like to say about Wesley?

Not sure what to say?

Posting Guidelines | FAQ

Submit

Advice & Support

Add a Photo or Video

Guest Book Messages

Marie, I was sorry to hear about Rocky's passing. You and the girls are in my thoughts.

.....

Marie: Our prayers are with you and your family. Rocky was a great classmate, football teammate and friend.

October 12, 2010

Margaret Page
Obituaries:  www.legacy.com
Obituaries: www.legacy.com and beyond

There is the handsome devil we are looking for!
Obituaries: www.legacy.com and beyond

BANGOR - Wesley Roderick "Rocky" Giles Jr. passed away Friday, Oct. 8, 2010, at his home. Born Feb. 11, 1929, in Bangor, he was the only child of Wesley R. Giles Sr. and Mildred (Bean) Moody. He grew up in Maine and attended Gould Academy, Bethel, from which he graduated in 1947.

Rocky graduated from Maine Maritime Academy in 1950. He was an avid football player during high school and college. After graduating from Maine Maritime Academy, Rocky worked for Texaco for more than three decades as the chief engineer on the oil tanker, SS Rhode Island. He retired as the commodore chief engineer of Texaco American Fleet in 1997, after which he worked briefly for the state of Maine.

During his retirement, Rocky served on the advisory board at Maine Maritime Academy for several years, volunteered at the Maine Maritime Academy Transportation Museum and was a member of Anah Temple Drum and Bugle Corp. Rocky is survived by his wife of 46 years, Marie B. Giles of Bangor, their children, Patricia Giles of Pompano Beach, Fla., and Ruth Giles and her...
WHAT ARE YOU DOING, RAT? TRYING TO RAISE MONEY FOR A NEIGHBORHOOD SWIMMING POOL.

GOOD FOR YOU. HOW'S IT GOING?

GREAT. I HEARD A 'FREAKONOMICS' PODCAST EXPLAINING THAT A BIG MOTIVE FOR CHARITABLE GIVING IS NOT ALTRUISM, BUT SOCIAL PRESSURE.

SO HOW DOES THAT AFFECT YOU?

NEIGHBOR BOB IS A CHEAPO WHO HAS NOT GIVEN ONE BUCK TO——

HAPPY? WELL, THAT'S GENEROUS OF YOU, BOB. FLEE THE NEIGHBORHOOD WHILE YOU STILL CAN, BOB.
Nonprofit Giving & Connections: LittleSis.org

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.
Nonprofit Giving & Connections: LittleSis.org

Here is the one we want!
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)
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

Some results are right

Some results are not right
Political Giving

RICK ASTLEY
FOR
PRESIDENT
HE WILL NEVER
✓ GIVE YOU UP
✓ LET YOU DOWN
✓ RUN AROUND
✓ DESERT YOU
✓ MAKE YOU CRY
✓ SAY GOODBYE
✓ TELL A LIE
✓ HURT YOU
2016
Out of the swamp... or into the shadows?

People change jobs all the time, but what does that mean in the lobbying world? Our research found that nearly a third of the lobbyists who stayed at the same organization, but did not report any lobbying activity in the first quarter, have titles that indicate they are still working on influencing U.S. federal policy. Was the swamp drained, or are they simply trying to circumvent the rules?

READ OUR REPORT

BLOG POST

Trump's old New York pal

By Geoff West  September 28, 2017

In early September, President Donald Trump 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 impressed.

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-to-play 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
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
Foundation Information: Guidestar.org

You can access the IRS 990s here.
Foundation Information: Guidestar.org
Foundation Information: Guidestar.org

Contributions, gifts, grants paid
Grants and Contributions Paid During the Year, or approved for future payment
Foundation Information: Guidestar.org
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

Here's a "help wanted" ad for a babysitter.

I could do that. Kids love dinosaurs.

Your species is known to be carnivorous.

One problem.

I'll put "strict disciplinarian" on my resume.
LinkedIn Profiles

User Agreement

Effective on June 7, 2017

Our User Agreement has been updated. Click here to see a summary of changes.

Our mission is to connect the world’s professionals to allow them to be more productive and successful. Our services are designed to promote economic opportunity for our members by enabling you and millions of other professionals to meet, exchange ideas, learn, and find opportunities or employees, work, and make decisions in a network of trusted relationships.

View our User Agreement video

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3. Rights and Limits
4. Disclaimer and Limit of Liability
5. Termination
6. Dispute Resolution
7. General Terms
8. LinkedIn “Dos” and “Don’ts”
9. Complaints Regarding Content
10. How To Contact Us
LinkedIn Profiles
Internet Archive:  www.archive.org
Internet Archive: www.archive.org

She may look familiar
Internet Archive: www.archive.org

- DISCLAIMERS
  - Not all pages will exist
  - Not all content will load correctly
  - Archived sites may not be fully navigable

- USE THIS WHEN
  - Need a tool to help retrieve information on an older/defunct business
  - Want to look for a business bio for a constituent who used to work someplace
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-prspct-l.org/wa.exe?A0=PRSPCT-L
Subscription Resources for Prospect Research

- Ancestry: https://www.ancestry.com/
- Alumnifinder: http://www.alumnifinder.com/
- DonorSearch: http://www.donorsearch.net/
- Foundation Directory Online: https://fconline.foundationcenter.org/
- iWave PRO: https://pro.iwave.com/
- 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/
- Armando Zumaya:  http://www.armandozumaya.com/
- Kevin MacDonell:  https://cooldata.wordpress.com/
- DonorSearch:  http://www.donorsearch.net/blog/
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(413) 538-2521