

Rules and Research

Practical Strategies for Finding the Donors You Want

Fundraising is essential: It puts the gas in the tank.



What We'll Learn

- Today: Some fundamentals about the donor relationship and prospect research basics
- March: Case and Context: How do you describe your work in a way that makes people care? What are the hooks in your community, the news environment that help people understand your work? How can collaborations help people understand your value?
- April: Moves Management: How can you keep track of the conversations you have with donors and prospects? What's the next step, and how do you know?

The Rules

- People give to people they know.
- People give because they are asked.
- If you ask, you may get.
- If you don't ask, you won't get.
- A persuasive case is about how the *donor* benefits. It's not about you!

Defining Donor Benefit

There are a range of ways donors benefit from a gift – perhaps there's a tangible good or service they receive (attending a gala or VIP reception with a celebrity), a tax break, a means of doing or repaying a favor for a friend or family member. But the most generous gifts come from a strong and strategic sense of your organization's work complementing their goals, amplifying the impact of their other philanthropy, advancing a shared mission or value.

A conversation about how the donor benefits begins with understanding what's important to them. The first step in that process involves research.

Research Goals

- **Identifying likely donors**
 - Who shares your values/cares about your community?
 - Who gives to similar organizations?
- **How to make your case to them**
 - How would they benefit from supporting your work?
 - What motivates them?
 - How do I get in front of them?

Identifying likely donors

- Internal assets
 - Donor history
 - Email subscriber/member lists
 - Review these w/ board members, staff, stakeholders, collaborators and ask for their additional ideas
- External Resources
 - Annual reports/donor lists from local organizations – colleges/universities, United Way, YMCA
 - Political contributions
 - Donor databases
 - Google – news clips, profiles like Giving Pledge or Forbes 400

Donor databases

- The most useful data will be info you already have and the info you get from conversations with others.
- Google fills in a lot of blanks!
- But there are a few instances where making an extra effort to access proprietary databases like Candid's Foundation Directory Online (FDO):

Find the right funders now.

SAVED SEARCHES

Close Advanced Search & Filters

Subject Area

What needs funding. Ex: Biodiversity, Education

Geographic Focus

Where funding will be used

Population Served

Who will be affected. Ex: At-risk youth, Veterans

Organization Name

Name of specific grantmaker or recipient

Location

Location of grantmaker or recipient

Who's Who ?

Someone serving in organization

Include U.S. Federal Funders

Additional Filters

SEARCH

Specialized databases: Using FDO to ID other organizations' donors and gift amounts

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Specialized databases: Identifying a prospect's board affiliations

Accessing FDO for free:



- You don't have to pay for FDO; many libraries collaborate to make the database (and other fundraising research assistance) available and you can search by location.
- Librarians are your friends! Don't hesitate to ask at your municipal or local college/university library if you don't see a resource near you.

Specialized databases: political giving

DONOR LOOKUP

This database contains millions of records, so try to be as specific as possible when submitting a query as it will significantly reduce the time it takes to receive your results. If you have questions, concerns, or technical problems, please contact us at apis@crp.org

FIRST AND LAST NAME OF DONOR

First and Last Name

ELECTION CYCLE

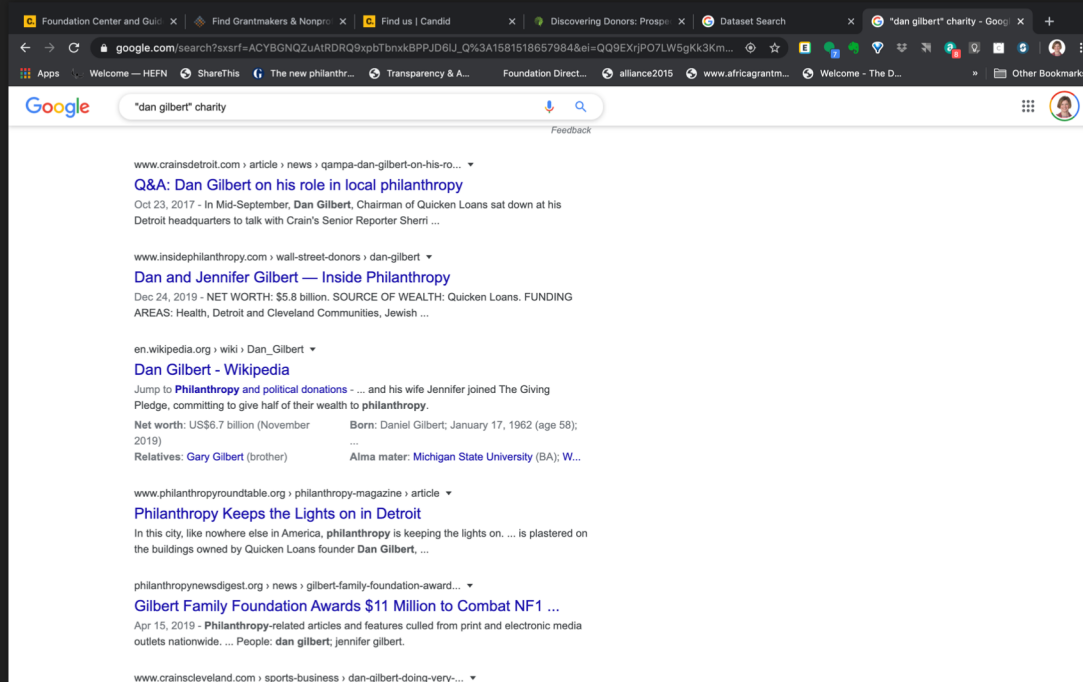
All Cycles

STATE OF DONOR

All States

- OpenSecrets.org is still the best resource for ID'ing political gifts.
- FEC.gov is more current but clunkier to use.
- Remember that political giving is not tax deductible/can't come out of a foundation or DAF so is a helpful guidepost in terms of capacity.

Rounding out a prospect profile



- Google sweep: “prospect name” + philanthropy or charity will call up many resources relevant to their giving

Rounding out a profile

Good resources for accurate profiles:

- [Chronicle of Philanthropy](#) (some content paywalled)
- [InsidePhilanthropy](#) (first eight articles free)
- [Forbes 400 /Real-Time Billionaires](#) (free)
- [Giving Pledge](#) (free)
- Bloomberg News [Billionaires](#) list and individual search (basic profile free, details board seats, professional affiliations, compensation/stock options)
- [Philanthropy News Digest](#) (free)
- Google's [Dataset Search](#) can sometimes help pinpoint a name in a 990, SEC filing, or other resource
- Media Impact Funders' [Media Grants Data Map](#)

Elements of a Profile and Pitch

Desk research should tell you:

- Approximate age
- Basic biographical detail/family connections
- Recent philanthropy and political giving history
- Board memberships/professional affiliations
- Capacity range

Armed with these facts, you can articulate:

- Why this prospect might be interested in your work;
- How it advances giving or other work she's already engaged in;
- A specific project, program, or achievement to focus on in your introductory outreach, if applicable;
- A target gift range.

The Human Touch

- Now that you know a bit about your prospect, time to workshop that within your own network. Who knows this person? Are you working with other organizations she funds?
- Desk research gets you down the road, but using it as a way to find peer-to-peer connections to the prospects you want will make it exponentially more effective.
- A benefit of prospect research is its opportunity to turn up names you might not have thought of, so even as you're soliciting input on what your desk research has identified, also ask for suggestions of other prospects or connectors.

Exercise: What can you learn about these individuals?

- Linda Gruber (California)



- Stephen Polk (Michigan)

