



Prospect Research Looking for Gold



Pauline Palkovic



What is Prospect Research?

- Prospecting: internal or external
- Data analysis and modeling
- Qualification and profiling



What is Prospect Research?

1. Prospecting New Donors

- ❖ *Internal*
 - Existing DB
 - RFM
 - Screening
 - Modeling
- ❖ *External*
 - Peer supporters



2. Profiling In-depth Info

- ❖ *Biographical info*
- ❖ *Career info*
- ❖ *Wealth indicators*
- ❖ *Affiliations*
- ❖ *Philanthropic patterns*
- ❖ *Other details: hobbies, political involvement, quotes*



What makes a GOOD Prospect?

- AFFINITY
- CONNECTION
- PROPENSITY
- CAPACITY



Myths Debunked



Capacity is most important.

1. Connection 🤝 is most important.
2. Capacity is mostly about ☒ **qualifying** (or ☐ **disqualifying**) the prospect.
3. The donor 👤 decides how much they will give.
4. Past **giving** 💰 is a better indicator of the size of gift to expect than wealth.



Myths Debunked

~~A subscription to an aggregated research software is all you need~~

DonorSearch / iWave / WealthEngine / ResearchPoint / Windfall

- That data must be verified.
- It is incomplete , outdated , inaccurate .



Myths Debunked

Research takes about 20 minutes.

- Qualifying can take ~20 minutes
- Prospecting ~1.5 hours per name 
- Profiling ~5-12 hours 



Prospecting

Internally

- Your database
- RFM analysis
 - Recency
 - Frequency
 - Monetary value
- Wealth screening
 - WealthEngine
 - DonorSearch
 - iWave / Kindsight

Externally

- Key people
 - Nonprofit affiliations
 - Business connections
 - Social contacts
- Peer organization
 - Donor recognition
 - Annual Reports
 - Donor walls, etc
 - Press

Internal Prospecting

RFM Analysis



Monetary Value

Name	\$	The Year Before				Last Year				This Year				Three Year Total
		Gift 1	Gift 2	Gift 3	Gift 4	Gift 1	Gift 2	Gift 3	Gift 4	Gift 1	Gift 2	Gift 3	Gift 4	
Cole	1	\$1,000	\$1,000	\$100		\$1,000	\$1,000	\$100		\$1,000	\$1,000	\$100		\$6,300
Hart	2	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$3,000
Henson	3	\$500		\$500		\$500		\$500		\$500		\$500		\$3,000
Mori	4									\$3,000				\$3,000
Tate	5	\$0							\$3,000					\$3,000
Landry	6	\$250	\$250			\$250	\$250			\$250	\$250			\$1,500
Form	7	\$250				\$250				\$1,000				\$1,500
Gallagher	8	\$500				\$500				\$500				\$1,500
Caldwell	9	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$1,200
Drake	10	\$60				\$60	\$100			\$60	\$100	\$500	\$250	\$1,130
Whitmore	11	\$250	\$200	\$200		\$250	\$200							\$1,100

Internal Prospecting

RFM Analysis

Frequency & Recency



Name	\$	RFM	The Year Before				Last Year				This Year				Three Year Total	R	F	M	RFM Score
			Gift 1	Gift 2	Gift 3	Gift 4	Gift 1	Gift 2	Gift 3	Gift 4	Gift 1	Gift 2	Gift 3	Gift 4					
Hart	2	1	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$3,000	12	12	3.0	27.0
Cole	1	2	\$1,000	\$1,000	\$100		\$1,000	\$1,000	\$100		\$1,000	\$1,000	\$100		\$6,300	11	9	6	26
Caldwell	9	3	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$1,200	10	12	1	23
Henson	3	4	\$500		\$500		\$500		\$500		\$500		\$500		\$3,000	11	6	3	20
Drake	10	5	\$60				\$60	\$100			\$60	\$100	\$500	\$250	\$1,130	12	7	1	20
Landry	6	6	\$250	\$250			\$250	\$250			\$250	\$250			\$1,500	10	6	1.5	17.5
Form	7	7	\$250				\$250				\$1,000				\$1,500	9	3	1.5	13.5
Gallagher	8	8	\$500				\$500				\$500				\$1,500	9	3	1.5	13.5
Mori	4	9									\$3,000				\$3,000	9	1	3	13
Whitmore	11	10	\$250	\$200	\$200		\$250	\$200							\$1,100	6	5	1	12
Tate	5	11	\$0						\$3,000						\$3,000	1	1	3	5

