



Presented by:
Bond Lammy


ADRP Midwest Regional Conference

Using Prospect Research Techniques to Create Meaningful Donor Experiences

April 20, 2016

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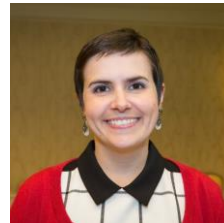
Bentz Whaley Flessner



About Me

Senior Associate, Bentz Whaley Flessner;
specializing in prospect development.

Over 10 years experience working
at or with social service, healthcare,
university, humanitarian, and
conservation organizations.



APRA Board of Directors.



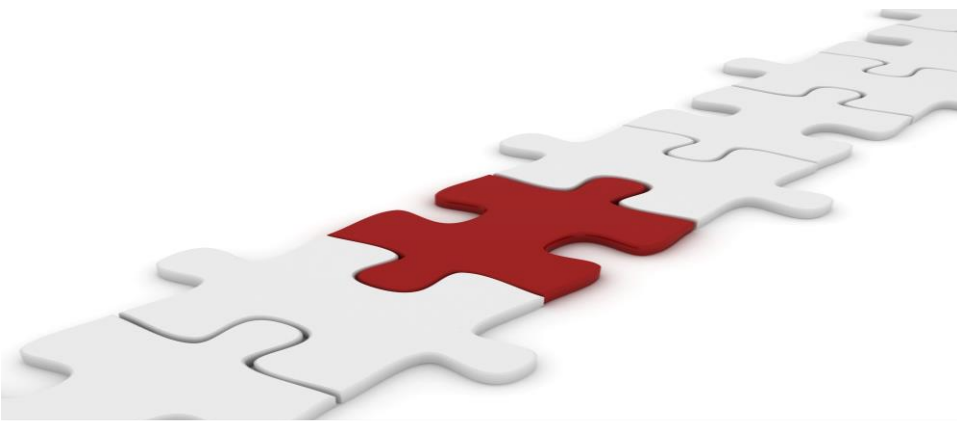
Session Outline

- Prospect Research Fundamentals
- Prospect Research and the Donor Experience
- Resources
 - Philanthropic Giving Behaviors
 - Business Interests
 - Relevant Personal Information
- Putting it all Together

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Prospect Research Fundamentals

Prospect Research

Prospect Research Definition

- Gathering specific knowledge that will inform prospect cultivation strategies. Includes:
 - Individual prospect giving capacity (total ability to make a gift over a five year period of time).
 - Philanthropic tendencies.
 - Areas of giving interest.
 - Preferred methods of giving (planned/deferred gifts, assets, tax considerations).
 - Life cycle considerations (children in college, early in career, etc.)
 - Needs (meeting needs helps develop loyalty).
 - Network (professionally, in the community, etc.)—can the prospect influence others (in their family, in their community, in their profession) to make gifts?

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Research Sources

Types of information that can usually be found and/or collected:

- Real Estate Ownership
- SEC Filings (if an insider or director at a public company)
- Board Affiliations
- Charitable Donations
- Boat or Airplane Registrations
- Biographical and Family Information
- Current and Past Addresses
- Employment History
- Obituaries
- Directories of Attorneys and Physicians
- News and Press Releases
- Spouse Name
- Age
- Company Sales, Description, and Top Executives
- Foundation Trustees, Assets, and Giving History

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Research Sources

Types of information that can be difficult to find and/or collect:

- Private company ownership and valuation.
- Compensation, unless an officer at a public company.
- Children, if under the age of 18.

Types of information that cannot be found and/or collected:

- Value of funds managed by groups, such as community foundations.
- Bank account or credit information.
- Valuation of liabilities (loans, mortgages, debts).
- Value of disposable or liquid assets.
- Stock holdings of non-officers.

