ProspectView Screening User's Guide

Screening for Support

How many major supporters are hiding in plain sight in your donor or prospect lists? How much more support are your current donors capable of giving? How should you approach your top prospects?

And, most importantly, how can you use your development resources most efficiently to further your mission?

DonorSearch's ProspectView Screening is the perfect fit for any size organization searching for a cost-effective way to increase its fundraising results by gaining valuable insight into its donor base. Whether you're looking for new major gift prospects, trying to maximize donations from your most loyal donors, or seeking additional donors for your annual fund, DonorSearch can help.

ProspectView screens your donor list using data from 30 public and proprietary databases, including the largest charitable database in the industry. Then we use sophisticated modeling and analytics based on $5 billion in known giving to 400 nonprofits to find donors with both the inclination and capacity to be philanthropic to your organization.

By combining traditional wealth markers with philanthropic information, **DonorSearch has created the most comprehensive philanthropy research tool available.**

The result: ProspectView averages 15-20% more prospects of interest per screening.

In addition, DonorSearch's in-house prospect researchers manually assess and vet the top computer-generated prospects in every file, or as many prospects as you wish, at prices far below what you'd pay for your own in-house vetting.

This means that DonorSearch screening output needs little to no verification before you use it, has an **accuracy rate of 85-90%** on the top prospects (compared to the industry average of approximately 70%), and is more actionable than anybody else's data. With DonorSearch, you'll spend less time in the office with data, and more time in the field raising money!

ProspectView Screening includes three valuable services at no extra cost:

- Free import of DonorSearch data into Raiser's Edge or any other DMS/CRM software
- Free, unlimited training for as long as you're a DonorSearch client
- Free, unlimited telephone, email and chat support for as long as you're a DonorSearch client

ProspectView Screening also includes three valuable tools

- Comprehensive philanthropic and wealth reports on every prospect, delivered as a pdf for ease of use
- An Excel-style table with key data on every prospect, ready to sort, filter, organize and output
- An Executive Summary that provides a valuable overview of your donor file, highlights the top 50 prospects in several categories, and compares your donor list to industry averages

The following pages demonstrate how to use the full capabilities of ProspectView Screening. If you have any questions about your ProspectView Screening results, please contact Client Support at 410-670-7880 or clientsupport@donorsearch.net.

Table of Contents

ProspectView Screening Data Sources

Philanthropic Databases

1. DonorSearch's Annual Report Philanthropy Database
The second largest collection of charitable giving data available anywhere, this proprietary database is growing by 500,000+ records per week, and includes over 85 million gifts. It also has hard-to-find print references and Internet-based annual reports harvested from nonprofit websites. This comprehensive collection spans 17 years, with millions of records from the mid to late 1990's, even better coverage for each year of the previous decade, and one of the fastest growing collections for 2010-2014. It also identifies many members of Boards of Directors for organizations across the country. This database provides giving information that was previously published on the Internet but is no longer available, as well as the broadest collection of printed documents not available elsewhere.

2. GuideStar Foundation Trustees
This database is a list of the foundation trustees and board members for approximately 50,000 personal, family, and corporate foundations, and is one of the single best markers of future philanthropy. Trustee information includes name, title, year reported, corpus and more.

3. DonorSeries Directors Report
DonorSeries Directors Report, also known as Waltman's, provides thousands of entries for individuals and their primary affiliation with corporate boards of public firms, foundation boards, and major nonprofit boards from arts, social services, education and health organizations, as well as civic boards.

4. FEC Political Giving Database
Lists every political contribution of $200 or more over the past 25+ years for federal campaigns, approximately 14 million records. During evaluation of the prospect inclination and capacity to give, the presence of Federal Election Commission regulatory records can be one of the most powerful predictors of an individual's future charity. Most records also include individuals' occupations or employers. The database is updated monthly.

Wealth Databases

5. DonorSeries Charitable Donations Database
DonorSeries Charitable Donations Database, also known as Waltman's, has over 5 million records collected from printed annual reports, event programs, and other published sources. Many records of donor histories are tracked over the last 10 years. Some records may even include individuals' college graduation years.

6. Reuters Market Guide Insider Profiles Market Guide
In-depth information on over 10,000 public U.S. companies. It also collects and summarizes additional information from proxy statements for SEC insiders on individual sectors or industries of the U.S. economy from regulatory filings and corporate annual reports.

7. LexisNexis Real Estate Property Records
One of the leading national compilers of real estate and property, with information on over 120 million properties across the United States, including assessment and tax information, as well as neighborhood real estate demographics.

8. Shalewealth
A DonorSearch exclusive, this database lists 130,000 landowners with mineral rights leases in the Marcellus Shale region (PA, OH, WV). These are some of America's newest philanthropists.

ProspectView Screening Data Sources (2)

9. DonorSearch Real Estate Property Records
Our in-house real estate database with records for 150 million properties, compiled from county records.

10. Marquis Who's Who Biographies
A compilation of information from more than 15 directories, including Who's Who in America®, with concise biographies of over 900,000 leaders and achievers from around the world from every significant field of endeavor.

11. GuideStarNonprofit Boards of Directors
The national database of U.S. charitable organizations, with data on more than 850,000 IRS-recognized nonprofit organizations. GuideStar accesses the IRS Form 990 filed by organizations which reports on the operations and finances of charities.

12. Dun & Bradstreet (D&B) Business & Executive Information
Duns Marketing Identifier (DMI) files of business records with contact names, titles, D&B Executive at Home Address Records, and D&B Biographical Records. With 14 million records, this is one of the largest and most well-known sources of information about privately-held businesses and their executives.

13. Securities and Exchange Commission Data
SEC insider trader transactions (1986 to present) and current holdings for stocks, options, and other derivatives as reported on Forms 3, 4 and 5. The information is collected to comply with the regulatory requirements of the Securities and Exchange Commission (SEC). Individuals who are generally the policy makers of a publicly traded company must provide information to the SEC whenever they make a stock transaction. Specifics include detailed stock and options transactions.

14. FAA Aircraft Owners
Profiles all owners and partial owners of aircraft licensed in the U.S., including a description of the aircraft, a list of all owners, and the address of the managing owner. While aircraft ownership is often viewed as an outward sign of wealth or disposable income, statistically aircraft owners are less generous than people who are not. The file contains information about private and commercial aircraft, including air balloons.

15. Larkspur SEP/Keogh Pensions
Information on deferred income of self-employed individuals and over 2.5 million qualified pension plans.

16. IRS 527 Political Donors
This is an often overlooked source of giving information. Most known for the role they played in the recent presidential elections, 527 organizations can collect contributions of any size. New data is available quarterly.

17. IRS 527 Directors
IRS 527 Directors are often political activists in their community who organize and operate the 527 organizations. The IRS 527 directors are the principal contact persons for learning more about the organization and its finances. This database is updated monthly.

ProspectView Screening Data Sources (3)

18. U.S. Coast Guard
A file of all vessels, whether individually or corporately owned, including a summary of the vessel's highlights. Boat ownership can be viewed as an outward sign of wealth or disposable income, but statistically boat owners are less generous than people who do not own boats. The file contains information about recreation and commercial boats and vessels.

19. FAA Airmen
This is the official name of the file published by the Federal Aviation Administration, although it includes the names of all certified pilots, regardless of gender. Files include the name, home city, state, and zip, and the approved certifications of each individual, whether the address is domestic or foreign.

20. IRS 7806 Exempt Organizations
The definitive list of nonprofits and foundations currently certified as tax exempt. The files are updated monthly to quarterly.

21. IRS 990PF Profiles
A complete list of 100,000+ grant-giving foundations, including assets under management, organization title, and contact information.

22. CorpTech Business Profiles
Corporate Technology Information Services, Inc. (CorpTech) provides detailed information on over 95,000 private technology company executives.

23. Who Knows Who
Who Knows Who lists the names of thousands of corporate board members, foundation board members and nonprofit board members when an organization is referenced in a profile. This is an invaluable guide on relationships your board members or donors may have with other potential prospects.

24. RW Athletes Database
A list of professional athletes from many of the premier professional U. S. sports leagues. Information includes birthplace, age, team, position, and salary for athletes from MLB, NFL, NHL, NBA, the PGA Tour, the LPGA Tour, ATP, WTA and the Sprint Cup NASCAR Series. Compiled from various sources, it is one of the most diverse collections of data on athletes available.

25. Zip-codes.com
Zip-codes.com provides access to U.S. Census data, and gives DonorSearch the ability to provide an ranking of prospects based on average income and average home value in the prospect's community.

ProspectView Screening Data Sources (4)

Links and Images

26 Google Intelligent Links
One-click keyword searches are available in profiles for donor recognition name matches and the recipient nonprofit, D&B executive matches and the associated company, FEC donor matches and the associated employer, and Market Guide executive matches and the associated employer.

27. Annual Report Document Library
DonorSearch's proprietary annual report database includes tens of thousands of links to current, historical, and out-of-print electronic and paper annual reports and donor recognition documents. This database also provides full text of annual reports and access to photos, original gift listings, and board information.

28. FEC Source Images
Our FEC data includes one-click access to millions of campaign contribution forms. On these forms you can see how the campaign listed the gift, including the donor's name, employer, and street address at the time of the donation.

29. SEC Source Images
Our SEC data includes one-click access to millions of Securities and Exchange Commission electronic filings. This data includes easy access to narratives and explanations, indirect holding descriptions and connections, and live links to company information.

30. Million Dollar Donors
A manually assembled file that consists of 65,000+ million dollar donors collected from a variety of publically available resources –press releases, annual report, articles, funding reports and more. Data spans 15 years and is updated regularly.

