



PROSPECT PROFILES

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Before a nonprofit organization can engage in solicitation, it needs both insights and solid information about the prospective donor. Typically this information is gathered overtime through conversations and other research including what can be learned on the internet or through the media. This takes place as the organization educates the prospect about its work. This cultivation stage is where relationships are forged, and it is a vital part of the development cycle. Gathering information is done in a variety of ways,; research, word of mouth, and conversations. For instance, board members can be asked to complete a profile form that will jump start your information bank.

Whatever information is collected, it should be handled with care and transferred to your donor database - always handled as confidential. If background information is kept up-to-date, it can be an invaluable guide when it comes time to move from cultivation to a solicitation.

DONOR PROSPECT PROFILES

The following information is typically contained in a prospect profile. You can add other categories to suit your needs. The only information that should be gathered is information that the organization needs to make a sensitive and informed ask.

Profile Content

- Background:
 - Hometown, current residence
 - Family
 - Education
 - Professional life
 - Religion, travel, etc.
- Relation To Your Organization:
 - Giving History
 - Gifts to your organization: Total life-time giving, largest one-time gift
 - Gifts made this year, over 3 to 5 years, or to special projects
 - Consistent giving
 - Other Philanthropic Interests
 - Other groups the donor supports
 - The largest gift they have ever made
 - Their role in other organizations
- Connection To Your Organization
 - Important past relationship within your organization
 - Networks and individuals responsible for initiating the relationship

- Accomplishments - Interests
 - Awards
 - Service on other Boards
 - Passions, hobbies/interests
 - Community involvement
- Networks
 - Memberships/Associations
 - Community involvement
 - Local leadership or other leadership program involvement
- Financial Holdings
 - Properties - value
 - Other holdings
 - Publicly traded securities

The information gathered about a prospective donor will allow an organization to respectfully approach a candidate for giving and be able to invite them to participate in a way that is most meaningful to the donor. You owe it to those you will solicit to be organized in your approach and sensitive to their philanthropic goals. Remember at all times that this is internal, confidential information. It must be managed appropriately.