HOW CHARITABLE GIVING HISTORY REVEALS PASSIONS AND CAPACITY
MAY 17, 2012 (EXCERPT FROM WEBINAR)
“NOZA changed the way I look at giving potential. I use it daily and could not live without it. We use NOZA to look for the experience of philanthropy.”

Cecelia Hogan, Director, University Relations Research
University of Puget Sound
Author, Prospect Research: A Primer for Growing Nonprofits
Twitter: @CeciliaHogan
David Lamb is a Senior Consultant with Target Analytics: A Blackbaud Company. He has been a prospect researcher since 1989.

David Lamb’s Prospect Research Page (www.lambresearch.com), is a trusted and popular resource among prospect researchers.

In 1997 he received APRA’s Service Award for outstanding service to the profession and in 2001 he was awarded the CASE’s Steuben Apple award for excellence in teaching.

DeAndrea Russell is a Prospect Research Consultant and has worked in the field of Development for 18 years with the last 13 years being concentrated in Prospect Research. She started her career at the United Negro College Fund during the organization’s $250 million capital campaign. She most recently served seven years as the Manager of Prospect Research at the United States Fund for UNICEF an international children’s relief organization.

Kathleen Rogers is the Product Manager for NOZA Philanthropy Data Services. She is the architect of NOZA Exact Match Constituent Screenings, the NOZAsearch.com’ friendly user interface, and NOZA beta test program.

Kathleen has 20 years of advocacy experience. Prior to joining Target Analytics, Kathleen worked with the founder of NOZA for 5 years and at Intel Corp. for 8 years; she held political campaign management and fundraising positions with WA State senators and elected officials; and was involved in healthcare reform.
AGENDA

1. Understanding Prospect Research
   - Focus Today is on Charitable Giving History

2. How Giving History Reveals Passions and Capacity
   - Existing Donors
   - Prospecting for New Donors

3. Live Demo

4. The Next Level:
   - NOZA Exact Match Constituent Screening

5. Additional Resources from Target Analytics and Others
WELCOME

If you need to...

• fundraise in a down economy…
• manage major gift solicitations…
• better understand your donors motives for giving…
• raise more major gifts from within your current constituents…
• tell your story to more people to find new donors whose passions align with your mission…

…Then you might be a prospect researcher
UNDERSTANDING PROSPECT RESEARCH

- Prospect research is the process of collecting, analyzing, recording, maintaining, using, and disseminating info about prospective donors
  - Good research helps you ask the right prospect for the right amount based on your understanding of the prospect’s capacity and inclination to give
  - All info is from the public record and must be applicable to fundraising

- APRA Code of Ethics
  Prospect researchers respect an individual's right to privacy. To guide researchers, the following ethical principles apply:
  - Confidentiality
  - Accuracy
  - Relevance
  - Self-responsibility
  - Honesty

See: www.aprahome.org/ProfessionalStandards/StatementofEthics
PROSPECT RESEARCH TOOLS

Blackbaud is the leading provider of prospect research tools for busy development professionals

• ResearchPoint – prospect research software
  - Real estate
  - Stock
  - Private company affiliations
  - Nonprofit affiliations
  - Biographical information
  - Affluence indicators

• ProspectPoint – custom predictive models
• NOZA Philanthropic Giving Data

See appendix for more resources
NOZA™ GIVING HISTORY REVEALS MUCH

• **Affinity** – involvement with your organization; gifts to similar organizations, or regional affinity (individual, foundation and corporate giving specific to area near you).

• **Capacity** – the largest gift found and total number of gifts. Compare this to your research of their assets and income. Annual gifts are indicator of income, major or campaign gifts indicates assets and income. Planned gifts come from assets.

• **Propensity to give** – in general, how philanthropic the person is: # of donations, recipients, total funds donated

Research Philanthropic Giving History Before Your Fundraising Outreach!
USE NOZASEARCH.COM TO PROSPECT FOR NEW DONORS

Searchable terms include:

• Donor name
• Recipient cause
• Recipient name
• Gift type (eg, planned gifts)
• Gift year
• Geographic region
DEMO: WHERE DOES NOZA DATA COME FROM?

• NOZA technology locates unstructured, publicly available charitable giving facts and converts them into an online searchable database.
• This allows NOZA users to search, download and save data anytime, quickly, easily and affordably.
THE NEXT LEVEL: NOZA EXACT MATCH CONSTITUENT SCREENING
# NOZA SCREENING EXAMPLE – DISCOVER YOUR WALLET SHARE AND FIND HIDDEN GEMS

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- **Category**: Education, Environment, Housing & Shelter, Philanthropy, Art, Mental Health & Crisis Int, Human Services, Philanthropy, Art
- **Scope**: Local
- **Donation Category**: Event Sponsorship, Capital Gift / Campaign Gift, Annual Gift, Planned Gift/Legacy Gift/Bequest/D

Actual Data for customer

This organization’s $50 donor became a new major giving prospect as direct result of the NOZA philanthropy screening.

She had been missed in past Wealth screenings.

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**Minimum Gift Total**: $226,403.00

**Total # of gifts**: 34
• Match your constituents against the NOZA database of publically available giving data that has been matched against a national consumer index to obtain household addresses.
• Now 30% of NOZA donation records have addresses for mailing lists and screenings.
• More than 21 million individual U.S. addresses and 18 million charitable households
• Proprietary patent-pending ‘exact match’ algorithm

Easy-to-read charts and graphs show meaningful patterns, trends and exceptions
Gain insight into the motivations and passions of individual donors
Find new hidden gems
1. Free NOZA Prospect Research Workbook available at [www.nozasearch.com](http://www.nozasearch.com)
2. [www.ProspectResearch.com](http://www.ProspectResearch.com)
6. Your own Local Library or Nonprofit Support Center. Eg: [www.youranswerplace.com](http://www.youranswerplace.com)
7. Grants: GuideStar, Foundation Center, GrantStation, AAGP, PSGA and funding announcements via *GrantStation Insider*.

ABOUT TARGET ANALYTICS

Leading provider of donor insight & market research to non-profits

- 22 years of experience delivering data analytic driven solutions and market research to the non-profit industry
- Over 6,000 customers, spanning all non-profit vertical market segments
- Trusted steward of the non-profit industry’s largest cooperative donor database, with over 3 billion philanthropic transactions from over 70 million U.S. households
- More than 145 employees, locations in Cambridge MA, Charleston SC, Alexandria, VA and Miami FL