

THE 10-MINUTE GUIDE TO PROSPECT RESEARCH

Before submitting a research request, you may find that with a few quick online searches you can locate enough information to decide if a prospect is worth pursuing. Prospect Research is available to assist with more detailed research and other information, including access to additional sources.

1. Check *Davie*. Look at: (a) Summary tab, including checking to see if the prospect has a rating, (b) Documentation tab for any previous research and information contained in notes including the basis of rating, (c) Wealth & Ratings page to see GG+A and Blackbaud scores (d) Interactions page, (e) Relationships tab, to see if the constituent has any Carolina connections (individuals, company, foundation), (f) UNC Household Recognition Summary tab to check past giving to Carolina, and (g) for a quick summary report create the UNC Constituent Profile. If the constituent has multiple interactions this report is the easiest way to read the interactions.
2. Google, <http://www.google.com>
Type the constituent's name into Google to find links to other websites, such as company/board biographies, news items and other source data. If the name is common, try typing their home city or company name as well (e.g. "Bill Gates" Microsoft or "Warren Buffett" Omaha)
3. LinkedIn, <http://www.linkedin.com>
LinkedIn is a comprehensive resource for self-reported employment, education, and affiliation information. LinkedIn is most effective for people that are currently employed, but a large number of constituents have LinkedIn profiles.
4. Company Website
After searching the above sources, you are likely to have an employer name. Visit the company's website and look for employee biographies, as well as information about the size and nature of the business.
5. Zillow, <http://www.zillow.com>
Enter a home address and Zillow can provide an estimated home value. Search with street address and zip code (e.g., 123 Main St, 27000).
6. GuideStar, <http://www.guidestar.org>
A search on GuideStar will allow you to see if the constituent is affiliated with a foundation. GuideStar includes access to IRS Forms 990 which is the federal form that must be filed annually by tax exempt organizations. To view the 990s you will need to create a free account.
7. OpenSecrets.org, <http://www.opensecrets.org/>
Type the name of the constituent into the OpenSecrets database to find a record of all reportable political contributions. Under the Politicians & Elections tab select "Donor Lookup". Search results usually include an address (city & state), occupation/employer, date reported, contribution amount and recipient. Search results can be ordered by relevance, name of donor, amount donated, and date of donation.
8. Yahoo! Finance, <http://finance.yahoo.com/>
Yahoo! Finance provides access to insider and restricted shareholder transactions reported over the last two years (A company insider is a director or senior officer of a publicly traded company, as well as any person or entity that beneficially owns more than 10% of a company's voting shares).
To search Yahoo! Finance you will need to know the company's ticker symbol. To find a company's ticker symbol search for the ticker symbol under the "Quote Lookup" box in Yahoo! Finance or with a Google search (company name ticker symbol).
Once you find the company, search for the "Ownership" section on the Navigation menu on the left-hand side and select "Insider Roster" and look for the constituent's name.

Your ten minutes are probably up. If you still need assistance or information, please contact Prospect Research. Remember, there is no magic website that will tell you if someone is a good prospect!