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**THE QUESTIONNAIRE**

**CHAPTER 1 – Contact Information**

1. Please give us the following contact information
2. Name:
3. Company:
4. Work Title:
5. Country:
6. Email Address:
7. How many full time equivalent fundraisers or advancement professionals does your organization have?
8. Your organization might best be described as:
9. Library
10. College
11. Museum
12. Foundation
13. Other (please specify)
14. Which of the following is your organization Introduction

1. Public College
2. Private College
3. Not an Educational Institution
4. How much did your organization spend for information for prospect research in the past year? Include conferences and seminars, books, info resources, forfee websites, research reports, directory subscriptions and other such resources.
5. Have you ever used any of the following prospect search sites or resources?
   1. OpenSecrets.org
   2. DonorScope
   3. David Lamb's Prospect Research Page
   4. SearchSystems.net - The Largest Public Records Directory
   5. Vital Records
   6. DonorSearch
   7. Marquis | Who's Who's on the Web
   8. ProspectResearchResources.com
   9. WealthEngine
   10. Million Dollar List
   11. How America Gives | Chronicle of Philanthropy
   12. International Donor Research Resources
   13. Portico | University of Virginia
   14. Philanthropy News Digest (PND) | Foundation Center
   15. Research Links | APRA
   16. The Political Graveyard
   17. Development Research | Stanford University
6. Which is the single most useful website for your overall research effort into locating wealthy donors and what do you get from this site?

**CHAPTER 2 – Donor Screening**

1. Which sites or resources are the most useful for discovering individuals who have recently had a large increase in their income or net worth for the reason stated below:
2. Divorce Settlement Records
3. Inheritance Records
4. Increases in liquidity or Net Worth through sale of companies or stocks/bonds increases in liquidity or Net
5. Worth through sales of real estate
6. Annual Bonuses and Large Salary Increases
7. Does your organization use any form of donor screening software or web-based screening application? If so which ones?
8. How much did your organization spend for donor screening software or web based donor screening applications in the past year?
9. Describe how your organization has developed apps, macros or software approaches to enhance your donor database with information from external sources.

**CHAPTER 3 – Use of Consultants**

1. Have you ever used a prospect research consultant or alumni advancement consultant?
2. Yes
3. No
4. How much did you spend on the consultant and for what specific services?

1. Overall what is your experience with paid consultants who advise on how to find and cultivate wealthy prospects?
2. Save your money
3. Some help but not so effective overall
4. Most are useful and worth the money
5. Essential

**CHAPTER 4 – Researching the Networks of Your Existing Donors**

1. Does your organization make a significant effort to research the social and professional networks of donors who have given large sums to your organization?
2. Yes
3. Yes, but not as much as we should
4. No, not really
5. No, not at all
6. How fruitful a use of your time would you say it has been to research the personal and social networks of major donors to your organization vs. other uses of your research and prospect hunting time?
7. Generally much more fruitful than other tactics
8. Often more fruitful than other tactics
9. One among many effective use of my time
10. Cannot say it is as effective as many other uses of my time
11. have never really done much of this kind of research

**CHAPTER 5 – Modeling and Rating Wealthy Donors**

1. Has your organization come up with a statistical profile of your best prospects for wealthy donors with information on income levels, past donor history, political or cultural affiliations or beliefs, and other factors that increase the likelihood of giving to your organization?
   1. Yes
   2. No
2. Has your organization developed any form of statistical model or rating system to help predict who is most likely to give from your donor or prospect base or from the general public?
3. Yes
4. No
5. Can you describe how you have gone about developing this model or rating system?
6. In compiling your profile or model of your most likely donors what are the variables or characteristics that you feel most strongly correlate with giving to your institution or cause?
7. Giving to which other organizations do you feel most strongly correlates with giving to your institution? in other words do you look for contributions to organizations similar to your own as an indicator?

**CHAPTER 6 – Training**

1. Has your organization paid for any formal training of any kind into researching wealthy donors likely to give to your organization or cause?
2. Yes
3. No
4. If so what form has this training or education taken. Seminars? Webinars? Formal courses? Which organizations offered the training or courses?

**CHAPTER 7 – Bequests**

1. Does your organization use or maintain a database of information about bequests so that you can identify prospects most likely to include your organization in wills or as insurance beneficiaries?
2. Yes
3. No
4. Has the organization developed a rating system or predictive model to identify the best prospects for bequests?
5. Yes
6. No

**CHAPTER 8 – Corporate Donors**

1. What are your preferred means for researching trends in corporate philanthropy?

**CHAPTER 9 – Social Media as a Research and Lead Development Tool**

1. Describe how your organization uses LinkedIn as a tool to locate possible donors? What kind of filters do you use in searching? How does the use of LinkedIn compare to the use of other search resources? How much time do you advise others put in to master use of LinkedIn compared to other options?

**CHAPTER 10 – Parting Advice**

1. How does your organization use Facebook as a tool for locating donors?
2. If your organization develops profiles of likely donors what kind of information do you track about likely donors?
3. How is access to information about donors shared in your organization? Do some fundraising centers claim "rights" so to speak to approach certain individuals while competing fundraisers that may work in a different office in your organization are asked not to compete? How is this potentially delicate issue handled?
4. How would you advise your peers on the most effective ways to use locate wealthy donors most likely to give to your organization or cause?

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Calgary Health Trust

Colonial Williamsburg Foundation

Colorado School of Mines Foundation

Columbia College

Cornerstone University

Dartmouth College

Fairfield University

Fisk University

Florida Institute of Technology

Georgia Southern University

Hartwick College

KSU Foundation

LCMS

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London School of Hygiene &Tropical Medicine

Montana State University Alumni Foundation

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Norfolk State University

Northwest Nazarene University

Old Dominion University

RESOLVE Campaign

School for Social Entrepreneurs

Southwestern Illinois College

Steenhorst-Baker

Tate

The Scripps Research Institute

The University of the South

The Walters Art Museum

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