Internal Prospecting

RFM Analysis



Marianne Pelletier

Managing Director

**5 WAYS
TO USE
RFM SCORES
IN
FUNDRAISING**



**Staupell Analytics
Group**

External Prospecting

Peer Organizations



Annual Reports

Visionaries' Circle
(\$1,000,000 +)
The Georgian Parents' Guild

Founders' Circle
(\$500,000 +)
The R. Samuel McLaughlin Foundation

Governors' Circle
(\$250,000 +)
Karen and Ray Arbesman
The Bhalwani Family
The Burry Family, The
Midloch Foundation &
WINCO Corporation
The DiCapo Family
Dr. Scholl Foundation

THANK YOU SO MUCH
CLUB DONORS
JANUARY - MARCH 2023

Alex Chaplin	CVS Pharmacy	Jeri Humphries
Alibex Zea	Cynthia Bobowiec	Jessica Portis
Alisha Ribeiro	Daniel Dos Reis	Joanne Renaud
Amber Start	Daniel Rae	Judi Humphries
Amy Lampert	Dawn Hackett	Karen Sheehan
Ann Glica	Dean Kavanagh	Kathy Selders
Ann Provost	Deana Douville	Kathy Thompson
Anonymous	Debbie & Rick Paixao	Kelli McKenney
April Burek	Denise Pascale	Kelly Boudreau
Barbara Pio	Diana & Earl Roy	Kerry Hotaling
Berkshire Bank	Dick Navin	Kim Batista
Beth Teixeira	Donna & Carl Tyburski	Kim Walker
Big Y Employees	Dorothy Maynard	
Brandon O'Brien	Ed Sokolowski	
Carla Banas	Elizabeth Alves Goodrow	

WYMAN
Transforming Teens. Changing Communities.

2015 Donors and Gifts

\$100,000 or above
Ameren Corporation Charitable Trust
Anonymous (2)
The Boeing Company
Emerson
Mr. Bob Fox and Ms. Maxine Clark
Anne and John McDonnell, John F. McDonnell Fund of the Greater Saint Louis Community Foundation**
Steward Family Foundation
Thrive Foundation for Youth
United Way of Greater St. Louis
Mr. Jess Yawitz**

\$50,000-\$99,000
Anonymous
City of St. Louis Community Development Administration
The Dana Brown Charitable Trust
The Saigh Foundation
St. Louis County Children's Service Fund
Wells Fargo Advisors

\$25,000-\$49,000
American Family Insurance
Mr. and Mrs. Carl and Kim Casale
Daughters of Charity Foundation of St. Louis
Famous Footwear

\$10,000-\$14,999
Linda and Pete Werner
William T. Kemper Foundation - Commerce Bank, Trustee**
Ameren Missouri
Caleres Inc.
Mr. and Mrs. Stuart and Jane Campbell**
Mr. and Mrs. Anthony and Kimberly Garavaglia
gridSTL.com
Mr. and Mrs. David and Christina Hilliard
Mr. and Mrs. William and Holly M. James**
Dr. Shahrdad Khodamoradi
Monsanto Fund**
Mr. and Mrs. David and Cheryl Morley
Sense Corp
Spirit of St. Louis Women's Fund**
Trilo Foundation of St. Louis**
Jane S. Tschudy
Mr. and Mrs. Scott and Carolyn Wittkop

\$5,000-\$9,999
Mr. Scott T. Alberson
Mr. and Mrs. Beau and Suzanne Brauer**
Brown Smith Wallace LLC

