

MID-NOVEMBER 2007

Searching for Prospects



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A service of the Corporation for National and Community Service - Resource and Fund Development Initiative

Dear “In Search of Prospects” Colleague,

Sometimes what you don't know can hurt you. Learning as much as possible about a prospect allows you to make the best decisions as you cultivate or when it comes time to solicit someone. Click on the titles on the right to learn about why and how...

It Pays to Know

Find It for Free

Use Discretion

Do you have questions about searching for donor prospects for your program? Contact us through LEADline@CampaignConsultation.com. Access previous issues of On-the-Go eTA by clicking on the title at the right to learn more information.

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It Pays to Know

So what information is valuable to your program and how would you use it? The following chart provides useful topics and how that information can help you make strategic solicitations.

It pays to know

because it reveals

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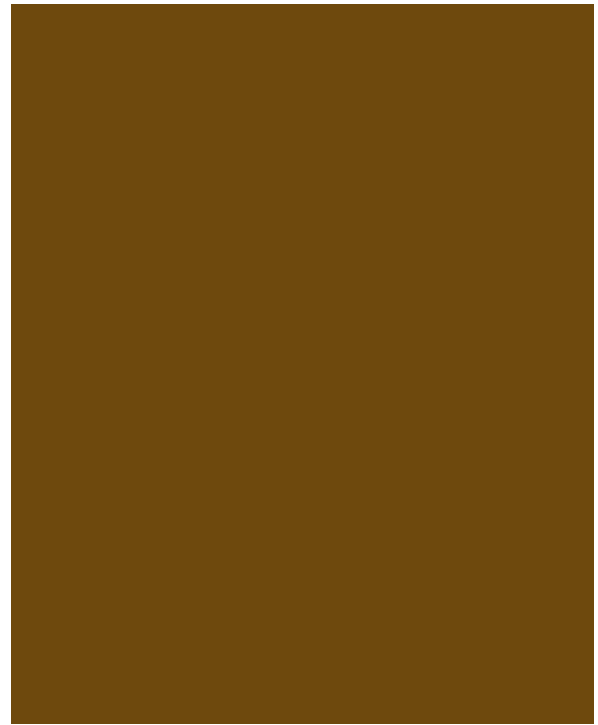
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prospects'because it reveals...
Family History	<ul style="list-style-type: none">• Connections to family wealth• Family ties to your mission• Relatives who might have connections to your board/supporters• Descendants – planned giving options to support your program
	<ul style="list-style-type: none">• Social connections with your Board/Supporters• Social connections with other prospects/people you want to get to know



Friends and Associates	<ul style="list-style-type: none"> • Social connections with people interested in similar missions who might support your project • Potential for involvement with your board • Understanding of nonprofit function/empathy
Business Affiliations	<ul style="list-style-type: none"> • Tie-ins to your 'business line' • Potential for in-kind donations (<i>if pivotal figure in the business</i>) • Understanding of your line of business/familiarity with field • Business connections with your board/supporters • Business connections with other prospects/people you want to get to know
Charitable Giving History	<ul style="list-style-type: none"> • Types of charities/missions supported (interest) so you can target solicitation appropriately • Size of average gifts • Local, regional, national/International level of focus
Community Interests	<ul style="list-style-type: none"> • Local focus of charity/involvement • Indication of investment in local community • Experience on nonprofit

Share Square

Your fundraising volunteers may be your best source of information. Be certain to make time to talk with them about your prospects.

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	<ul style="list-style-type: none"> • Experience on nonprofit boards • Connections to other potential prospects
Worth of Assets	<ul style="list-style-type: none"> • Types of assets – liquidity and accessibility • Snapshot of financial position • Relative capacity to give
Outstanding Obligations	<ul style="list-style-type: none"> • Disposable income limits • Potential barriers to giving (<i>i.e. court settlements, etc.</i>)
Net Worth	<ul style="list-style-type: none"> • Balance of assets vs. outstanding obligations • Clearer picture of capacity to give

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Find It for Free

Research will help you more thoroughly understand your donors and prospects, their interests and their capacity for giving. You can get easily accessible prospect information by questioning your own volunteers and community leaders who often gladly will bring new donors from among their lists of friends. To dig deeper, though, you may need to search public records to find assets and interest indicators.

[Click here to find free resources you can use to help you get started with your information search.](#)

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Using Discretion

All of the information you are able to acquire through research is readily available to the public even if it takes some searching. However, just because information is available does not always mean you want it to be part of your organizational records. Here are four reasons for not including a record of some prospect research:

1. **Unrelated to purpose:** The research may not relate to your mission and strategic solicitation purpose.

*Research in advance:
“There will come a time
when big opportunities
will be presented to you,
and you’ve got to be in a
position to take
advantage of them.”*

Sam Walton,
Founder of Wal-Mart, Inc.

