

Prospect Research – What Should We Be Capturing?

The other day, a former student of mine told me he was doing prospect research for a nonprofit, and wondered what I thought he should be documenting about each individual. He shared with me the things that were on a standard form he'd gotten from an instructor – a list I thought fell short of optimal.

Here's what was on the original list:

- affiliation to this org
- position
- business address
- home address
- birthdate
- education
- family
- interests
- career
- professional affiliations
- community affiliations
- honors/awards
- gifts to this org
- gifts to other orgs
- assets (real property, compensation, investments, other)
- recommendations
- researcher
- date

What I would add:

- how they prefer to be addressed (Ms. vs Mrs., Dr., NOT the formal name on their check, preferred nickname, etc.)
- how they prefer to be communicated with
- spouse/partner (where do they work, what are their interests, etc.)
- what was their point of entry into the org (friend of board member who brought them to event, signed something at fair booth, served by org (or family member served), etc.)
- which aspect of org interests them most
- how have they been engaged (volunteer, attended events, responded to online survey, purchased product with our logo, participated in focus group, etc.)
- did they initiate each of above contacts or did we?
- who else do they know or connect with in org?
- do they have kids? how old? where in school? in sports/music/ etc.?
- do they have pets? what kind? (dog, cat, horse, birds)
- what do they drive (Hummer or Prius)?

- are they vegetarian/vegan? Do you know why? (physiological/allergy or political/environmental choice) (May drive where you meet them for lunch or how you plan for refreshments at reception or house party)
- do they drink alcohol? If so, beer/wine/spirits? If not, religion/values/recovery?
- influenced by a particular religion? (Jews would understand levels of tzedaka, feel compelled by tikkun alum, Catholics might respond to guilt, which would not work with a Unitarian who might be compelled by their 7 principles, Baptists might feel called by God, etc.) even if not currently practicing that religion, may still be influenced by it)
- which of the seven donor types do we think they are in relationship to us, and what evidence leads us to believe that? Therefore, what types of messages will resonate with them?
- Meyers-Briggs type or Enneogram or colors or whatever
- seem more responsive to emotions or facts, stories or statistics?

The problem is that in order to get this information, we need to be in conversation with the individual, asking questions, listening for clues that they drop as they speak with us, email us, or attend gatherings. My clients say, “We don’t have time to be ‘in relationship’ with that many people!” To which I respond, “Then what else are you doing with your time? What is more important than investing in the people who are sustaining your organization?” So we need to figure out what to let go of so that we CAN be in relationship with the people who care about and support our work. They are longing to be known by us, to be in partnership with us. As one former student, Josef Krebs, said, “Donors give because they want to change the world. Our job is to help them participate in the change they seek.” So let’s spend more time connecting with our donors, and listening to what they tell us about themselves. That’s much richer than any data you can glean from searching the Web!

P.S. One student doing prospect research for nonprofits expressed disappointment that the staff didn’t seem committed to adding information to what he’d learned. He assumed that those in contact with the donors would refresh and update relevant information after each contact, but they didn’t. So be sure to remain curious, and capture what you discover as your relationships with stakeholders unfold.

P.P.S. A speaker I heard offered these things to ask/learn about our donors:

- * what traditions inform their generosity
- * what community do they feel affinity with
- * their family background
- * what matters to them (not us)
- * alternatives they see to our approach or purpose we might not have considered
- * what they would like to accomplish with their philanthropy/generosity