

Identifying Potential Donors

Michel Hudson, CFRE
501(c)onsulting

Fund Raising Management Course
March 1, 2004

Research Is Right

- ▶ The *right solicitor*
- ▶ Asks the *right people*
- ▶ For the *right amount*
- ▶ And the *right project*
- ▶ At the *right time*.

Agenda

- ▶ The Basics
- ▶ Individuals
- ▶ Corporations
- ▶ Foundations
- ▶ Additional Resources
- ▶ Q&A

The Basics

- ▶ Not just Facts and Assets
- ▶ Support System
- ▶ Focus on Major Donors
- ▶ Types of Prospects
- ▶ Sources of Information

Individuals

- ▶ Constituency
- ▶ Who Knows Whom
- ▶ Make the Connection
- ▶ Not all Public Information
- ▶ ***Net Worth is a Myth***

What to Look For

- ▶ Contact Information
- ▶ Biographical Data
- ▶ Personal Relationships
- ▶ Career History
- ▶ Affiliations
- ▶ Links to Your Organization
- ▶ Wealth Indicators

Corporations

- ▶ “Quid Pro Quo”
- ▶ Private vs. Public
- ▶ Foundation vs. Direct Giving vs. Marketing

What to Look For

- ▶ Contact Information
- ▶ Products
- ▶ Financial Information
- ▶ Philanthropic History
- ▶ Links

Foundations

- ▶ Exist to Give Away Money
- ▶ Match Interests of Foundation
- ▶ Match Amounts

Types of Foundations

- ▶ Independent or Private
- ▶ Family
- ▶ Operating
- ▶ Corporate
- ▶ Community
- ▶ Public Charity

What to Look For

- ▶ Contact Information
- ▶ Purpose & Restrictions
- ▶ Assets
- ▶ Philanthropic History
- ▶ Procedures & Deadlines
- ▶ Links

Where to get more information

- ▶ Other training sessions
- ▶ Books, articles, electronic sources
- ▶ Consulting services, other sources

Where to get more information – Online

- ▶ **University of Southern California – NETSource@USC** <http://www.usc.edu/dept/source/>
- ▶ **Princeton University – Development Research** <http://www.princeton.edu/giving/devres/netlinks.html>
- ▶ **Portico – Web Resources for Advancement Professionals** <http://indorgs.virginia.edu/portico>

Where to get more information – Online

- ▶ **APRA – Assoc. of Professional Researchers for Advancement** <http://www.APRHome.org>
- ▶ **CASE – Council for Advancement and Support of Education** <http://www.case.org>
- ▶ **BWF Bibliography** – (must register for access)
<http://www.bwf.com/docs/bwf/Bib20031.PDF>
- ▶ **Travis County Appraisal District** –
<http://www.traviscad.org/>

Q&A

Michel Hudson, CFRE
501(c)onsulting
1805 Gnu Gap
Round Rock, TX 78664
512-565-0142
mhudson@501consulting.com