Totals Table: At-A-Glance Info and Giving to Your Organization

DS Rating	Quality Score	Profile	RFM Total	Last Gift Date	Total Gift Amount	# Of Gifts	Age	Date of Birth	Phone Number	Address
Expand	Min: Max:		Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:		
DS3	15.2	Profile	203	12/20/2012	675	7	0		269-544-2405	6610 Isabelle St.
DS1-3	16.2	Profile	112	12/26/2006	700	4	0		269-342-9161	3510 Bronson Blvd.
DS1-1	15.4	Profile	188	04/06/2010	1250	9	0		269-382-2326	4166 Old Colony Rd
DS1-2	14.7	Profile	265	04/26/2013	1490	19	0		269-870-0703	471 W South St. #102
DS1-1	17.9	Profile	221	11/28/2012	845	10	0		269-381-7650	8391 N. 26th St.
DS3	14.9	Profile	208	12/31/2012	305	9	0		269-343-1861	1112 1 2 Oak St.
DS1-2	14.2	Profile	159	05/05/2009	910	8	0		269-345-2180	3001 Essex Rd
DS1-5	15.7	Profile	181	04/12/2010	2042	6	0		650-325-5978	6 Manor Pl.
DS1-3	12.2	Profile	132	12/31/2012	135	2	0			1120 Lakeway Ave
DS1-3	15.6	Profile	184	08/13/2009	8500	7	0		269-629-9520	523 S Gull Lake Dr.
DS1-1	15.1	Profile	75	12/10/2008	1000	1	0			2002 Lakeshore Dr.
DS1-2	14.0	Profile	142	12/31/2012	200	2	0		269-342-5302	1415 Holiday Lane
DS1-2	15.0	Profile	186	09/18/2012	650	5	0		269-372-2712	7130 Arbor Valley Ave.
DS1-5	13.2	Profile	143	09/03/2009	440	8	0		269-349-2330	8225 E H Ave.
DS1-1	18.2	Profile	221	09/06/2012	21200	5	0		269-382-2517	1028 Essex Cir.
DS1-3	15.4	Profile	154	06/05/2013	200	2	0		269-381-4468	1435 Long Rd.
DS1-3	17.8	Profile	88	12/31/2012	50	1	0			2643 Sleepy Hollow Dr
DS1-1	14.4	Profile	291	06/28/2013	16083	18	0		269-382-0049	1808 Greenlawn Ave.
DS1-5	12.8	Profile	176	12/31/2012	230	5	0		269-345-8709	2220 Sheffield Dr.
DS1-5	18.9	Profile	214	01/07/2013	520	7	0		269-342-2171	3124 Hill An Brook Dr.
DS1-1	20.0	Profile	214	12/28/2011	20000	6	0			1325 White Oak Dr.
DS1-5	17.0	Profile	27	05/11/2009	100	1	0			2033 Saxonia Ln
DS1-5	14.2	Profile	217	09/06/2012	950	11	0		269-349-5898	1427 Academy St.
DS1-3	13.5	Profile	97	12/29/2010	200	2	0			10121 Graefield Ct

The first few columns of the Totals Table provide a quick snapshot of each donor's philanthropy and wealth, a link to a full profile, and giving information provided by the organization. If the organization has provided birthdate, age, phone number or address information, or purchased that information from DonorSearch, it will appear as well.

Data fields include:

DS Rating: A ranking of a prospect's ability and propensity to make $5,000+ donations. Explained in detail on page 20.

Overall: Confidence level of name matching to donor records. Anything over 17 indicates a high degree of confidence. Note that in the comprehensive Profile, each piece of data is individually scored for confidence.

Profile: A link to the prospect's complete wealth and philanthropic profile.

RFM Total: An internal analysis of the relationship you have with each of your prospects, using a formula that includes how RECENTLY your prospect has given to you, how FREQUENTLY your prospect has given to you, and the total amount of MONEY given. Scale of 1-300. 300 is the highest rating and indicates the greatest likelihood of donating. This analysis is only available if an organization has supplied giving data on a particular donor; prospects who are non-donors will not have an RFM score.

Last Gift Date, Total Gift Amount, # of Gifts: Shown if supplied by client; used to calculate RFM. One quick way to determine if a donor is capable of giving more to your organization is to compare the donor's giving to your organization with his/her giving elsewhere, which is shown in the blue section of the Totals Table.

DONOR SEARCH

Totals Report: Client Data Fields

ID	SP-First	SP-M	SP-L	Date Searched	Notes	Largest Gift Amount	Largest Gift Date	Last Gift Amount	
				Min: Max:		Min: Max:	Min: Max:	Min: Max:	M M
739				03/12/2015		$100		$100	
433	Michael		Fassler	03/12/2015		$200		$200	
468	Alex		Gardner	03/12/2015		$500		$50	
558	Deborah	Ann	Johnston	03/12/2015		$200		$55	
658	Jeannette		Maxey	03/12/2015		$100		$45	
1112				03/12/2015		$50		$50	
842				03/12/2015		$200		$100	
858	Robert		Spiegelman	03/12/2015		$500		$100	
00001-593-000...	Leslie		Reed	03/12/2015		$100		$100	
475	Mary		Godfrey	03/12/2015		$5,000		$500	
00001-593-000...	Phillip		Carra	03/12/2015		$1,000		$1,000	
2193	James	W	Carter	03/12/2015		$100		$100	
484	James		Greene	03/12/2015		$200		$200	
873				03/12/2015		$100		$100	
2127	Joan		Van Zoeren	03/12/2015		$10,500		$200	
1453	Rosemary	C	Willey	03/12/2015		$100		$100	
00001-593-000...	Josephine		Lombardo Arnold	03/12/2015		$50		$50	
618	Margo		Light	03/12/2015		$2,793		$55	
2075	Katherine	K	Shook	03/12/2015		$50		$50	
1533	Ann		Gianakaris	03/12/2015		$100		$100	
00001-593-000...	Sarah		DeNooyer	03/12/2015		$10,000		$2,000	
00001-593-000...				03/12/2015		$100		$100	
952	Sharon		Williams	03/12/2015		$175		$175	
00001-593-000...	Pam		Williams	03/12/2015		$100		$100	

Data supplied by the client will be in a column with a yellow header. This can include:

An ID number for each donor (if assigned by your organization)
Spouse's First, Middle and Last Names
Notes (if supplied by client)
Details on giving to your organization: Largest Gift Amount and Date, Last Gift Amount

Color Codes

To make it easier to find the information you want, the Totals Table headers are color coded.

Yellow: information supplied by client
Orange: analytics
Black: calculated scores and links
Blue: philanthropy
Green: wealth
White: analytics

Sorting and Filtering

Columns can be sorted and filtered using the same techniques as an Excel spreadsheet. Enter a value in the box at the top of each column to find only the records that contain that value. (For example, to find everyone in a given state or every donor rated DS1-1.) Click on the header at the top of a column to sort records in Ascending (A-Z) order. Click again to sort in Descending (Z-A) order.

Totals Report: Client Data Fields (2)

First Gift Date	First Gift Amount	User1	User2	User3	User4	User5	User6	User7
Min: Max:	Min: Max:							
01/20/2003	$100	Paulson,Ann,Q.,739					Home	PhH-739
12/31/2003	$100	Fassler,Anne,M.,433			E-Mail	PhE-433	Home	PhH-433
05/23/2002	$100	Gardner,Arlene,,468					Home	PhH-468
08/13/2002	$100	Johnston,Arnold,,558			E-Mail	PhE-558	Home	PhH-558
02/13/2003	$100	Maxey,B.,William,658			E-Mail	00001-517-000...	Home	PhH-658
01/07/2003	$30	Rensenhouse,Barbara,...					Home	PhH-1112
06/05/2002	$60	Smith,Barbara,B.,842					Home	PhH-842
06/05/2002	$500	Spiegelman,Betty,,858					Home	00001-517-000...
04/07/2010	$35	Reed,Bill,,00001-593-0...						
08/26/2004	$500	Godfrey,Brooks,,475			E-Mail	00001-517-000...	Home	PhH-475
12/10/2008	$1,000	Carra,Carol,,00001-59...						
01/03/2012	$100	Carter,Carol,A.,2193			E-Mail	PhE-2193	Home	00001-517-000...
02/11/2005	$100	Greene,Carole,,484			E-Mail	PhE-484	Home	PhH-484
09/30/2002	$50	Stroh,Charles,,873			E-Mail	PhE-873	Home	PhH-873
10/01/2007	$10,500	Van Zoeren,Charles,,2...			E-Mail	00001-517-000...	Home	00001-517-000...
05/03/2010	$100	Wattles,Charles,D.,1453					Home	PhH-1453
12/31/2012	$50	Arnold,Chester,C.,000...						
05/14/2002	$1,000	Light,Christopher,Upjo...			E-Mail	PhE-618	Home	PhH-618
12/30/2009	$50	Shook,Christopher,J.,2...			E-Mail	00001-517-000...	Home	00001-517-000...
01/22/2007	$100	Gianakaris,Constantin...			E-Mail	PhE-1533	Home	PhH-1533
12/20/2007	$2,000	DeNooyer,Craig,,0000...						
05/11/2009	$100	Addison,Cynthia,,0000...						
01/17/2003	$65	Williams,D. Terry,,952			E-Mail	PhE-952	Home	PhH-952
05/17/2010	$100	Williams,Dallas,,00001...						

User Fields can be used to store any information you wish: home and work phone numbers and email addresses, contact dates or whatever you wish. The Totals Table includes 20 User Fields; you may label and use any number of them when submitting your file(s) for screening.

Please note that information in the User Fields cannot be changed or updated without submitting a new file for screening.

Values in User Fields are not used in analytics; they are included for your convenience.