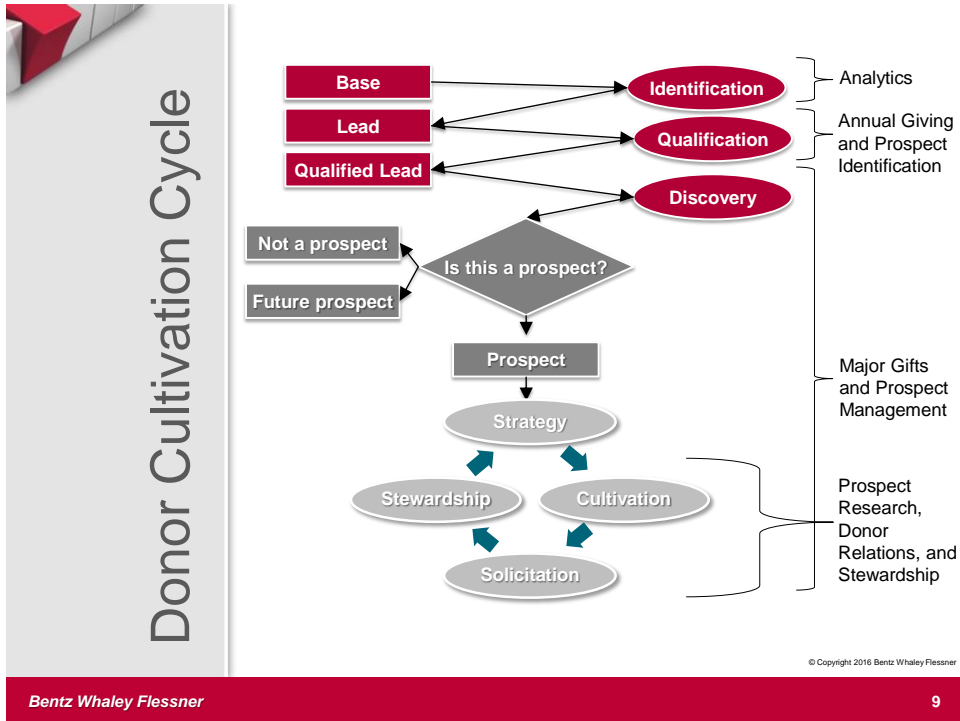
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Prospect Research and
the Donor Experience



Prospect Research and Donor Relations

Prospect Research

- Gathering specific knowledge that will inform prospect cultivation strategies. Includes:
 - Individual prospect giving capacity.
 - Philanthropic tendencies.
 - Areas of giving interest.

Donor Relations

- Gathering specific knowledge that will inform donor stewardship strategies and using this information to develop and refine:
 - Donor engagement plans by segment.
 - Personalized stewardship plans.
 - Acknowledgement, recognition, and reporting guidelines.

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Prospect Research and Donor Relations

Similarities

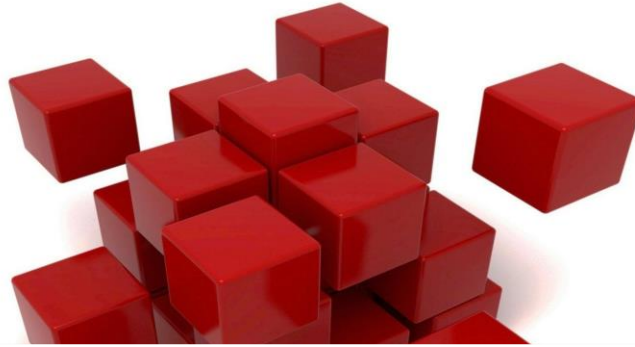
- It is easier to refine/respond to organizational needs when we understand institutional priorities and can respond directly to leadership's needs.
- We depend on a certain level of segmentation in order to manage our work.
- We focus the majority of our work on our organization's top prospects.

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Prospect Research and the Donor Experience

	Organizational Needs	Segmentation	Top Prospects
Philanthropic Interests	X	X	X
Business Information		X	X
Personal Background			X
Philanthropic Giving Capacity		X	
Aligning Deliverable to Prospect Stage	X		

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Resources—Philanthropic Giving

Philanthropic Giving

What can we learn?

- Capacity to Give
- Passions
- Priorities
- Families
- Method of Giving:
 - Family Foundation
 - Donor Advised Funds
 - In-Kind
 - Volunteer
 - Stock Transfer

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Philanthropic Giving—Resources

Organization Details

City: _____

State: _____

Schedule B (Form 990, 990-EZ, or 990-PF) (2013) Page 2

Name of organization: **FOGLIA FAMILY FOUNDATION** Employer identification number: **36-3925857**

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	VINCENT W. FOGLIA 43 CASTLETON COURT NORTH BARRINGTON, IL 60010	\$ 3,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

NOTE: You may use a 'K' for thousands, an 'M' for millions, or a 'B' for billions (e.g., 100K, 3.5M, etc.)



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Philanthropic Giving—Resources

SPECIAL REPORT
FEBRUARY 09, 2016



The 2016 Philanthropy 50



Last year was hard on megagift donors. Uneasiness about the country's growing inequality revved up the criticism that often follows philanthropy by the wealthy: The gift does nothing for the common good; or it's a pittance of the donor's wealth.



University of Chicago gets \$35 million gift for new urban institute



The main walkway on the campus of the University of Chicago on Sept. 20, 2015. *London Johnson/Chicago Tribune*

By **Diana Khoshdel** - **Contact Reporter**
Chicago Tribune

The University of Chicago will establish a new think tank devoted to researching urban issues, thanks to a \$35 million gift by the head of a major investment research firm.