External Prospecting

Peer Organizations



Donor Walls

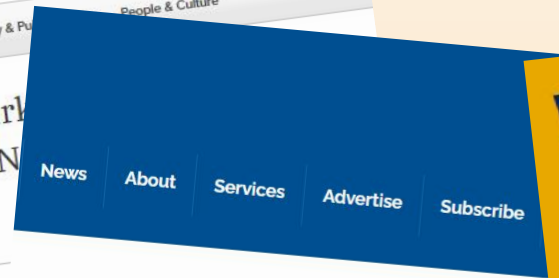
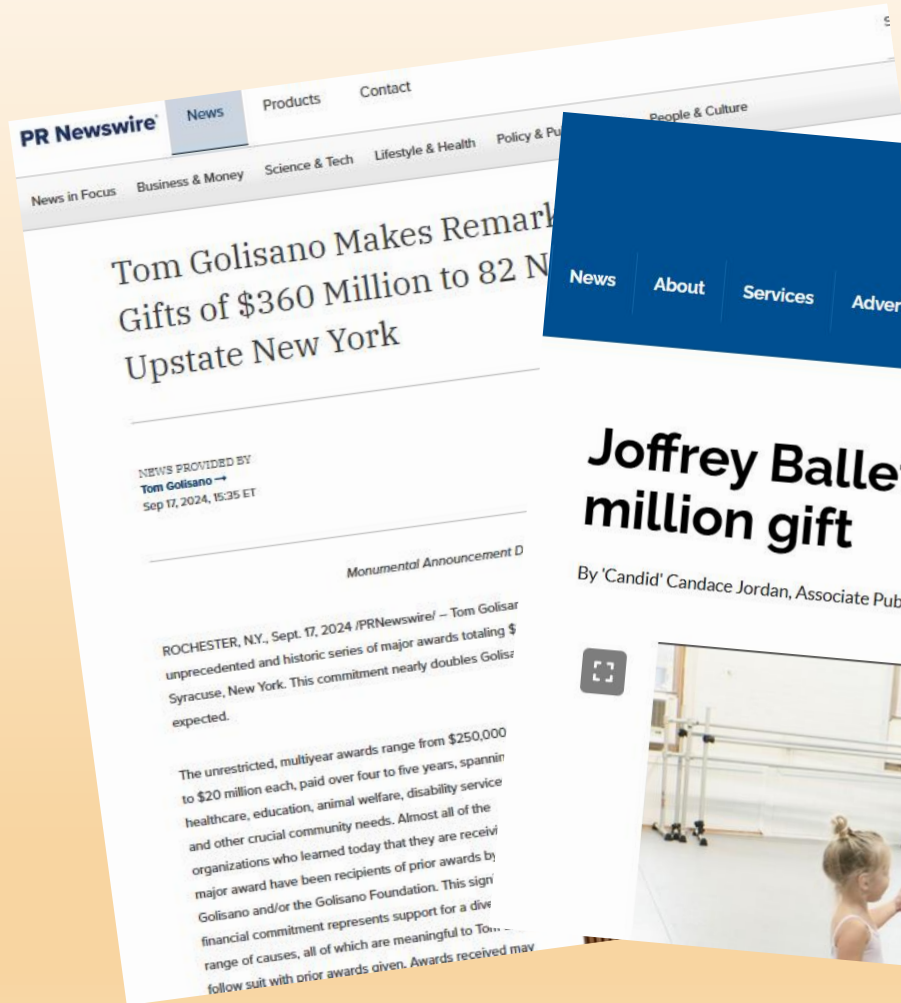


External Prospecting

Peer Organizations



Press & Newsletters



WVU grad celebrates mom's legacy with \$200K School of Nursing scholarship gift

Wednesday, June 07, 2023



Joffrey Ballet Academy million gift

By 'Candid' Candace Jordan, Associate Publisher Sep 29, 2024



Prospecting Sources

(limited only by your imagination)

Peer Organizations

- Annual reports
- Donor webpage
- Donor wall
- Board members

Local News/Mags

- Keywords
- Philanthropy
- Donation
- Donor
- Fundraiser

Google

- Keywords
- Philanthropy
- Donor/donation
- Fundraiser
- Aligned causes

Local Organizations

- Libraries
- Museums
- Rotary
- Businesses

LinkedIn

- Location
- Affiliations
- Shared contacts
- Posts
- Filter: pro bono & boards

Professional Organizations

- Financial Planning Associations
- Bar Associations
- Chamber of Commerce
- Young Presidents Association

Profiling

- Deep Dive (5-10 hours)
- Contact information
- Biographical Facts

 CONFIDENTIAL PROSPECT PROFILE
Updated January 2025

Rowan and Hazel Greenwood



Primary Residence
410 Willow Drive
North Apple, MT 12345-6789

Phone: 406-555-5872
406-109-8763

Email: r.greenwood@gmail.com (Rowan)
Hazelg124@aol.com (Hazel)