Totals Report: Philanthropy

Assessed	Assessment Questions	Total Of Likely Matches	# Of Gift Matches	Fnd Board	Fnd Corpus	GS Board	IRS 990PF	IRS PUB 7806
Y☐ N☐		Min: Max:	Min: Max:	Y☐ M☐	Min: Max:	Y☐ M☐	Y☐ M☐	Y☐ M☐
Edit	Edit	$0	0		$0	M		
Edit	Edit	$0	2		$0	Y		
Edit	Edit	$100,000	2		$0	M		
Edit	Edit	$1	2		$0	M		
Edit	Edit	$35,900	14		$0	Y		
Edit	Edit	$0	0		$0			
Edit	Edit	$0	1		$0	M	M	
Edit	Edit	$2	4		$0	M		
Edit	Edit	$0	0	M	$2,441,883	Y		
Edit	Edit	$0	1		$0	M		
Edit	Edit	$12,000	18	M	$27,434,209	M		
Edit	Edit	$711	5		$0	M		
Edit	Edit	$0	1		$0	M		
Edit	Edit	$0	2		$0	M		
Edit	Edit	$2,203,000	21		$0	M		
Edit	Edit	$5,100	17	M	$916,435	M		
Edit	Edit	$1,402	10		$0			
Edit	Edit	$18,700	35	M	$15,779,156	M		
Edit	Edit	$0	1	M	$13,748,020	M		
Edit	Edit	$500	6		$0			
Yes Edit	Edit	$13,200	10		$0	Y		
Edit	Edit	$1	2		$0			
Edit	Edit	$2,200	16		$0	M		
Edit	Edit	$0	0		$0	M		

Assessed: DonorSearch manually assesses the top 200 prospects in your database as quality assurance that all data is correct to an 85-90% level at no extra charge. Additional assessments may be purchased.

Total of Likely Matches: $ amount of all positive matches to outside giving history found for the record. This total does not include "maybe" donations.

# of Gift Matches: Number of unique positive matches to outside giving history found for the record. This quantity does not include "maybe" donations.

Fnd Board: Identifies whether the prospect is on the board of a foundation. M = maybe, Y = yes, and a blank = no data match found.

Fnd Corpus: Year-end revenue reported by a foundation.

GS Board: Indicates whether the prospect is on the board of a grant-seeking foundation.

IRS 990PF: Identifies whether the prospect is associated with a namesake grant-giving foundation. M = maybe, Y = yes, and blank = no data match found.

IRS Pub 7806: Identifies whether the prospect is associated with a foundation. M = maybe, Y = yes, and blank = no data match found.

Note that the "Y-M" checkboxes allow you to filter by Yes and Maybe. The "Min-Max" blanks allow you to find foundations whose assets are within a specific range.

Totals Report: Philanthropy (2)

Political Count	Political Total	Maybe-Total	Largest Gift Found	Largest Gift Found Lower Range
Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:
0	$0	$2,042,991	$0	$0
0	$0	$5,054	$0	$0
2	$75	$16,537	$499,999	$100,000
2	$50	$120,587	$25	$25
19	$6,283	$701	$49,999	$25,000
0	$0	$2	$0	$0
1	$50	$2,580,125	$50	$50
10	$2,475	$155,081	$300	$300
1	$100	$168,674	$100	$100
24	$5,525	$8,081	$1,000	$1,000
7	$3,700	$1,000,000	$9,999	$5,000
1	$500	$225,783	$999	$500
6	$510	$50,913	$125	$125
0	$0	$4,204	$0	$0
49	$23,017	$60,001	$1,000,000	$1,000,000
6	$6,050	$22,350	$2,000	$2,000
8	$295	$751	$2,499	$1,000
22	$4,000	$29,801	$9,999	$5,000
0	$0	$0	$0	$0
10	$510	$0	$249	$100
40	$28,724	$0	$10,000	$10,000
3	$200	$300	$100	$100
14	$350	$82,740	$9,999	$1,000
0	$0	$249,524	$0	$0

Political Count: Number of federal and state political gifts found (note that not all states report political giving).
Political Total: Total amount of political giving found; **Maybe** indicates gifts that may not be tied to that donor. This is a strong philanthropy indicator: 15K in 15 political gifts typically indicates a 5-7 figure charitable gift elsewhere.
Largest Gift Found: This and **Largest Gift Found Lower Range** indicate the largest gifts found when the exact amount and/or a range of giving are reported.

Totals Report: Philanthropy (3)

Higher Education Count	Higher Education Total	Education Total	Education Count	Philanthropy and Grantmaking Count	Philanthropy and Grantmaking Total	Healthcare Count	Healthcare Total
Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:
0	$0	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
1	$100,000	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
10	$35,900	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
0	$0	2	$1	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
14	$7,000	0	$0	0	$0	0	$0
1	$100	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
17	$2,202,000	0	$0	0	$0	0	$0
7	$2,000	7	$2,000	0	$0	0	$0
4	$400	2	$0	0	$0	0	$0
12	$8,300	1	$1,000	0	$0	1	$150
1	$0	0	$0	0	$0	0	$0
5	$500	0	$0	0	$0	0	$0
0	$0	0	$0	0	$0	0	$0
0	$0	0	$0	1	$0	0	$0
12	$1,950	1	$125	1	$125	0	$0
0	$0	0	$0	0	$0	0	$0

Higher Education Count: Number of gifts found to universities, colleges and two-year colleges.

Higher Education Total: Dollar amount of gifts found to universities, colleges and two-year colleges.

Education Count: Number of gifts found to private schools, academies, and other educational institutions that aren't included in the Higher Education Count.

Education Total: Dollar amount of gifts found to private schools, academies, and other educational institutions that aren't included in the Higher Education Count.

Philanthropy and Grantmaking Count: Number of gifts found to philanthropic and grant-making organizations.

Philanthropy and Grantmaking Amount: Dollar amount of gifts found to philanthropic and grant-making organizations.

Healthcare Count: Number of gifts found to universities, colleges and two-year colleges.

Healthcare Total: Dollar amount of gifts found to universities, colleges and two-year colleges.

Note: This information is shown graphically in more detail in each prospect's philanthropic and wealth profile.

Totals Report: Philanthropy (4)

Arts Culture and Humanities Count	Arts Culture and Humanities Total	REP Count	REP Total	DEM Count	DEM Total	Other Political Count	Other Political Total	Society Benefit Count
Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:
0	$0	0	$0	0	$0	0	$0	0
1	$0	0	$0	0	$0	0	$0	0
1	$0	2	$75	0	$0	0	$0	0
0	$0	0	$0	2	$50	0	$0	0
3	$0	2	$600	17	$5,683	0	$0	0
0	$0	0	$0	0	$0	0	$0	0
0	$0	1	$50	0	$0	0	$0	0
1	$0	0	$0	9	$2,175	1	$300	0
0	$0	0	$0	1	$100	0	$0	0
1	$0	3	$425	18	$4,150	3	$950	0
0	$0	3	$1,450	3	$1,250	1	$1,000	0
0	$0	0	$0	0	$0	1	$500	0
1	$0	2	$250	4	$260	0	$0	0
1	$0	0	$0	0	$0	0	$0	0
0	$0	29	$11,067	1	$2,600	17	$7,350	0
0	$0	1	$100	4	$4,450	1	$1,500	0
1	$1,000	0	$0	8	$295	0	$0	0
12	$6,700	1	$250	20	$3,700	0	$0	0
0	$0	0	$0	0	$0	0	$0	0
1	$0	0	$0	10	$510	0	$0	0
0	$0	33	$25,825	0	$0	3	$2,200	0
0	$0	1	$100	2	$100	0	$0	0
1	$0	0	$0	14	$350	0	$0	0
0	$0	0	$0	0	$0	0	$0	0

Arts, Culture and Humanities Count: Number of gifts found to organizations whose main mission is related to the arts, culture or humanities.

Arts, Culture and Humanities Total: Dollar amount of gifts found to organizations whose main mission is related to the arts, culture or humanities.

REP Count: Number of gifts found to Republican candidates for federal and state offices. Due to reporting requirements, contributions to PACs and other political organizations are not included. Note that not all states report political contributions.

REP Total: Dollar amount of gifts found to Republican candidates for federal and state offices. Due to reporting requirements, contributions to PACs and other political organizations are not included. Note that not all states report political contributions.

DEM Count: Number of gifts found to Democratic candidates for federal and state offices. Due to reporting requirements, contributions to PACs and other political organizations are not included. Note that not all states report political contributions.

DEM Total: Dollar amount of gifts found to Democratic candidates for federal and state offices. Due to reporting requirements, contributions to PACs and other political organizations are not included. Note that not all states report political contributions.

Other Count: Number of gifts found to candidates for federal and state offices who are not Republicans or Democrats. Due to reporting requirements, contributions to PACs and other political organizations are not included. Note that not all states report political contributions.

Other Total: Dollar amount of gifts found to candidates for federal and state offices who are not Republicans or Democrats. Due to reporting requirements, contributions to PACs and other political organizations are not included. Note that not all states report political contributions.

Society Benefit Count: Number of gifts found to organizations whose main mission is related to a society benefit; these are organizations whose mission doesn't fit other philanthropic categories.

![DONOR SEARCH]

Totals Report: Philanthropy (5) and RFM

Society Benefit Total	Religion Count	Religion Total
Min: Max:	Min: Max:	Min: Max:
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	0	$0
$0	1	$0
$0	0	$0

Society Benefit Amount: Dollar amount of gifts found to organizations whose main mission is related to a society benefit; these are organizations whose mission doesn't fit other philanthropic categories.

Religion Count: Number of gifts found to religious organizations.

Religion Total: Dollar amount of gifts found to religious organizations.

