



Prospect Research:

Beyond the Basics

Featuring:

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Prospect Research and Management Specialist
Oregon Food Bank

What does a Prospect Researcher Do?

Uses data to help development professionals more strategically focus their fundraising efforts.

Finds additional revenue leads for fundraisers to build the best relationships with donors as possible.

Equips fundraisers with the informed confidence they need to make the right ask at the right time of the right person. Anything less is just Googling.

Favorite Grants Research Resources

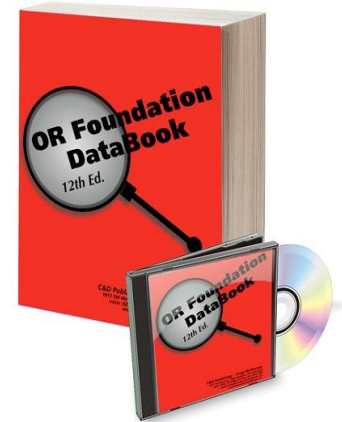
Online

- Foundation Directory (Foundation Center)
- GrantStation
- Grants.gov
- Guidestar
- Grantmaker Associations
- Funder Websites



More Grants Research Resources

- Workshops/funder panels/conferences
- Funder events or RFP info sessions
- Oregon/Washington Foundation DataBook
- Chronicle of Philanthropy
- Email/E-newsletter Lists – Funders, Grant Professionals



Meet a Real Prospect Researcher!

Position: Prospect Research & Management
Specialist, Oregon Food Bank

Areas of Responsibility

- Research
- Moves Management
- Reporting and Analysis





Oregon & SW Washington

What I'm Looking For

Capacity

- Real Property
- Employment/Income
- Stock
- Airplane/Yacht
- Company ownership

Bio

- Employment
- Family Relationships
- Business Relationships
- Foundation Relationships

What I'm Looking For, con.

Interests

- Hobbies
- Charitable giving
- Political Giving

Company Revenue



Contact Info/Relationships/Employment

- LexisNexis
- LinkedIn*
- RelSci **free!!!*
- Spoke*
- Google* (Keywords: "Gift", "Benefactor", "Donation", "Patron", "Philanthropy", "Generosity", "Special Thanks", "Honor Roll", "Sponsor")

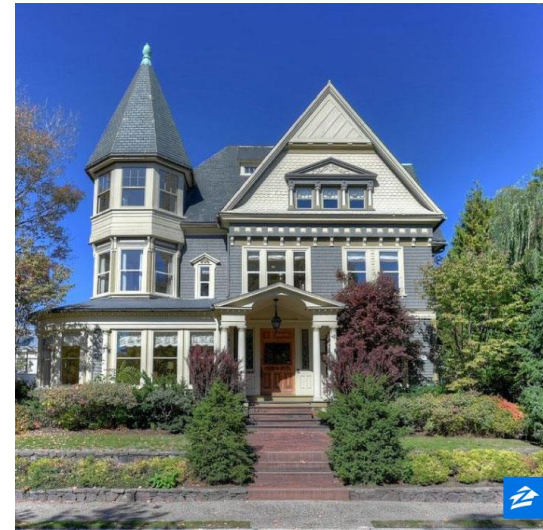
More Research Resources

Wealth Estimate/Charitable and Political Giving

- ResearchPoint
- DonorSearch
- iWave Pro
- WealthEngine
- CampaignMoney.com*

Real Property

- Zillow*
- Redfin*
- LexisNexis



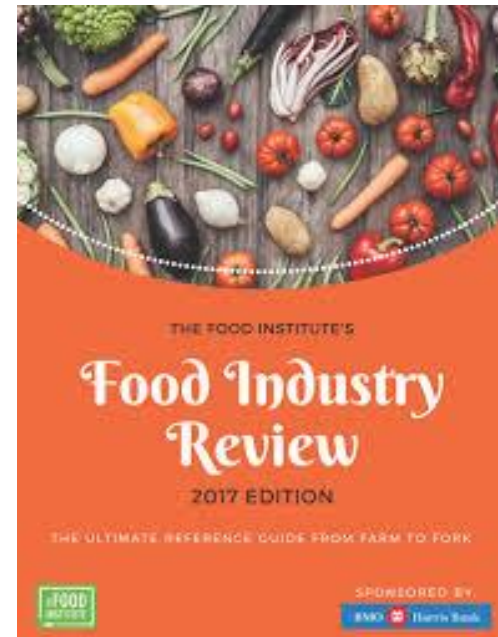
Even More Research Resources

Corporate Research

- D&B Hoovers*
- State Business Registry*
- Company Website*
- Industry publications

Foundation Research

- Guidestar
- Foundation Directory



**free!!!*



Oregon & SW Washington

Donor Profile Snapshot

Donor Profile Snapshots

Date: [date prepared]

Prepared by: [name of document creator]

LAST NAME, FIRST NAME | RE ID: #####

Donor Name and Spouse Name

Primary Solicitor – Developer Name

Wealth estimate:

Giving to other orgs:

Employment:

Family/Interests:

Engagement with OFB:

CONFIDENTIAL



Capacity -

RFM -

Affinity -

Total Giving -

Largest Gift -

Recent Gift -

Donor Name | RE ID: #####

Position, Business Relationship

Primary Solicitor – Developer Name

Background

Co-founded a winery with ex-husband. Winery was sold in 2016, but information on sale could not be found. Served on the board of a local music non-profit. Has a son and a daughter as well as grandchildren. Donor grew up in the suburbs of New York City and Washington, D.C., and then finished high school in Switzerland, which is how she first learned to drink wine. After earning a bachelor's degree in French at Cornell University, she completed a master's degree in romance languages at the University of Michigan. Donor is known as *THE* theater patron of Portland.

Interests

Interests include agriculture and organic farming, theater, chamber music, the environment, and of course wine.

Engagement

2013 – Current CEO and MGD visit donor. No contact report was filed.

2014 – Former DoD visits donor to give an update on the strategic plan. During the meeting, donor expresses an interest in contributing in ways beyond finance, specifically in brainstorming and problem solving. She also showed interest in OFB's advocacy work and the Healthy Pantry initiative.

2015 – CEO and MGD met with donor. CEO asked if donor would be interested in joining the board. They declined saying they liked to be asked their opinion but does not want to have any regular commitment. They discussed OFB's partnerships with organizations to pair mobile pantry services with health care services in order to meet clients where they are.

2016 – During a call with MGD, donor expressed difficulty managing the demands of the many charities they supports and would prefer less contact and has no interest in events.

Giving to OFB

Total: \$481,842

Largest: \$100,000 on 8/5/2009 for OFB West Capital Campaign

Recent: \$30,000 on 9/6/2017

First: \$250 on 11/18/1997

Giving to other Orgs

\$100,000 – 250,000	Theater Company	2015
\$150,000	College Theater Program	2010
\$100,000	Hospital Foundation	2013
\$25,000 – 99,999	Local Theater Non-Profit	2014
\$25,000 – 99,999	University	2016
\$25,000 – 49,999	Children's Cancer Research	2010
\$25,000	Local Theater Non-Profit	2014

Also supports: list of charitable orgs where donor gave less than \$25K

Donor Profile Report

Doing a Lot with a Little

- Prioritize based on internal data scoring
- Time yourself
- Focus on capacity and contact information first



Ethics and Best Practices

- Verify information with 2+ sources.
- Do NOT share outside the organization.
- Stick to the facts.
- Do not record second hand accounts or rumors.
- Use the organizational account for social media.



Questions?

Comments?