2. **Prospect embarrassment:** Do not include if there is any chance that your prospect would be embarrassed if they knew you had this in your files.
3. **Jeopardize character:** Do not include in your folder if file content could jeopardize the character of a prospect, do not include in the folder.
4. **Volunteer trust:** Do not include too much personal information if it may alarm volunteers who have access to the profiles.

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Let us know

Have you found other ways to locate donors for your program?

Contact us at LEADline@CampaignConsultation.com (LEADline is sponsored by the Corporation for National and Community Service through its Resource & Fund Development Initiative.) We would be happy to answer questions or to give you more support.

Thank you for your interest in On-The-Go eTA, We encourage you to **send this and other issues of OTG eTA to friends and colleagues** who would benefit from the information. Also, if you're on information-overload, you may request **email removal**. Otherwise OTG e-TA will be back soon with another edition.

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Details from above:

Free Research Sites

1. ZILLOW is a real estate page that searches over 70,000 homes. You can find the value of a specific property if you have an address, or you can research the value of homes in a community at <http://www.zillow.com>
2. Birthday Database.com will lead you to someone's birth date. Send your fundraising leaders a birthday card. <http://www.birthdaydatabase.com>
3. Zabasearch can locate addresses and phone numbers and also provide birthday information. <http://zabasearch.com>
4. Campaign Finance Search Form searches political contributions and will let you know about a donor's political affiliation if that is important to your organization. <http://herndon1.sdrdc.com/fecimg/norindsea.html>

5. Ziggs Search for Professionals searches executives or company names for biographies and links to corporate websites. <http://www.ziggs.com/apps/myhub/MyHub.aspx>
6. Zoom Info provides information on corporations and executives. <http://www.zoominfo.com>
7. The Foundation Center provides valuable private and corporate foundation information. You can look at IRS 990 forms and get names of trustees and board members along with information about grants made. <http://foundationcenter.org>
8. David Lamb's Prospect Research Page provides a list of searchable data bases some free, others for a fee. <http://www.lambresearch.com>
9. ...and finally, don't forget **Google**. It's amazing what's out there on the web. If you've never googled yourself, try it.

[Click here to download a free prospect research form to organize your individual prospect research.](#)

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Resources

The National ASK (Awareness, Skills, Knowledge) to Sustain Institute, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 1998, 2002

The CNCS Resources Now! National Institute, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 2005-07

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Learning Products and Services

LEADline:

(Learning Experiences At a Distance) LEADline is designed to give information fast. Have a resource & fund development question? Use LEADline and within 24 hours you will receive response and advice from a fundraising professional.

Contact us

LEADline@CampaignConsultation.com

GIZMOs:

(Giving Information for Zooming Money Objectives) GIZMOS are resource and fund development tools for you and your volunteers. They are tangible products in packets, pocket brochures, CD-Roms, games, etc. They feature a myriad of fundraising topics such as The Power of Direct Mail, an interactive cd-rom and detailed companion booklet on developing your direct mail program. To order, contact us through LEADline@CampaignConsultation.com or call 410.243.7979 or toll free at 1.877.243.2253

The Chronicle of Philanthropy:

Everyone who comes to a Resources Now! National Institute gets a free subscription to the Chronicle for a year. Participants in CNCS Campaign Consultation workshops receive the latest issue free of charge plus a \$20 discount on one year's subscription.

Workshops/Clinics:

The Corporation for National and Community Service (CNCS), through its T/TA service provider Campaign Consultation, Inc., offers a three-hour workshops and clinics for those interested in mastering key skills need to write for individual donors.

Online Courses/Webinars:

Web course delivery of topics pertinent to resource development such as — **Build Fundraising Volunteer Champions** and **Cause Related Marketing and Corporate Partnerships**. Available through the Resource Center at <http://nationalserviceresources.org>

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Read Back Issues of OTG e-TA

- [November 2007 Budgeting for Fundraising](#)
- [Mid-October 2007 Raising Unrestricted Funds](#)
- [October 2007 Public Sector Fundraising](#)
- [September 2007 Revenue Generation](#)
- [July 2007 Using Celebrities](#)
- [Mid-June 2007 Foundation Proposals](#)
- [June 2007 Brochures, Newsletters and Websites](#)
- [Mid-May 2007 Women as Donors](#)
- [May 2007 Postage and Mailing Rates](#)
- [Mid-April 2007 Phonathons and Thankathons](#)
- [April 2007 Annual Fund Mailing Lists](#)
- [Mid-March 2007 Face-to-Face Asking](#)
- [March 2007 Government Funding](#)
- [Mid-February 2007 Rural Fundraising](#)
- [February 2007 Stop-gap Funding](#)
- [Mid-January 2007 Nonprofit Branding](#)
- [2006 Archives](#)

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