RFM Recent Gift	RFM Freq	RFM Money
Min: Max:	Min: Max:	Min: Max:
73	78	52
1	58	53
31	90	67
97	100	68
70	93	58
87	90	31
17	82	60
33	71	77
87	35	10
21	78	85
11	0	64
87	35	20
68	66	52
21	82	40
62	66	93
99	35	20

This is a detailed breakdown of the three scores which are combined for an overall RFM score (shown on page 8). Each category — Recent gift, Frequent gift and Money (amount given) — is scored from 1-100.

RFM is calculated using your donor data only; it does not compare your donors to other organizations'. The donor who's given you the most amount of money, for example, will be scored 100 in the **RFM Money** category, regardless of how much he/she has given. The top 1% of all your donors, in terms of amount, will receive a score of 100, the next most generous donors will receive an **RFM Money** score of 99, etc.

Although the three RFM scores are weighted equally in calculating an overall RFM score, our analytics show that **RFM Frequency** is the best indicator of future philanthropy. A donor who's given gift annually for 15 years is much more likely to donate again than someone who's given one large gift one time.

Totals Report: Wealth

Capacity Range based on Wealth	Real Estate Est	# Of Prop	Real Estate Trust	# of ST w/Prop	Zestimate Total	Zestimate Count	LN Total	LN Count
	Min: Max:	Min: Max:	Y ☐ M ☐		Min: Max:	Min: Max:	Min: Max:	Min: Max:
K - $5,000 - $9,999	$0	0		0	$0	0	$0	0
I - $15,000 - $24,999	$201,000	1		1	$0	0	$201,000	1
J - $10,000 - $14,999	$132,300	1		1	$0	0	$132,300	1
L - $2,500 - $4,999	$50,600	1		1	$0	0	$50,600	1
J - $10,000 - $14,999	$17,600	1	Y	1	$0	0	$17,600	1
L - $2,500 - $4,999	$0	0		0	$0	0	$0	0
K - $5,000 - $9,999	$90,200	1		1	$0	0	$90,200	1
H - $25,000 - $49,999	$316,052	2	Y	2	$0	0	$316,052	2
I - $15,000 - $24,999	$300,800	7		1	$0	0	$300,800	7
H - $25,000 - $49,999	$292,800	1		1	$0	0	$292,800	1
E - $250,000 - $499,999	$2,304,113	2		1	$0	0	$2,304,113	2
I - $15,000 - $24,999	$283,000	2		1	$0	0	$283,000	2
I - $15,000 - $24,999	$206,900	1		1	$0	0	$206,900	1
K - $5,000 - $9,999	$120,400	1	Y	1	$0	0	$120,400	1
F - $100,000 - $249,999	$871,000	2		2	$0	0	$871,000	2
H - $25,000 - $49,999	$304,880	2		1	$0	0	$304,880	2
K - $5,000 - $9,999	$85,800	1	Y	1	$0	0	$85,800	1
F - $100,000 - $249,999	$1,033,600	3	Y	1	$0	0	$1,033,600	3
I - $15,000 - $24,999	$228,100	2	Y	1	$0	0	$228,100	2
K - $5,000 - $9,999	$109,800	1		1	$0	0	$109,800	1
F - $100,000 - $249,999	$240,100	2		1	$0	0	$240,100	2
J - $10,000 - $14,999	$180,800	1		1	$0	0	$180,800	1
J - $10,000 - $14,999	$144,800	2		1	$0	0	$144,800	2
J - $10,000 - $14,999	$186,200	3	Y	2	$0	0	$186,200	3

Capacity Range Based on Wealth: The amount a donor can give as a "stretch" gift over a five-year period, based on his/her wealth. The individual philanthropy and wealth report on each prospect includes two capacity ranges: one based on wealth and one based on previous philanthropy.

Real Estate Est: Estimated value of all real estate owned by the donor from the DonorSearch Real Estate Database.

# of Prop: Number of properties owned by the donor from the DonorSearch Real Estate Database.

Real Estate Trust: Y = yes, M = maybe, Blank = no information found.

# of ST w/Prop: Number of states where donor owns property from the DonorSearch real Estate Database.

Zestimate Total: Value of real estate according to Zillow (only shown on profiles run prior to mid-2015, otherwise the value will be $0).

Zestimate Count: Number of properties owned according to Zillow (only shown on profiles run prior to mid-2015, otherwise the value will be $0).

LN Total: Value of real estate according to LexisNexis.

LN Count: Number of properties owned according to LexisNexis.

Totals Report: Wealth (2)

SEC Stock Value	SEC Stock or Insider	Market Guide	Market Guide Comp	Market Guide Options	Business Revenues	Business Affiliation	Pension Admin
Min: Max:	Y ☐ M ☐	Y ☐ M ☐	Min: Max:	Min: Max:	Min: Max:	Y ☐ M ☐	Y ☐ M ☐
$0			$0	$0	$34,000	Y	
$0			$0	$0	$4,527,853	Y	
$0			$0	$0	$130,000	Y	
$0			$0	$0	$33,300,000	M	
$0			$0	$0	$0		
$0			$0	$0	$0		
$0			$0	$0	$956,628,000	M	
$0			$0	$0	$180,000	M	
$0			$0	$0	$3,400,000	Y	M
$0			$0	$0	$0		
$0			$0	$0	$3,661,305	Y	
$0			$0	$0	$1,597,229,000	M	
$0			$0	$0	$6,158,200,000	Y	
$0			$0	$0	$0	M	
$0			$0	$0	$0		
$0			$0	$0	$990,000	Y	M
$0			$0	$0	$2,300,000	M	
$0			$0	$0	$120,000	M	
$0			$0	$0	$96,000	M	
$0			$0	$0	$0		
$0			$0	$0	$650,000	Y	Y
$0			$0	$0	$0		
$0			$0	$0	$450,000	M	M
$0			$0	$0	$2,200,000	M	

SEC Stock Value: Dollar value of any SEC reported stock options.

SEC Stock or Insider: Identifies whether the prospect has stock options related to being a company insider or high-ranking employee who must report stock transactions to the SEC. Y=Yes, M=Maybe, blank = no data match found.

Market Guide: Identifies whether the prospect has been matched to the Reuters Market Guide database on company insiders. M=Maybe, Y=Yes, and blank = no data match found.

Market Guide Comp: Dollar value of any Market Guide reported company compensation for a given year.

Market Guide Options: Dollar value of any Market Guide reported stock options executed.

Business Revenues: Dollar value of revenues at a Dun & Bradstreet firm at which the prospect is an executive-level employee. Revenues over $1 million are highlighted in light green, and revenues over $5M are highlighted in dark green. These revenues are reported by the company or estimated by Dun & Bradstreet, and thus may be distorted.

Business Affiliation: Identifies whether the prospect has been matched to a Dun & Bradstreet firm at an executive level position. Y=Yes, M=Maybe, blank = no data match found.

Pension Admin: Identifies whether the prospect has been matched to the Larkspur SEP/Keogh Pensions database as having deferred income or a qualified pension plan. Y=Yes, M=Maybe, blank = no data match found.

Pension Assets (not shown)**:** Dollar value of Larkspur/ Keogh pension plan or deferred income; not all assets may belong to the prospect..

Avg Home Value	Median Household Inc	Corp Tech	FAA Pilots	Airplane Owner	Coast Guard Boat	Whos Who
Min: Max:	Min: Max:	Y☐ M☐	Y☐ M☐	Y☐ M☐	Y☐ M☐	Y☐ M☐
$151,025	$54,786					
$134,334	$39,462					
$134,334	$39,462					
$60,429	$23,383					Y
$111,570	$44,930					
$134,334	$39,462					
$134,334	$39,462					M
$796,025	$89,572					Y
$75,950	$34,551					
$232,235	$60,795					
$140,153	$43,292					
$151,025	$54,786					M
$180,248	$46,558					
$0	$0					
$134,334	$39,462					
$134,334	$39,462					
$151,025	$54,786					
$106,994	$31,769					Y
$134,334	$39,462					
$151,025	$54,786					M
$134,334	$39,462					
$134,334	$39,462					
$106,994	$31,769					
$151,025	$54,786					

Avg Home Value: Average property value for the zip code in which the prospect resides.

Median Household Inc: Median household income for the zip code in which the prospect resides.

Corp Tech: Indicates if the prospect is profiled in the CorpTech database, a database of business executives in high technology manufacturing, development and service companies. Y = Yes, M=Maybe, Blank = No.

FAA Pilots: Identifies if the prospect has a pilot's license and is in the FAA database. Y = Yes, M=Maybe, Blank = No.

Airplane Owner: Identifies if the prospect is an airplane owner. Note that corporate aircraft will not be listed, nor will fractional or timeshare ownership. Y = Yes, M=Maybe, Blank = No.

Coast Guard Boat: Identifies if the prospect is a boat owner and is in the Coast Guard database. Y = Yes, M=Maybe, Blank = No.

Who's Who: Identifies if the prospect is in the Marquis' Who's Who, which offers biographical and professional information to help you create a more complete profile on your prospect. Who's Who information is contained in the complete philanthropic and wealth profile of each donor. Y = Yes, M=Maybe, Blank = No.

Totals Report: Models and Analytics

Estimated Capacity	Annual Fund Likelihood	Major Gift Likelihood	PGID	Vip Match
Min: Max:	Min: Max:	Min: Max:	Min: Max:	Y ☐ N ☐
$5,479	212	70	4	
$15,221	281	146	7	
$10,094	281	185	4	
$3,882	300	161	2	
$13,899	281	300	2	
$3,946	181	49	2	
$6,881	206	78	4	
$28,884	300	117	6	
$22,879	223	133	7	
$33,223	224	168	4	
$412,297	196	187	7	
$21,931	287	38	7	
$16,178	206	70	4	
$9,118	263	50	4	
$169,850	300	300	5	
$35,188	300	143	7	
$6,792	112	19	7	
$127,616	300	300	2	
$17,274	236	71	4	
$8,825	262	65	3	
$104,354	281	300	3	
$13,892	106	27	7	
$11,315	281	79	2	
$14,101	212	38	7	

Estimated Capacity: Estimated 5-year gift capacity for the prospect based on wealth and external philanthropy.