Biographical Information

Born (Rowan):	1958	Thomas Greenwood, Eleanor (Ellie) Greenwood (née Parker)
Born (Hazel):	1966	Gabriel Hawk, Susan Hawk (née Williams)
Parents (Rowan):		BS, Civil Engineering, Montana State University College of Engineering, 1980
Parents (Hazel):		MBA, Lewis and Clark College, 1986
Education (Rowan):		BA, Psychology, Lewis and Clark College, 1988
Education (Hazel):		Henrietta b. 1990. Married Marc Linden in 2019
Children:		Laurel, b. 1993. Married Sloan Hawthorne in 2022
Grandchildren:		Daphne, b. 1995.
Religious Affiliation:		Jeffrey Linden, Ezra Hawthorne United Methodist

Profiling

- Career information
- Financial Facts
 - Net worth
 - Salary
 - Real Estate Holdings
 - Investments
 - Luxury ownership



Career Information:

Rowan Greenwood is Chairman Emeritus of Greenwood Industries in North Apple, MT. Mostly retired, he keeps a desk (as of 2022) at the company's headquarters and serves on the company's advisory board.

Before establishing Greenwood Industries in 1991, Rowan was Chief Operating Officer with Cascade Infrastructure Group. Prior to joining Cascade in 1989, he was Vice President of Operations at Summit Engineering from 1986 to 1989, and Director of Project Development at Flint River Construction from 1984–1986. Rowan began his career in 1980 as a civil engineer with Northern Horizons Engineering, specializing in concrete technologies and structural solutions for industrial facilities.

One of the largest privately owned manufacturers of mobile concrete batching plants in the US, with revenues between \$100 million and \$150 million, Greenwood Industries supplies mobile concrete batching plants to over 1,000 concrete producers, including Cemex, Lafarge Holcim, Martin Marietta, and Buzzi Unicem, who manufacture blocks, bricks, pavers, veneer stone, and other precast products. The company is currently a certified woman-owned business since Rowan's daughter, Henrietta, now President and CEO, took over in 2022. Rowan and Hazel's daughter, Henrietta, joined the company after college in 2013 and spearheaded an expansion into the mining industry. The company is poised to become an industry leader in repurposing abandoned mines for renewable energy projects such as solar facilities and micro-hydroelectric power plants.

All three daughters work in the company, Laurel as marketing and sales manager, and Daphne as GM of Supply Chain and Logistics. Henrietta's husband, Marc Linden, serves as VP of Operations. Henrietta, Laurel, and Daphne are the primary shareholders. Laurel's husband Sloan sits on the company's advisory board.

Financial Information:

Net Worth:

Not available

Salary:

\$210,000 (estimated private company chairman compensation per salary.com)

Real Estate

\$1,830,500 (410 Willow Drive, North Apple, MT)

Stock:

Research indicates Rowan and Hazel sold their shares in Greenwood Industries to their children. Other stockholdings are not public information.



Profiling

- Affiliations
- Awards
- Hobbies

Affiliations (Rowan):

Rowan:

Director – Bozeman Health

Trustee – ~~Shodair~~ Children's Hospital

Chair – Montana Arts Council

Trustee – Museum of the Rockies

Trustee – Montana Economic Development Association

Chairman of the Board – Ellen Theatre

Affiliations (Hazel):

Trustee – Missoula Art Museum

Trustee – Tippet Rise Art Center

Trustee – Rural Health Exchange Montan

Awards (Greenwood Industries):

