



Donor Research Checklist

Before you can turn prospects into philanthropic partners for your organization, you need to build comprehensive donor profiles. Armed with the right information, you gain insights into the best approach for engaging, nurturing and inspiring loyalty from your donors. And with more than 1.5 million philanthropic organizations competing for donor attention, timely, relevant donor data is a must. Without it, donor retention can suffer, putting you on a perpetual—and costlier—quest for new donors to fill the void.

What type of information do you need, and where can you find it?

Check out the essential data points needed at four steps in the donor research process to create a complete picture of your donors.



Confirm potential prospects

All the research in the world can't help if you don't have reliable contact information. Initial donor research builds out from the basics.

CLEANSE AND APPEND YOUR DATA

Verify or locate critical information including:

- Proper names
- Addresses
- Phone numbers
- Email
- Property ownership
- Spouse

EXPAND YOUR SEARCH

Company and executive data covering:

- 75 million executives
- 80 million companies



Create donor profiles

Create a more complete picture of prospective donors by capturing critical data about individuals and their interests, including:

INDIVIDUALS

- Employment locator
- Military finder
- Sexual offenders
- Voter registrations

CAREER

- Basic employer information
- Role at company
- Membership in professional organizations or on corporate boards
- Business affiliations within the same corporate family or other organizations

ASSETS

- FAA aircraft
- Watercraft
- Motor vehicles
- Real property

COURT CASES & FILINGS

- UCCs
- Bankruptcies, judgments & liens
- Criminal records
- Foreclosures
- Marriage & divorce records
- Sanctions

LICENSES

- Professional licenses, such as tax or healthcare
- DEA registrants
- FAA pilots
- FCC
- Hunting & fishing licenses
- Concealed weapon permits



Qualify and screen donors to target for your next campaign

Supplement donor profiles with information that helps you assess donors' propensity to give, such as:

- WealthEngine® Wealth Scores
- Larkspur Prospects of Wealth®
- VeriGift Charitable Giving from iWave
- Guidestar™
- Dun & Bradstreet®

Previous nonprofit involvement and wealth indicators combine to help you target donors that recognize the value of philanthropy AND a propensity to give. They can even help you determine what a prospective donor's 'sweet spot' is for fundraising appeals. In addition, political campaign donations offer insights into donor-supported causes that align with your mission, a willingness to act, and future giving potential.

Prospects
with 2M+
in real estate
holdings
17X more
likely to give.¹



Stay alert to donor activities 40,000+ Global News & Business Sources

- Track positive mentions of donors to keep your database current and identify natural door-openers for fundraising appeals
- Follow negative news, financial indicators, watchlists and legal filings to proactively manage reputational or financial risks posed by donors associated with your organization

High net
worth donors
give 10X
more than the
average donor.²



Connecting the dots from prospect to donor to philanthropic partner gives your organization its best chance to meet—and exceed—your fundraising goals.



Nexis® for Development Professionals

Take advantage of the comprehensive collection of information and powerful search technology that organizations around the world rely on to make informed, data-driven decisions. With one-stop access to thousands of trusted sources—premium and open web news and business sources, regulatory and legal data, wealth indicators and public records—you can spend less time researching prospects and more time building insightful donor profiles that increase donor engagement and lead to fundraising success.

1 "10 Ways to Maximize the Benefits of Wealth Screening," Double the Donation.com. Accessed at:

<https://doublethedonation.com/wealth-screenings-maximize-the-benefits/>

2 "Charitable Giving Statistics," National Philanthropic Trust. Accessed at: <https://www.nptrust.org/philanthropic-resources/charitable-giving-statistics>

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