U. of C. plans to launch the Mansueto Institute for Urban Innovation, university officials announced Wednesday. The center is named for its benefactors, Morningstar CEO Joe Mansueto and his wife, Rita.

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Philanthropic Giving—Resources

DONOR SEARCH GiftSearch Prospect Generator Integrated Search My Portfolio Customer Resources

NOZAsearch™ Home How It Works Pricing About NOZA Search My Lists My Account

Gift Search

Search: (Check to search exact phrase) Use NickNames

Search the world's largest database of charitable donations

SOURCE	HIGH	LOW	TYPE	GIFT YEAR	DONOR
Annual Reports	\$100,000	\$100,000	Other / Unknown	2007	Museum Of Industry C
Annual Reports	\$50,001	\$50,000	Annual	2007	The Museu And Indust
Annual Reports	\$50,000	\$50,000	Annual	2008	The Museu And Indust
Annual Reports	\$50,000	\$50,000	Annual	2008	The Museu And Indust
Annual Reports	\$50,000	\$50,000	Annual	2007	Museum Of Industry C
DonorSeries	\$49,999	\$25,000	Annual	1997	Museum Of Industry C
Annual Reports	\$24,999	\$10,000	Annual	2000	Museum Of Industry C
Annual Reports	\$9,999	\$5,000	Annual	2007	Museum Of Science And Industry
Annual Reports	\$9,999	\$5,000	Annual	2009	Museum Of Science And Industry
Annual Reports	\$9,999	\$5,000	Annual	1999	Museum Of Science And Industry
Annual Reports	\$9,999	\$5,000	Annual	2009	Museum Of Science And Industry

Recipient Name: City (Selected State from above): Minimum Gift Amount: Year:

Zip Start: Zip End: Gift Category: Recently Added Data In Noza:

General Cause: Search

General Cause List: Animal Related, Art, Civil Rights, Community Improvement & Capacity Building, Crime & Legal-Related, Education, Employment, Entertainment, Food, Agriculture & Nutrition, Health Care, Housing & Shelter, Human Services, International, Medical Research, Mental Health & Crisis Intervention

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Philanthropic Giving—Resources

PRO PROSPECT RESEARCH ONLINE Alerts Searches My Account

Search People: eg John Doe...

360 Search Profiles ZoomInfo Dun and Bradstreet Donations Real Estate Prospects of Wealth Track Wealth Political Giving Foundations/Charities SEC

Change Country:

United States

Donor (11) Recipient

Search: Clear

Animal Related
Arts Culture and Humanities
Civil Rights Social Action and Advocacy
Community Improvement
Crime Legal Related

Gift Information
Type:
Year:
Value Range: 2010,2016
 -
 Include Unspecified

Donor Name	Type	Gifts Given	Gift Year	Gift Type	Gift Range	Recipient Name
United Way of Metropolitan Chicago		632	2010	Other	\$1,035,070 - \$1,035,070	YMCA of Metropolitan Chicago
United Way of Metropolitan Chicago		632	2010	Other	\$1,035,070 - \$1,035,070	YMCA of Metropolitan Chicago
Vince and Pat Foglia		10	2014	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
The Foglia Family Foundation		5	2014	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
The Foglia Family Foundation s		1	2011	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
Anonymous		180005	2012	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
Anonymous		180005	2013	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
The Foglia Family Foundation		5	2013	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
Vince and Pat Foglia		10	2013	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
Paul F. and Barbara J. Hills		1	2013	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago
The Robert R. McCormick Foundation		22	2013	Annual Gift	\$1,000,000+	YMCA of Metropolitan Chicago

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Resources—Business Interests



Business Interests

What can we learn?

- Source of Wealth
- Business Associates
- Company Funding Priorities
- Nonprofit and For Profit Board Memberships
- Tenure in Industry
- Company News
 - Successes
 - Failures
 - Mergers and Acquisitions

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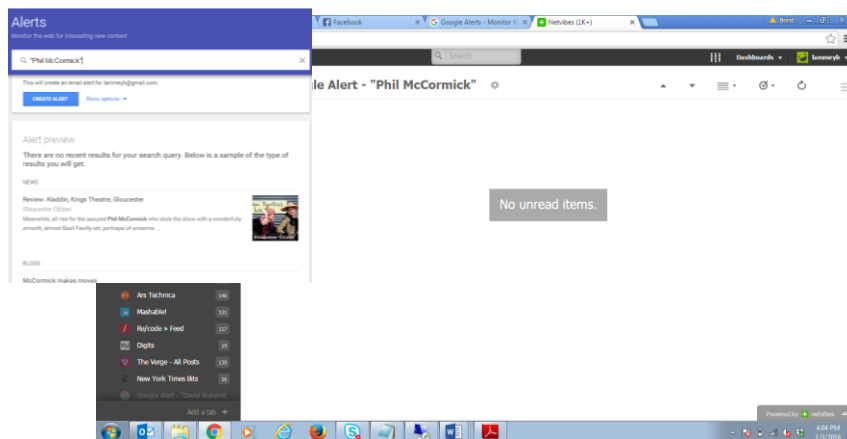
Business Interests