2017 Montana Employer of Choice

2015 Innovation in Construction Award - American Society of Civil Engineers

2014 Industry Leaders List - Concrete Products Magazine

2011 Montana Family Business Awards

2001 Top 40 under 40 – Forbes Magazine (Laurel)

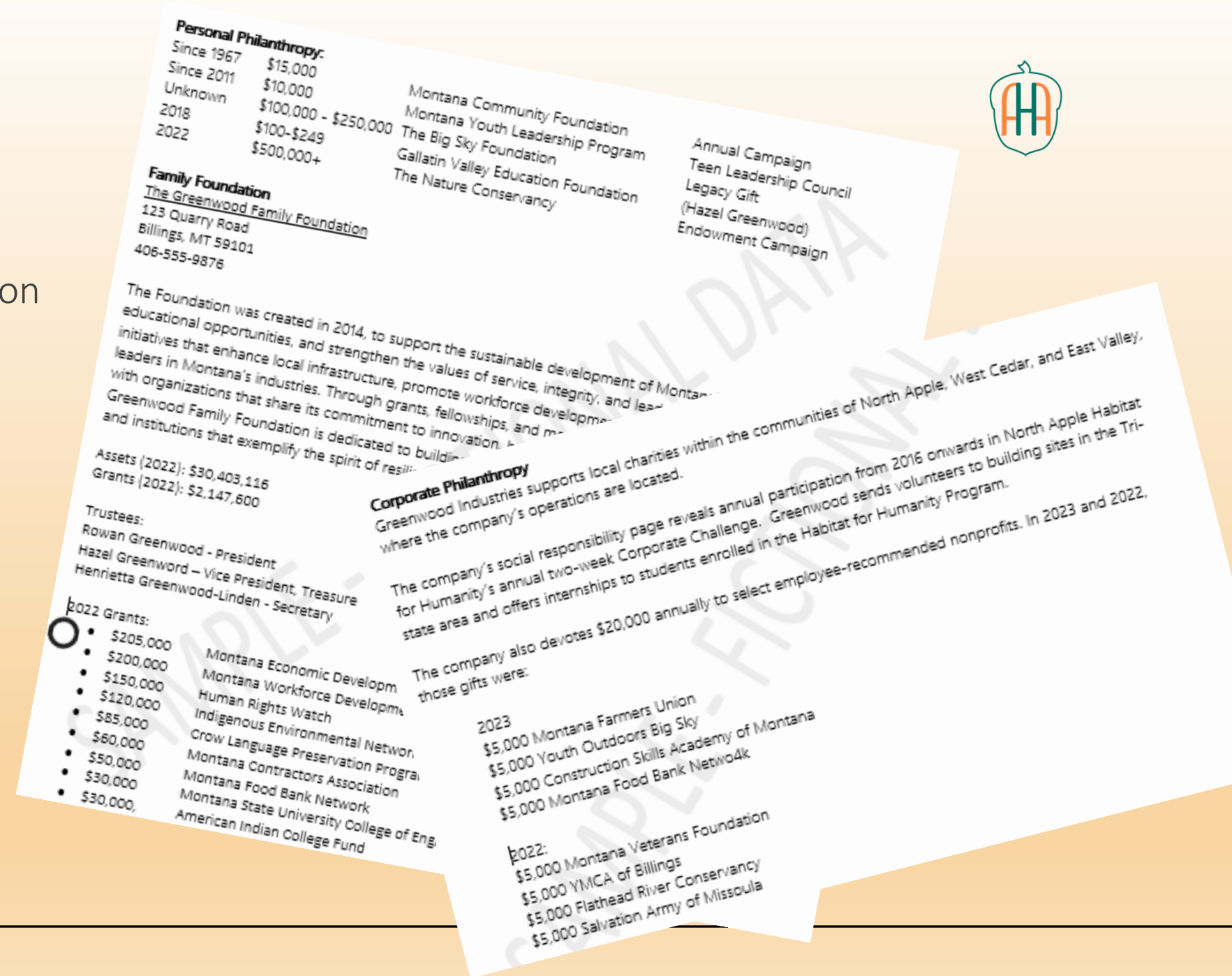
Hobbies (Rowan):

Golf, Horticulture.



Profiling

- Philanthropy information
 - Personal giving
- Family Foundation
 - Assets
 - Trustees
 - Gifts
- Corporate Giving



Profiling

- Family
 - Prospect
 - Children
 - Siblings
 - Parents



Family Information:

A native of Montana, **Rowan Greenwood** was born in Helena, one of four children. His mother, Eleanor (Ellie) Greenwood ran Helena Hardware in Helena, Montana. They moved to Helena from Wales in 1938. His mother, Eleanor (Ellie) Greenwood, was born in Wales and settled in Helena in the 1860s and turned to

Hazel Hawk Greenwood is a writer and journalist. A member of the Crow Nation, she has published articles and op-eds in prominent outlets including *Social Gaps in Rural America* and *Whispers of Psychology Today*, *Montana Quarterly*, and *The Clark College* in 1988. In addition to her writing, Hazel is a Native American rights activist, actively working to raise awareness of modern world. Alongside her literary work, Hazel has been involved in various charitable initiatives in Montana. Hazel served on the Crow Tribal Council for over a decade and has co-founded several cultural preservation programs, including the Crow Language Preservation Program. Hazel's mother is now 81 and lives with Rowan and Hazel.



