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Prospect Research Checklist

Questions to answer before first meeting

1. *Why does the donor care about your issue?*
2. *What can we realistically hope the donor might donate in the next 12-24 months?*
3. *Who are the people who should be involved in contacting the donor?*

Sources to check at the Foundation Center (check out the reference section of the main library)

1. *Donor search database* A list of both political and philanthropic contributions. Scan for (a) the size of gifts, (b) the type of organizations the donor supports, (c) political party affiliation,
2. *Corporate affiliations database*
3. *Who's who* information about education, professional accomplishment, civic engagement.
4. *Foundation Directory* Check the "Trustees, Officers, Donors," field on the Grantmakers screen.
5. *Social Register*. All the best families....

Sources to explore online from your own office

1. *Guidestar.com* (free registration required) 990's (tax returns) for all tax exempt organizations, including grantmaking foundations. 990's provide helpful information about the size of a foundation, the organizations it supports, the officers and their titles.
2. *Google.com* Try different combinations: all variations of name, name and city, name and state, name and "philanthropy." If you don't know the individual's business, type in their business phone number or a portion of their business address.
3. *Real estate databases*. Many states have online databases that show sale values and owners for any given address.
4. *realestate.yahoo.com/Homevalues* Determine prices of homes recently close to a given address.
5. *Fec.gov* lists all political contributions. This will give you insights into both the political leanings and capacity.

Notes

1. **Print bios** wherever you find them for the donors files.

2. **Use your imagination** to put together a personality sketch of the donor. There is nothing wrong with wild speculation; replace it with solid information as you get closer to the donor, and always differentiate between what you know and what you believe.
3. **Use your judgment** in sharing with a particular donor information about him or her. Some people are touchy about being investigated, some are flattered by the attention, and most simply expect you to be prepared for your meeting with them.
4. **Always keep track of the sources of information.** You will run into contradictory information, and knowing sources allows you to verify and reconcile.
5. **Integrate what you learn from online research about donors with what you learn through social channels or the donors themselves.** This is the best way to create a complete profile.