Annual Fund Likelihood: Prospect's likelihood to be an annual fund donor based upon a combination of external giving and giving history to the client's organization (if available). 300 = most likely; 0 = least likely.

Major Gift Likelihood: Prospect's likelihood to be an major gift donor based upon a combination of external giving and giving history to the client's organization (if available). 300 = most likely; 0 = least likely.

Planned Gift Likelihood: Prospect's likelihood to be a planned gift donor based on internal giving history.
) = no info found; 7 = least likely; 1= most likely. Donors ewith no internal giving history will be listed as 7.

VIP Match: Used only for Daily Patient Screening; identifies most potentially philanthropic patients.

Totals Report: DS Ratings

DS Rank	The gold color is the distinctive mark of the DS Rating System in your screening results. All ratings highlighted in gold are our top three ratings, and suggest the prospect is capable of making major gifts.
DS 1-1	Exact match as a donor giving $5,000 or more to a nonprofit or political organization found in our giving history archive. A DS1-1 rated prospect may have markers of wealth or may only be matched to a significant giving history, and have no notable wealth markers.
DS 1-2	Exact match to exceptional markers of wealth: Political giving of $10,000, DonorSearch or LexisNexis real estate holdings of $2 million+, D&B business executive at firms with revenues of $5 million+, Foundation Trustees, SEC Insiders, Market Guide Executives, Nonprofit board members, Guidestar grant seeking organization board member, IRS 990-PF trustee or officer.
DS 1-3	Exact match to lower, but notable markers of wealth, including real estate holdings of $1-2 million, business executive at a firm with revenues of $1-5 million, or political giving in excess of $5,000.
DS 1-4	Exact matches to significant markers of wealth, including real estate holdings of $500,000 - $1 million, ownership of at least two properties or a real estate trust, a gift of over $500, or executive in a high tech firm.
DS 1-5	Exact/very likely matches to markers of wealth or philanthropy, including business executive at a firm with revenues of $1 million, or the strong possibility of being an SEC insider or member of a foundation board.
DS 2	Exact match to selected markers of wealth, including airplane or boat ownership, holder of a pilot's license, or account holder of a publicly reported pension.
DS 3	No noteworthy matches to giving history or wealth indicators.

ProspectView Screening Profile

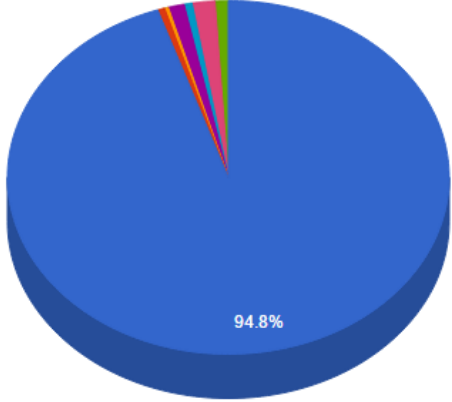## ProspectView Screening Profiles (PSP) [?]

Kevin A [redacted]
Desiree [redacted]
930 [redacted] Valley Rd

Lutherville Timonium MD 21093

Target Ask Based on Giving [?]	$1,000,000 - $1,000,001
Target Ask Based on Wealth [?]	$1,000,000 - $4,999,999

DS Rating: [?]	DS1-1	
Quality Score: [?]	16.8	
Assessed:	Not Assessed	Edit
Assessment Questions:	None	Edit
Notes:	None	Edit

	[?] High Quality	All Possible
Real Estate: [?]	$12,382,970	$12,382,970
Number Of Properties: [?]	3	3
SEC Stock: [?]	$15,369,543	$15,369,543
SEC Options: [?]	$0	$0
SEC Compensation: [?]	$0	$0
Total Charitable Giving: [?]	$2,068,353	$2,095,974
Number Of Charitable Gifts: [?]	15	35
FEC Gift Total Amount: [?]	$67,850	$68,325
Number Of FEC Gifts: [?]	29	31

Pie chart legend:
- Higher Education
- Education
- Youth Development
- Human Services
- OtherPolitical
- REP
- DEM
- Other

94.8%

[?] Close All Sections   Open All Sections

Client Supplied Fields   **Results Found**   +

The ProspectView Screening Profile provides detailed information on any donor or prospect, and expands the information shown in the Totals Table.

To see exact percentages of each category on the pie chart, hover your mouse pointer over that wedge.

When blue question marks are adjacent to any data, click on the question mark for an explanation of that data.

The High Quality category indicates data with a confidence level of 17 or higher. (Confidence levels can be edited; explained on page 22.)

ProspectView Screening Profile (2)

Category	Results		
Charitable Giving	15/35 Results Found ✔		Actio
Political Giving	11/13 Results Found ✔		+
Political State Giving	18/18 Results Found ✔		+
IRS PUB7806	0 Results Found ✘		+
IRS 990PF	0 Results Found ✘		+
Lexis Nexis Real Estate	4 Results Found ✔		+
Zillow Real Estate	0 Results Found ✘		+
DnB Business Executives	6 Results Found ✔		+
GuideStar Grant Giving Nonprofit	1 Results Found ✔		+
GuideStar Grant Seeking Nonprofit	11 Results Found ✔		+
SEC Insider Holdings	1 Results Found ✔		+
Market Guide Business Executives	1 Results Found ✔		+
Marquis Who's Who	1 Results Found ✔		+
CorpTech	0 Results Found ✘		+
Larkspur Pension Plan	0 Results Found ✘		+
Pilots	0 Results Found ✘		+
Airplanes	0 Results Found ✘		+
USCoastGuard	0 Results Found ✘		+
Who Knows Who	3059 Results Found ✔		+

In any category. Click on the category name, number of results or plus sign to see all of the data in that category (illustrated on page 23). When a fraction, such as the 15/35 Results Found in Charitable Giving, above, the two numbers indicate High Likelihood/Potential Likelihood of the results being associated with that donor.

Because data is frequently updated, profiles can change often. To ensure you're looking at the most current data, use the Refresh Data command on the Action pulldown menu in the upper right.

Some data can be edited by the user, as illustrated on page 23.

The one category in the ProspectView Screening profile that does not appear in the Total Table is Who Knows Who. Who Knows Who lists people who've served on organization or corporate boards with the prospect. By knowing who knows a prospect or donor, an organization can often find a current board member, executive or supporter who can introduce development staff to a prospect.

ProspectView Screening Profile (3)

Charitable Giving   **38/41 Results Found ✓**   Acti

Recipient Organization City, State Zip	Type	Donor Name Category	Year/Source Occupation	High Donor City, State Zip	Low	Quality Score
						Check All / Uncheck All
Bates College		Darrell W. and Nancy C. ...	2003 DonorSeries	$499,999	$100,000	20.0
Lewiston ME 04240	Capital / Campaign	Higher Education				☐
President And Trustees Of Bates College		Darrell C. ... 89 and Nancy Cr...	2002 Annual Reports	$499,999	$100,000	20.0
LEWISTON ME 04240	Annual	Higher Education				☐
Robert F Kennedy Childrens Action Corps		Darrell C. ...	2013 Annual Reports	$100,001	$100,000	19.8
BOSTON MA 02108	Annual	Human Services				☐
Museum of Fine Arts Boston		Nancy and Darrell C. ...	2008 Annual Reports	$249,999	$100,000	19.6
Boston MA 02115	Annual	Arts culture and Humanities				☐
Bates College		R Darrell W C ...	1999 Annual Reports	$43,869	$43,869	18.1
Lewiston ME 04240	Annual	Higher Education				☐
Robert F Kennedy Childrens Action Corps		Darrell C. ... John D and Catherine T Ma... ... Foundation	2013 Annual Reports	$25,001	$25,000	19.4
BOSTON MA 02108	Annual	Human Services				☐
Bates College		Darrell W. and Nancy B. C...	2003 DonorSeries	$24,999	$10,000	20.0
Lewiston ME 04240	Annual	Higher Education				☐
President And Trustees Of Bates College		Darrell W Cr ... 89 and Nancy Cr...	2002 Annual Reports	$24,999	$10,000	19.4
LEWISTON ME 04240	Annual	Higher Education				☐
President And Trustees Of Bates College		Darrell W C. ...	2002 Annual Reports	$10,001	$10,000	18.1
LEWISTON ME 04240	Annual	Higher Education				☐
THE INTERNATIONAL FRIENDS OF THE MONTREAL MUSEUM OF FINE ARTS INC		Nancy and Darrell C. ...	2005 DonorSeries	$9,999	$5,000	19.6
Boston MA 02115	Annual	Arts culture and Humanities				☐
Bucknell University		Darrell and Nancy Sa ... 88 Cra...	1998 Annual Reports	$4,999	$2,500	20.0
Lewisburg PA 17837	Annual	Higher Education				☐
Mystic Seaport Museum Inc		Mr Darrell C. ...	2014 Annual Reports	$4,999	$2,500	17.5
MYSTIC CT 06355	Annual	Arts culture and Humanities				☐
Bates College		Susan Luther De... / 88 Leonard J W... / 88 Catherine Burke Ro... 89 Darrell W Cra... 89	1996 Annual Reports	$4,999	$1,000	20.0
Lewiston ME 04240	Annual	Higher Education				☐
THE INTERNATIONAL FRIENDS OF THE MONTREAL MUSEUM OF FINE ARTS INC		Nancy and Darrell Cra...	2003 DonorSeries	$4,999	$1,000	19.6
Boston MA 02115	Annual	Arts culture and Humanities				☐

Click on any category header to see details. Data with a high confidence level is shown on a white background; data with a lower confidence level is shown on a gray background.