Rowan and Hazel's daughter, **Henrietta Greenwood** married her son, Alder, in 2021. In 2018, she earned her MBA from the University of Montana, focusing on strategic management. She graduated from Montana State University, where she focused on environmental engineering, during which she interned with BrightLeaf Energy, an innovative renewable energy



Henrietta's husband, **Marc Linden**, Marc Linden was Operations Manager at Mountain Ridge Components prior to joining Greenwood Industries. He began his career as a production engineer at Cascade Machinery, after earning a bachelor's degree in mechanical engineering from Oregon State University in 2008. Originally from Boise, ID, Marc is one of four brothers, and his family has operated a successful farm equipment business for decades.



Laurel Greenwood Hawthorn married Sloan Hawthorn in 2022, and the couple resides in North Apple, MT. She joined Greenwood Industries in 2018 after gaining experience as a Marketing Associate at Horizon Strategies, where she focused on brand development and client relations. Laurel earned her bachelor's degree in business administration from the University of Colorado Boulder in 2015. During college, she interned at Peak Marketing Solutions, a leading advertising firm, and Synergy Digital, a tech startup specializing in e-commerce platforms. She was born in 1993.



Laurel's husband, **Sloan Hawthorn** is the founder and Director of Operations at WildPeak Climbing, which specializes in professional rock-climbing training, competitive climbing events, and guided expeditions. Prior to launching WildPeak in 2019, Sloan competed professionally in rock climbing and worked as an instructor for the National Outdoor Leadership School (NOLS), specializing in high-altitude climbing and wilderness survival. He earned an MBA from the University of Colorado Boulder in 2014, a bachelor's degree in Environmental Studies



Profiling Sources

(limited only by your imagination)

Contact Info

- TruePeopleSearch
- ClusterMaps
- Email Hippo

Biographical Info

- Magazine Profiles
- Professional Biographies
- Wikipedia
- Obituaries
- Social Media

Affiliations

- LinkedIn
- ProPublica Name Search

Professional Info

- LinkedIn
- Company Website

Company Info

- OpenCorporates
- GuruFocus
- SEC/EDGAR

Real Estate

- Zillow/Trulia/etc
- RealtyHop
- Parcel Viewers
- Tax Rolls

Philanthropy

- News
- Newsletters
- Annual Reports
- Family Foundation
- Company CSR

Wealth Indicators

- Net worth
- Forbes Lists
- Company ownership
- Yacht or Plane ownership
- Event attendance



The Value: Qualification

Affinity, Propensity, Connection, Capacity

OR

✗ Disqualification ✗



The Value: Insights

Insights that lead to
authentic trusting relationships



People give to people they trust.





Additional Resources

- [The Wayback Machine](#) (Internet Archive)
- [Foundation Directory](#) (Library)
- [Helen Brown Group Resource List](#)
- [Aspire Research Resource List](#)
- [APRA PRSPCT-L](#)
- [APRA UNIVERSITY](#)



Can you be your own researcher?

