



Building Donor Research into Daily Habits for Successful Fundraising

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## Today's Format

1. What a difference Internet makes...or not?
2. Research sites – free and fee
3. “Quick & Dirty” research
4. Importance of Research
5. Role of donor research in Planned Giving
6. Managing data
7. Exercise – interpreting data

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## Research Evolution

- Microfiche and original documents
- Probate
- Circuit Court
- Historical Societies
- Country Club rosters
- Polk Directories
- Newspaper Archives

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## Never Leave Your Desk

- Internet Sources
- Not complete
- Not accurate
- Wealth of information free and for a fee
- Pieces of a puzzle – you put it together

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## Puzzle Pieces

1. Property
2. Biographical and Family
3. Giving History – there and elsewhere
4. Education
5. Business Interests
6. Financial
7. Activities
8. Formulas for net worth and giving capacity

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## Quick & Dirty Research

1. Property Holdings
  2. Income
  3. Securities
- a. [www.pulawski.net](http://www.pulawski.net)
  - b. [www.simplyhired.com/a/salary/home](http://www.simplyhired.com/a/salary/home)
  - c. [www.sec.gov/edgar.shtml](http://www.sec.gov/edgar.shtml)

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## Crème de la Crème

### 1. Wealthengine – mini profiles

- a. Charitable and political contributions
- b. Dun & Bradstreet reports
- c. Real estate
- d. Securities
- e. Circle of Friends
- f. Entire database screening capabilities

### 2. LexisNexis – now with development focus

### 3. Field Research

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## Importance of Research

- Makes you smarter! Paves your way!
- Easy to get carried away – be selective – define purpose – Major gift? Planned gift?
- Turn information into positive action - use if it makes you move
- Invest time in free tools
- Invest in researcher or fee tools
- Document and Act

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## Difference of Major Gift vs. Planned Gift Prospect

- Major gift prospects = people with wealth
- Planned gift prospects = people with loyalty

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## Why Devote Research to Planned Giving?

1. \$23 billion in Charitable Bequests; 7%
2. Trillions in wealth transfer by 2017
3. ½ population has no Will by age 50

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## Role of Research in Planned Giving

1. Do they consider your organization a part of their family?
2. Gifts of any size over 7+ years
3. Not necessarily big givers – under the radar people
4. Are not necessarily super wealthy

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## Role of Research in Planned Giving

5. Net worth is indicator, as is # of children
6. Recipient of services – *did your cause do something that affected them?*
7. Do they want to leave a legacy?
8. No database can track loyalty except your own

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## Managing Data

- Learn moderation!
- Most unpalatable part of fund development –inner circle only
- Cookie crumbs tell where you’ve been
- Don’t put anything in file you wouldn’t want donor to see – they can!
- Prospect Management = action > progress

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## Exercise – Interpreting Data

1. Profile Review
2. Taking Action on Information

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