

## GIJP Conference 2011

### **“Know Your ‘Rights’: Prospect Research Leads to Larger Gifts” Resources & Links for Research Dan Kirsch, GIJP Mentor**

#### **PROSPECT RESEARCH GUIDES**

**NOZA’s Prospect Research Workbook.** Published by the leading vendor in the donor data management field, but the information is well presented and the “sell” for their products services is understated.

[https://www.nozasearch.com/pdfs/noza\\_prospect\\_research\\_workbook.pdf](https://www.nozasearch.com/pdfs/noza_prospect_research_workbook.pdf)

**Information Fundamentals of Prospect Development: Research and Applications.** From Marts & Lundy, a venerable fundraising consulting firm.

[http://majorgivingnow.org/downloads/pdf/Fundamentals\\_of\\_Prospect\\_Research.pdf](http://majorgivingnow.org/downloads/pdf/Fundamentals_of_Prospect_Research.pdf)

#### **META RESOURCES**

**Portico** – courtesy of the University of Virginia’s Prospect Research Team. This is a great place to find links for all kinds of free research sources. Arranged by data type (real estate assessments, stocks, campaign contributions)

<http://indorgs.virginia.edu/portico/home.html>

**Prospect Research Page** from David Lamb Target Analytics Senior Consultant (and former GIJP Conference Presenter)

<http://home.comcast.net/~lambresearch/index.html>

#### **DAN’S FAVORITE “GO-TO” SOURCES**

Google <http://www.google.com/>

Guidestar <http://www2.guidestar.org/>

Zillow <http://www.zillow.com/>

Local Real Estate Tax Assessor Sites

Yahoo Finance <http://finance.yahoo.com/>

State Corporations Databases

Fund Race - Federal Campaign Donor (check for individual state databases,too!)

<http://fundrace.huffingtonpost.com/neighbors.php?type=loc&oldest=1&addr=&zip=01062&search=Search>

Facebook/LinkedIn/Twitter

## **PAY SERVICES**

For large scale wealth screening as well as ongoing access to online data search capabilities.

Request Free Screening of ~ 500 Records. Request trial period to test individual search function.

Wealth Engine – the oldest, most well-known donor screening/research service

<http://www.wealthengine.com/>

Donor Search – created by former Wealth Engine executive. Value proposition is based on access to data on previous philanthropy. Wealth estimates tend to be more conservative than Wealth Engine's.

<http://donorsearch.net/>

Blackbaud Analytics – from the 800-lb. gorilla of the donor data management software industry

<http://www.blackbaud-analytics.com/wealth-screening.htm>

NOZA calls itself the world's largest database of charitable donations. Now a part of Target Analytics/Blackbaud

<https://www.nozasearch.com/>

iWave/Prospect Research Online

<http://www.iwave.com/>

DonorScape from Grenzbach Glier & Associates Consulting (this is the one the ACLU used – see below)

[http://grenzglier.com/analytics/prospect\\_analysis\\_with\\_donorscape](http://grenzglier.com/analytics/prospect_analysis_with_donorscape)

## **FACE TO FACE “RESEARCH”**

From The Osborne Group and reference on the GIJP Knowledge Center, a great list of questions to use while meeting with prospects to learn more about themselves, their values, their philanthropy, and their views of your organization.

<http://www.gijp.org/uploadDocs/3/Stewardship%20%20-%20sample%20questions%20Osborne%20Group.pdf>

## **ETHICS**

From the APRA [Position Paper on Privacy](#): *The availability of information in the public domain does not drive the collection of data nor supersede ethical principles and practices in its use.* Although information that is public now will probably not go away, what we do with that information is driven by the kind of relationship we want to develop with our constituents. It is a relationship of respect, trust, and of mutual endeavor toward a common goal. The information will be there, but our organizations may not be if we violate that relationship.

**White Paper by Target Analytics Senior Consultant (and former GIJP Conference Presenter) David Lamb, “Privacy and the Prospect Researcher”**

<http://www.blackbaud.com/files/resources/downloads/cam/PrivacyandtheProspectResearcher.pdf>

**Statement of Ethics from the leading association of Professional Prospect Researchers**

<http://www.aprahome.org/ProfessionalStandards/StatementofEthics/tabid/74/Default.aspx>

**2010 Wall St. Journal article on prospect research, "Smart Money: Is your Favorite Charity Spying on You?"**

[http://online.wsj.com/article/SB127396687577792419.html?mod=WSJ\\_hpp\\_MIDDLENexttoWhatsNewsSecond](http://online.wsj.com/article/SB127396687577792419.html?mod=WSJ_hpp_MIDDLENexttoWhatsNewsSecond)

**2004 New York Times story re: controversy over prospect research at the American Civil Liberties Union**

<http://www.nytimes.com/2004/12/18/national/18aclu.html?pagewanted=print&position=>

And, in case you're interested, news on the ACLU's "historic fundraising success" 6 years later

## **ACLU Capital Campaign Raises \$407 Million**

The New York City-based [American Civil Liberties Union](#) has announced the completion of its Leading Freedom Forward campaign. The largest-ever fundraising effort on behalf of an American civil rights and liberties organization raised \$407 million, far surpassing the organization's initial \$250 million goal.

<http://www.aclu.org/organization-news-and-highlights/aclu-announces-historic-fundraising-success-exceeding-goal-and-buil>