To change the confidence level of any giving data, click on the box below the confidence number. Use the pulldown Action menu on the upper right to select a new confidence level. If your changes affect the giving capacity based on philanthropy, selecting Refresh Data from the Action pull-down menu will change the estimated giving amount.

The Charitable Giving section of the ProspectView Screening Profile includes two types of clickable links.

When available, a link on the name of the source document will lead to a pdf of that document, so you can see a donation in context.

When the donor's name is a link, that link will take you to a Google search of that name.

Executive Analysis

Executive Analysis

Batch Name: Nonprofit University
Records Reviewed: 185

Client Reported Most Recent Giving: 2015
Client Reported Earliest Giving: 1970
Covering a Gift Span of: 45
Client Reported Total Giving: $5,988

Total Likely Charitable Giving Found: $9,059,886
Total Likely Political Giving Found: $3,347,387

Opportunity: 1 to 2,072

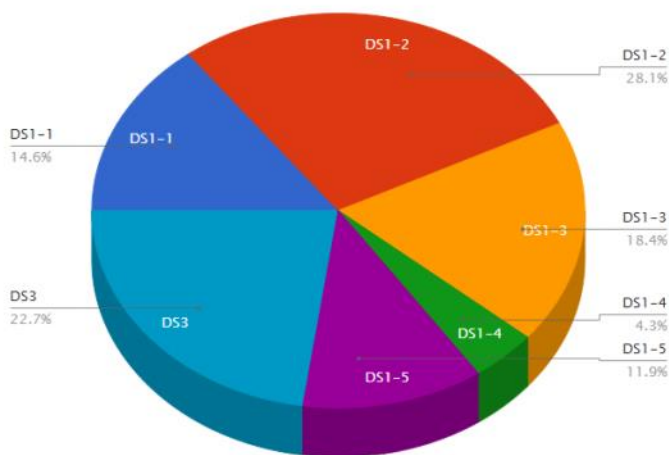**Select a chart**

DS Ratings Breakdown ▼

Display as: Graph | Table

Toggle Subtitles

DS Ratings Breakdown

This chart visualizes the breakdown of your file based on our DS Rating system. DS1-1 through DS 1-3 are considered major gift prospects based on external markers. The average file has 15% to 20% major gift prospects. Your file has approximately **61%** major gift opportunity.

Executive Analysis is a new tool from DonorSearch that provides critical information about your entire donor file by analyzing your data in three ways: by loyalty, by philanthropy, and by wealth. With Executive Analysis, you can see at a glance:

The giving potential of your current donor list
How much of that giving you're capturing
The organizations and causes your donors support (besides yours)
The politicians and political causes your donors support
The likelihood of your donors giving major gifts
Other critical information depending upon your development strategy

To access Executive Analysis, select it from the My Portfolio tab after logging into your account at DonorSearch.net.

From the first page of Executive Analysis, you can view a DS Ratings Breakdown of your entire file. Click on any wedge of the pie chart to display a list of the top 50 donors in that category, complete with links to their profiles.
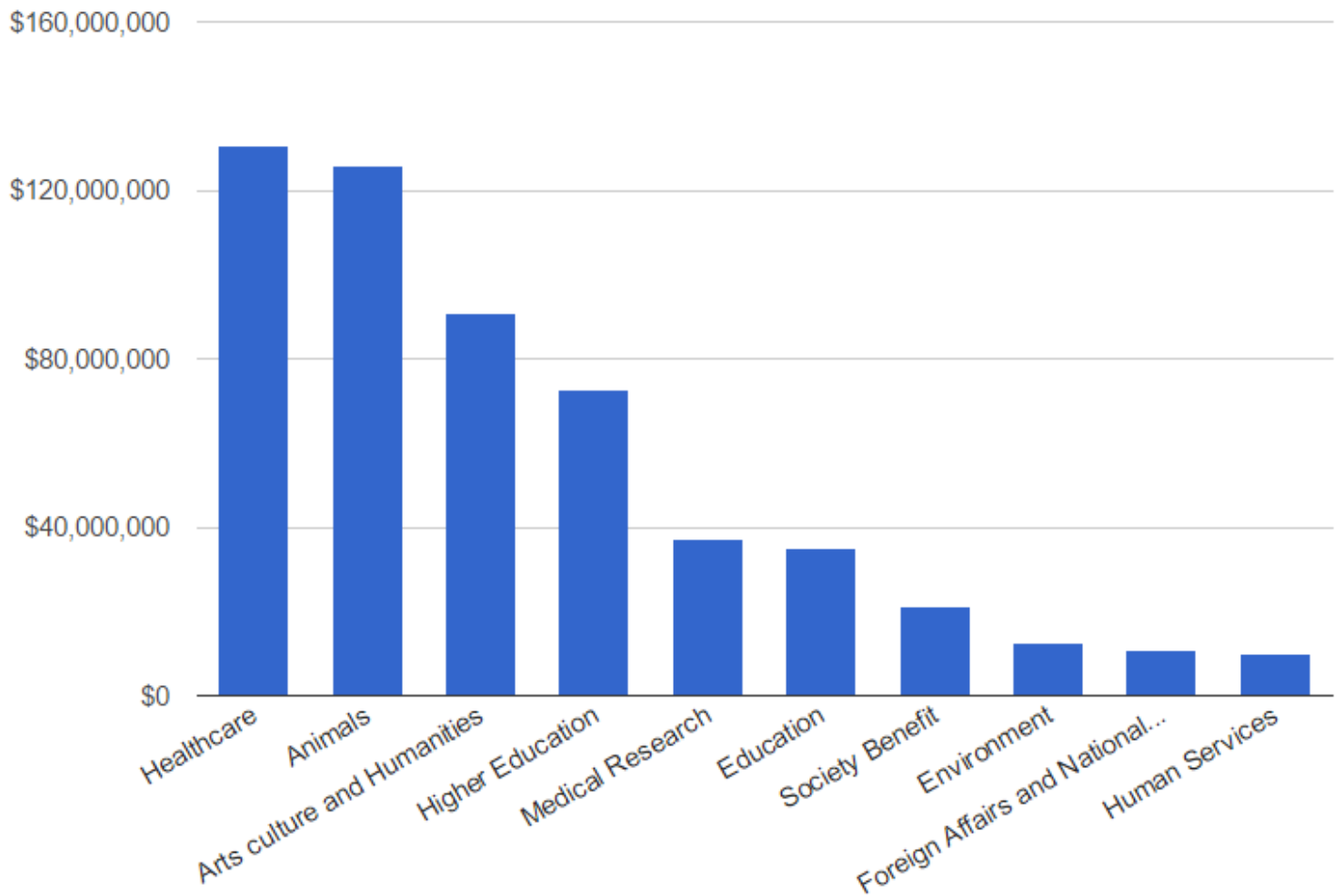
Executive Analysis (2)

DS1-1 Affinity
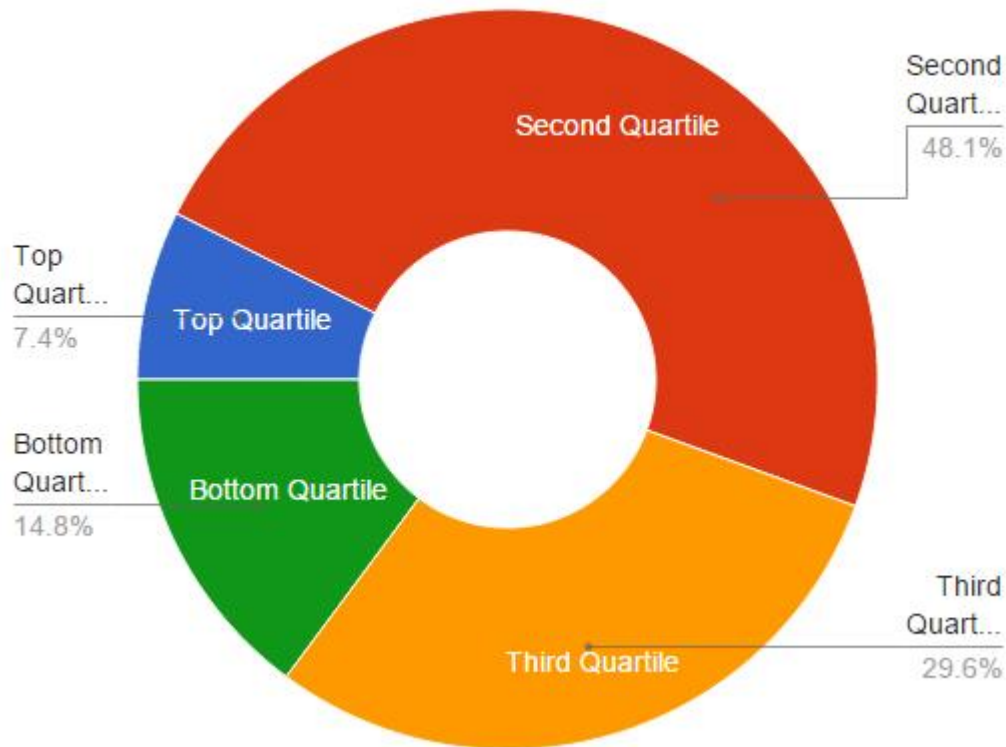
One key piece of information that Executive Analysis provides is the philanthropic potential of your most loyal donors.

By looking at the size of gifts they've made to other organizations, and comparing those gifts to their giving and loyalty to you, you can realize the opportunity available to your development program.