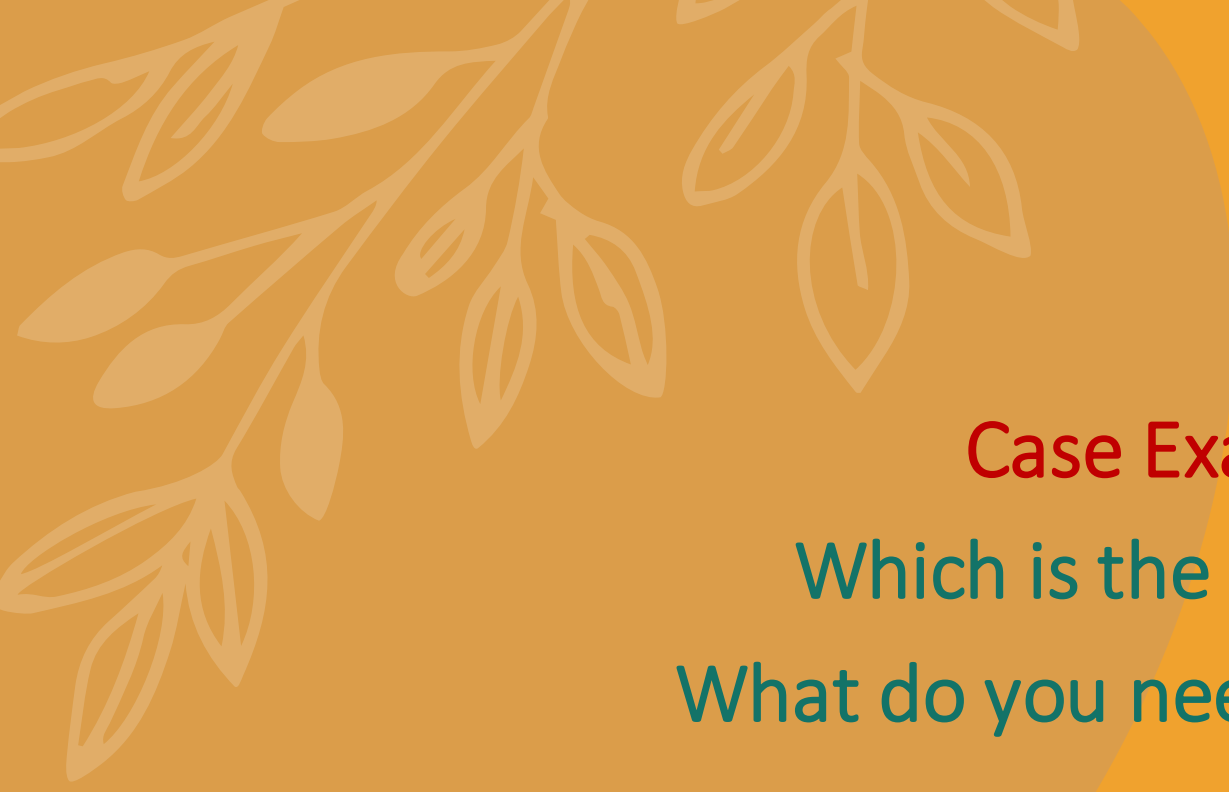
Absolutely!

BUT

Is it the best use of your time?

Is it the best use of your skills?

Q&A



Case Examples

Which is the top priority?

What do you need to reach out?

Case Examples

Name: Susan Miller

Age: 62

Residence: Owns home locally (purchased 1998)

Marital Status: Married to David Miller

Occupation: Recently retired public school administrator

Giving History to Your Organization

2012–2024: Annual gifts ranging from \$250–\$500

Increased to \$1,000 once in 2019 (special appeal)

Attends annual spring event most years

No personal visits on record

No volunteer role

External Indicators

Home currently valued at approximately \$925,000

Second property jointly owned in coastal North Carolina

Husband listed as principal of small engineering firm

Susan serves on library foundation board (small local org)

Couple gave \$5,000 to local hospital foundation (public report)

No obvious political mega-giving

No known family foundation

Internal Notes

Development Director describes her as “warm and loyal”

Once mentioned interest in arts education programming

Has never been asked for more than \$1,000

Name: Michael Chen

Age: 54

Residence: Primary home in your city; penthouse purchased 2021

Occupation: Founder and CEO of regional logistics company (privately held)

Giving History to Your Organization: None

External Indicators

Company estimated revenue: \$80M annually

Sold minority stake to private equity firm in 2022

Donated \$250,000 to local university business school (naming recognition)

\$100,000 gift to children’s hospital (campaign listing)

Serves on advisory council of regional economic development group

Member of same country club as one of your board members

No public giving aligned directly with your mission area

Internal Notes

Executive Director met him briefly at chamber event

Board member says, “He’s very private.”

No known prior engagement with your programs

Name: Karen Alvarez

Age: 48

Board Member Since: 2019

Occupation: Senior Partner at regional law firm

Giving to Your Organization

\$5,000 annually (board expectation is \$5,000 minimum)

Attends most board meetings

Hosts one small cultivation gathering per year

Network Indicators

Firm represents several high net worth real estate developers

Listed in industry publications as “Top 100 Attorneys”

Co-chairs city arts council gala

Serves on private school advisory board

Connected on LinkedIn to multiple individuals with significant visible wealth

Internal Notes

When asked about introductions, says “My clients prefer privacy.”

Comfortable speaking at events

Has not personally made a stretch gift

Appears well respected by other board members

Thank You!



Pauline Palkovic
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