For example, this graph looks at the donors with the most philanthropic capacity who are ranked DS 1-1 in Donor-Search's philanthropy and wealth ranking system. Executive Analysis evaluates that group for loyalty to the organization based on the frequency and amount of giving.
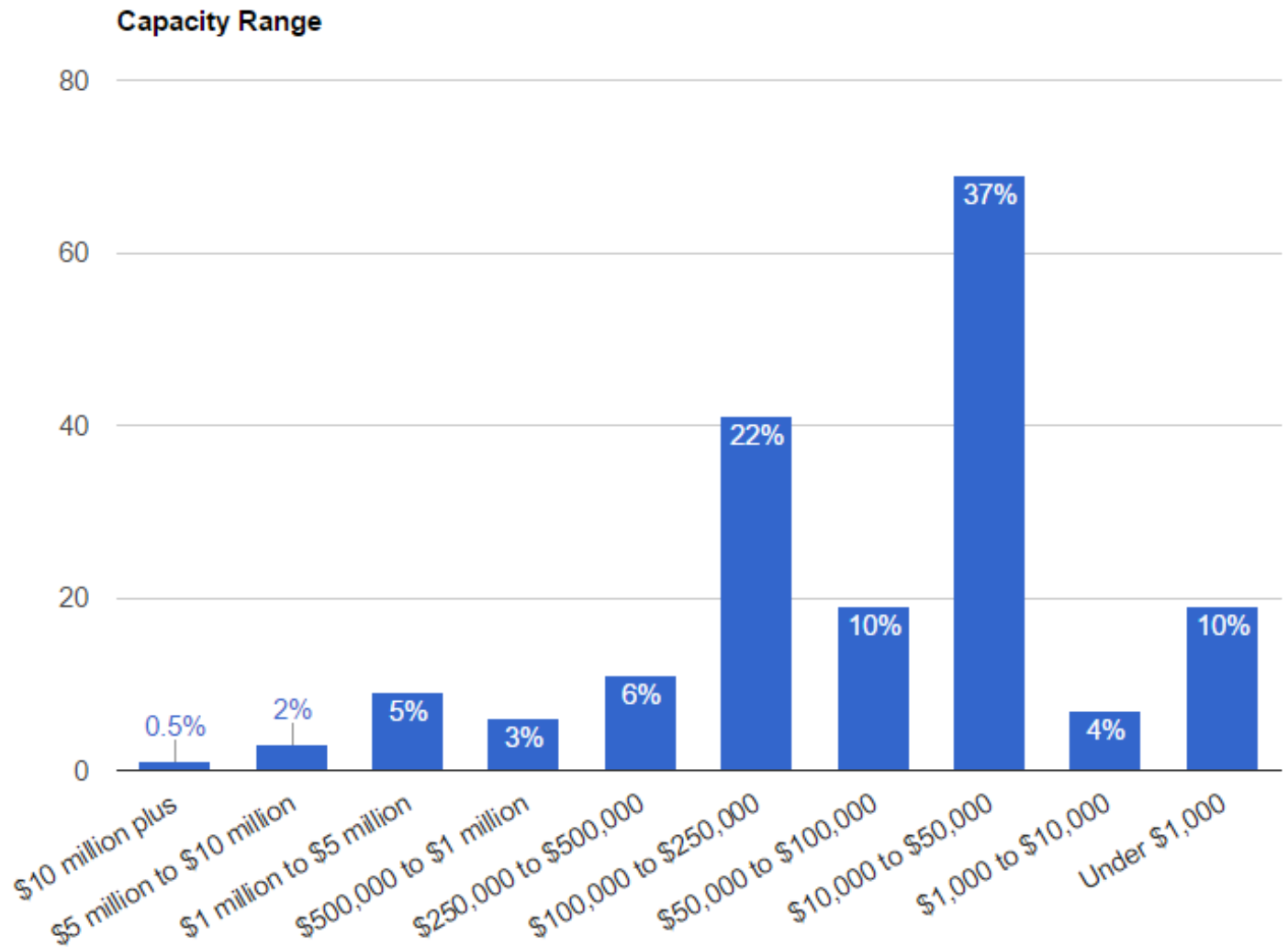
Executive Analysis (3)

Giving by Interest: Total Dollars

Executive Analysis pinpoints the causes your donors support, both in dollar amounts (shown here) and number of gifts. Not only does this help you measure loyalty to a cause, but also helps you identify the types of potential strategic partners your organization might want to approach.

Many organizations find this helpful in planning joint events or campaigns with other organizations.

Executive Analysis (4)

Capacity Range

One critical measure Executive Analysis provides is your donors' giving capacity measured as a "stretch" gift (10% of net worth, or 2% of their net worth per year with a five-year pledge). This pinpoints how many of your current donors have the capacity to give a six or seven-figure gift. It also tells you how well your development efforts are capturing gifts of that size from your current supporters.

Executive Analysis (5)

Major Gift Likelihood Index
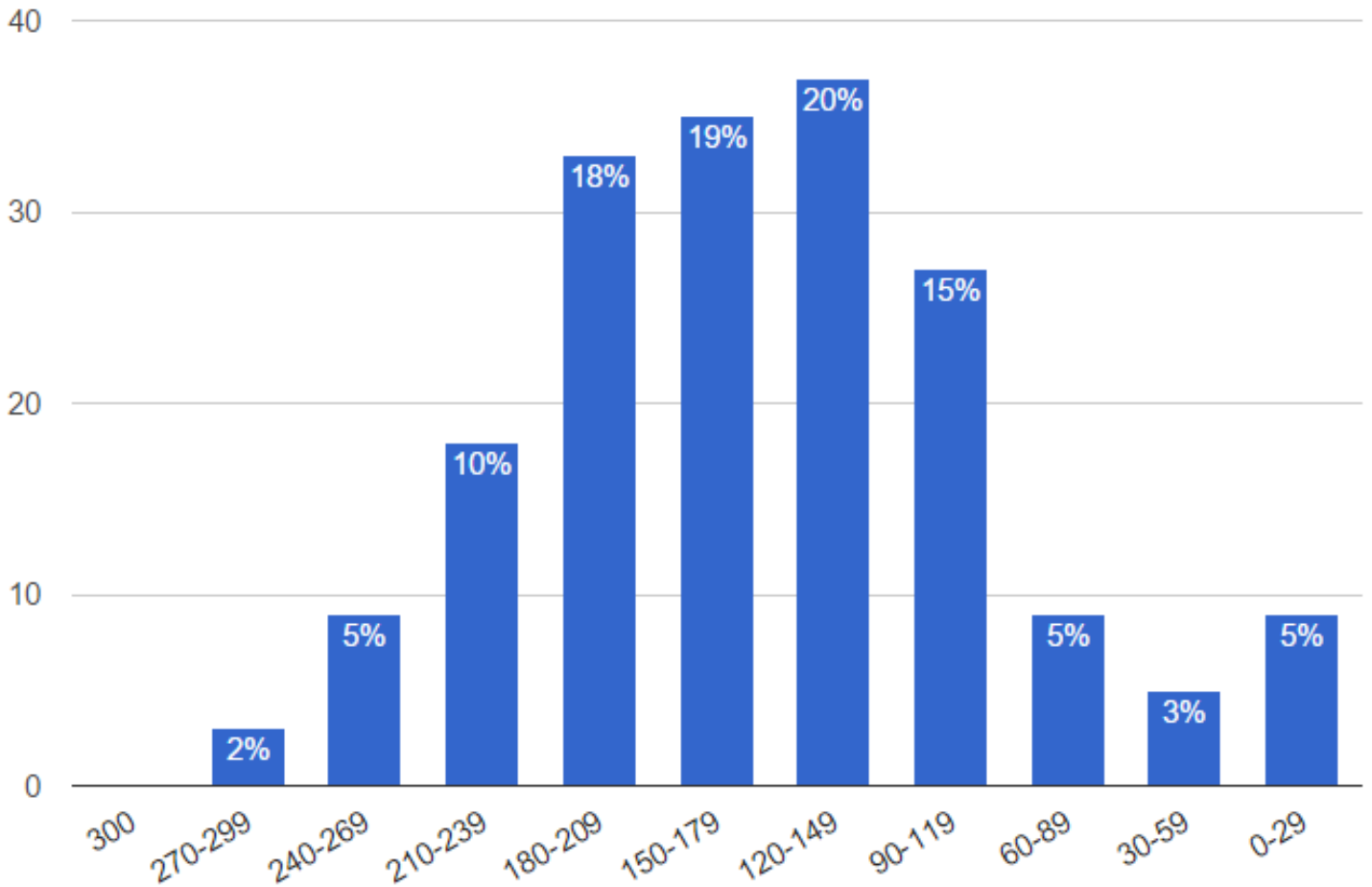
The Major Gift Likelihood Index uses sophisticated modeling that analyzes previous giving to your organization, along with a variety of wealth markers. This blending of internal and external data not only indicates how well you're capitalizing on your donors' generosity, but also how many are likely to be responsive to major gift asks.

For any organization with internal giving data, this index is an invaluable tool for development and forecasting.

Executive Analysis (6)

Giving to Other Organizations: Largest Charitable Gifts
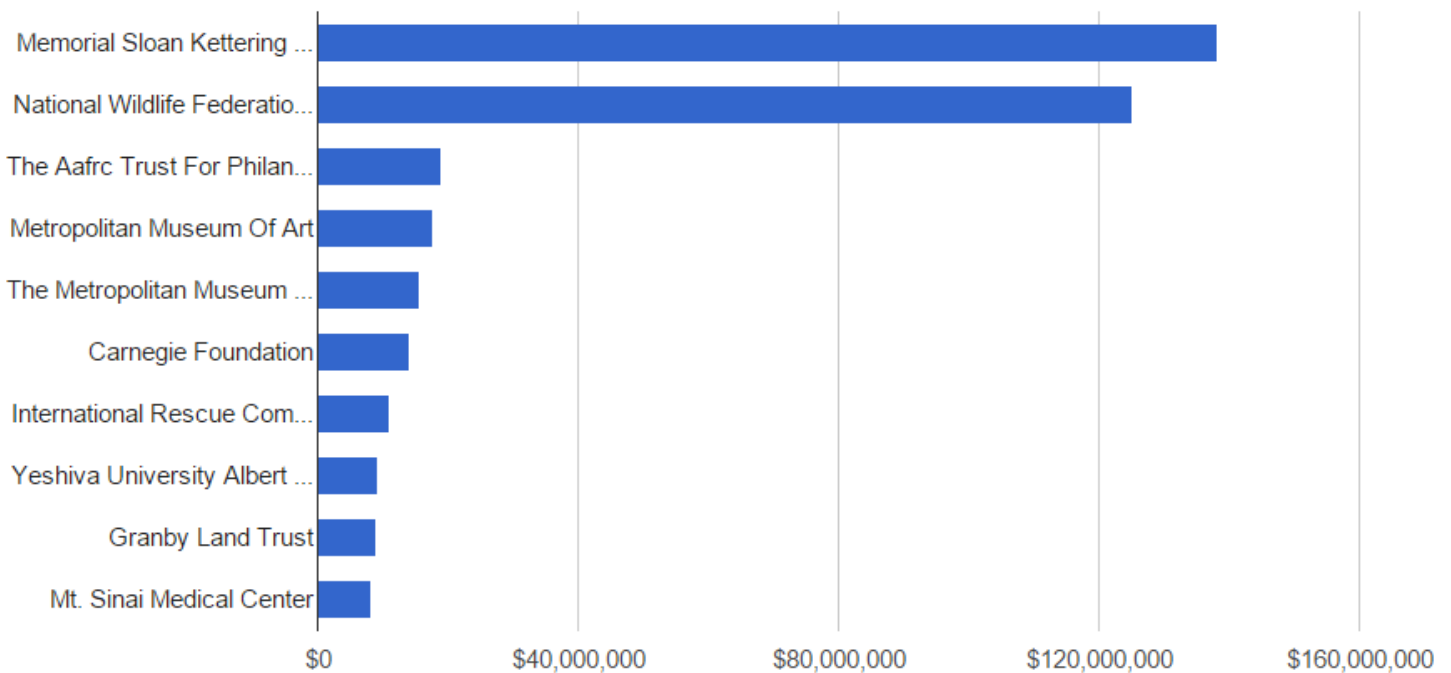
Knowing the other organizations your donors support can help shape your development strategy in several ways.

First, understanding who's competing for your donors' support can help you tailor your message and approach to more closely align with your donors' current interests and giving.

Second, it can help you identify potential strategic partners for dual fundraising activities, events, and other development efforts.

Third, it pinpoints the organizations that are doing a particularly good job in attracting your donors' support, giving you a potential development template to follow.

Finally, it illuminates not only the causes, but the specific organizations, whose messages resonate with your donors, again helping you tailor your message to boost your development.

Executive Analysis (7)

Giving to Other Organizations: Highest Number of Political Gifts
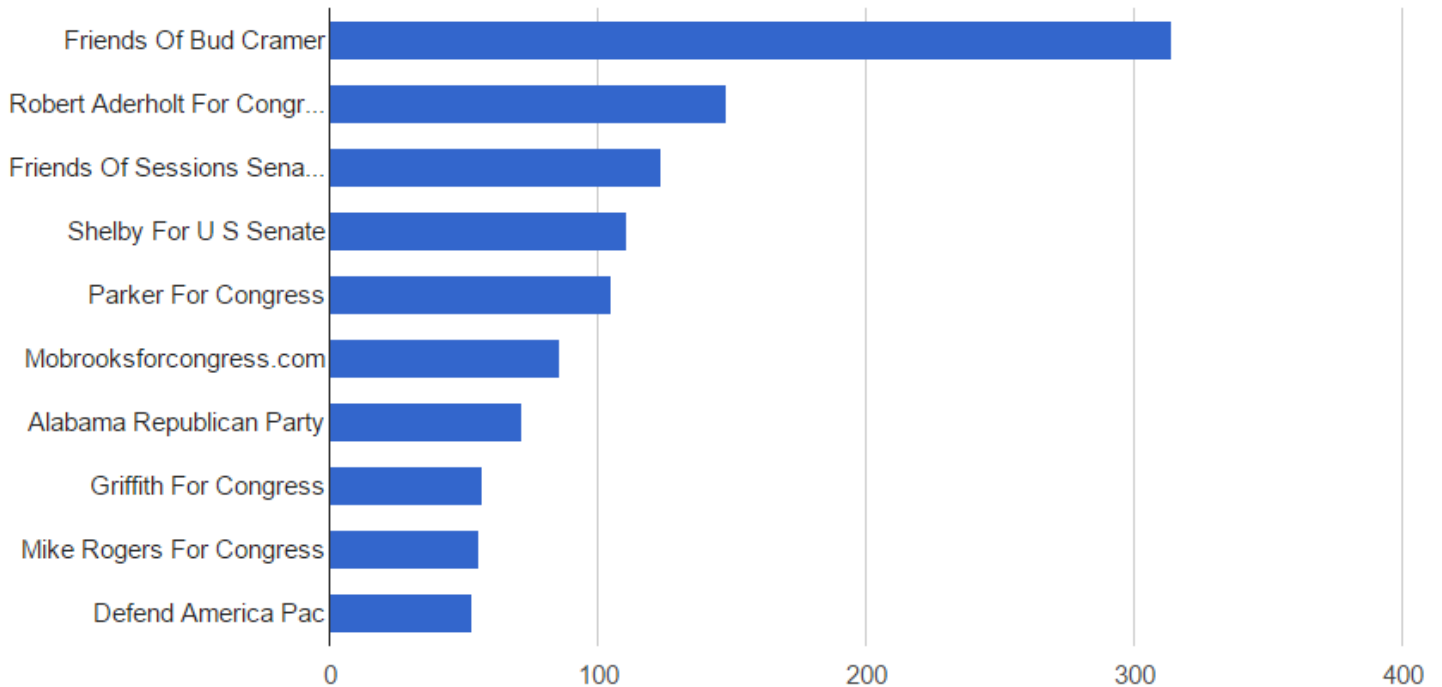
Understanding the political giving of your donors provides three critical pieces of information.

First, political giving correlates very closely with charitable giving. If your donors are strong supporters of political causes, they'll also be strong supporters of charitable giving.

Second, knowing the candidates and political causes your donors support can help you better understand how to build stronger relationships.

Finally, if your donors are strong supporters of certain candidates, organizing events featuring those candidates can help attract more support from your donors.

Executive Analysis (8)

$1 million to $5 million			
Name	DS Rating	Capacity	
Patricia Schaefer, IN	DS1-5	$4,276,490	
Dina Dublon, NY	DS1-1	$4,051,869	
James M Denny, IL	DS1-1	$4,036,186	
Philip H Knight, OR	DS1-1	$3,494,390	
Kenneth Stinson, ne	DS1-1	$3,274,105	
Bertrand P Serlet, CA	DS1-2	$3,182,276	
Bennett M Dorrance, AZ	DS1-1	$2,451,217	
Steven Davis, OH	DS1-2	$2,400,309	
Richard C Smith, NY	DS1-1	$2,203,855	
Philip L Francis, AZ	DS1-1	$1,994,081	
Eduardo G. Mestre, NY	DS1-1	$1,739,143	
William J. Poorvu, MA	DS1-1	$1,658,109	
Mark R Fetting, MD	DS1-1	$1,607,112	
Patricia Ann Wellde, NY	DS1-1	$1,593,234	

With Executive Summary, you can go one step beyond the summary information to find your top prospective donors

On any screen, click on the bar of a bar graph or a section of a pie chart. You'll see an instant pop-up of the top 50 donors in that category. For example, click on the $1-5 million bar of the giving capacity graph and you'll see a pop-up with the top 50 donors who have $1-5 million in giving capacity. That pop-up includes links to full research reports for each prospect, making it simple to identify the best prospective donors in any category.

DonorSearch Products and Services

ProspectView Screening: Comprehensive philanthropic and wealth data and analysis, with in-depth reports on every donor

ProspectView Plus: Unlimited one-to-one online lookups of prospect, foundation and corporate philanthropic and wealth data. Can be included with ProspectView Screening or as a stand-alone product

Integrated Search: A subset of ProspectView Plus, offering the most popular functionality of ProspectView Plus at a value price for price-sensitive organizations

Live Audience Analytics: A new, innovative realtime constituent intelligence solution for public broadcasting that identifies the true potential of your audience by recommending a cultivation strategy for each of your supporters, members, and listeners/viewers.

Daily Patient Screening: A specialized tool for healthcare providers, providing quick turnaround of key philanthropic and wealth data, to help foster relationships with current and grateful patients.

Planned Giving Prospect Identification (PGID): A research tool that finds top planned giving prospects.

BoardLink: A new tool that helps you leverage the relationships you already have with board members, donors and other supporters to nurture relationships with new donors.

Data Cleansing and Appends: National Change of Address (NCOA), as well as phone, cell phone and email appends.

Mailing Lists: screened and unscreened.

Data Cleansing and Appends: corrections of bad data and other issues, as well as appends of phone numbers, cell numbers, email addresses, NCOA screening, age/date of birth and other valuable information.

Client Support
clientsupport@donorsearch.net • 410-670-7880

Client Support is available 9 am to 5 pm ET weekdays. Messages and emails left after hours will be returned the following business day.

Sales
info@donorsearch.net • 410-670-7880