What to look for:

- Internal Resources
 - Donor/Alumni Portal
 - Database
 - Event Attendance
- External Resources
 - LinkedIn
 - News Articles
 - Company Websites
 - Newsletters
 - Conference Bios
 - Board Bios
 - Zoominfo
 - Securities and Exchange Commission Documents
 - Federal Election Commission
 - Dun & Bradstreet
 - Hoovers
 - Wealth Screening Vendor

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Business Interests—Resources



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Business Interests—Resources

UNIVERSITY of NOTRE DAME

COLLEGE of ARTS and LETTERS

Computer Applications Program

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TBS Minor
Courses
Career Opportunities
Documents and Resources
Faculty and Staff
Alumni

Kevin McCarter

Kevin McCarter graduated from the University of Notre Dame in 1985 with a B.A. degree in Economics with a CAPP minor. Kevin credits his CAPP experience with raising his awareness of technology and piquing his interest in a career in consulting, which led him to accept an offer to start his career as a consultant at Arthur Andersen in Chicago. After earning his M.B.A. from the University of Chicago in 1990, Kevin joined Deloitte (then Deloitte & Touche) as a senior consultant, eventually becoming a partner in its consulting practice in 1998.



Over the past few years, Kevin's work has been primarily focused in the area of healthcare IT consulting, although his experience in leading successful large-scale IT implementations has led to some interesting recent assignments involving the turnaround of large troubled projects in other areas of Deloitte's practice.

Kevin is responsible for bringing Notre Dame into the forefront of Deloitte Consulting recruiting efforts, and is now the lead partner in charge of recruiting for Deloitte Consulting at Notre Dame.

Kevin and his wife Kimberly (ND '85) live in Naperville, IL and are the parents of 5 children. Their oldest, Conor, is a member of Notre Dame's Class of 2015.

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Business Interests—Resources

www.mccormickfoundation.org/board-of-directors


Ruthellyn Musil

Ruthellyn Musil retired as Tribune Company's senior vice president/corporate relations in 2007. As the company's senior communications executive, Musil served as spokesperson for the company to the investor and financial communities. She also directed Tribune's external and internal communications activities.

During a 36-year career with the company, Musil also held a number of positions at the Chicago Tribune, including public relations manager and director of employee communications. She joined the company in 1971, working in the newspaper's marketing department.

She is a member of the board of trustees of Loyola University Chicago, and serves on its executive committee. In addition, she is a member of the board and grants committee of the Vandehey Foundation, a supporting organization of the Community Foundation of the Fox Valley Region, headquartered in Appleton, Wisconsin.

A Chicago area native, Musil holds a BA in English from Loyola University Chicago and received an MBA from Northwestern University's Kellogg Graduate School of Management.



Scott C. Smith

Scott Smith completed his 30-year career as a Tribune Company executive in 2008. From 2004 to 2008, he served as president of Tribune Publishing, overseeing the company's newspapers and interactive businesses. From 1997 to 2004, and again from 2006 to 2008, he was president and publisher of the Chicago Tribune, leading the newspaper plus related Chicago and print and digital businesses. Previously, he was publisher of the South Florida Sun-Sentinel, Tribune's senior vice president/development, and chief financial officer, and held additional positions at Tribune beginning in 1977. He started his career at Northern Trust in 1973.

Smith is currently active with a number of leading Chicago area not-for-profit organizations, serving on the boards of the Robert R. McCormick Foundation, National Louis University, Chicago Public Education Fund, University of Chicago Charter School, Chicago Symphony Orchestra, Northwestern Memorial Foundation, Mather Lifeways, and Kellogg School of Management.

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Business Interests—Resources

www.zoominfo.com/p/Kevin-McCarter/1217269936

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Kevin McCarter (Along Kevin McCarter)

Partner

Phone: (312) ****-**** [Connect](#)

Local Address: Chicago, Illinois, United States

Deloitte LLP
1633 Broadway
New York, New York 10019
United States

Company Description: Deloitte (Deloitte LLP) is among the country's leading professional services firms. Deloitte LLP is the United Kingdom member firm of Deloitte Touche Tohmatsu... [more](#)

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It's free and takes 30 seconds

What is ZoomInfo Pro?
See how you can use our premium business search tool to find business people in seconds.

Background

Employment History

DC Principal
DC

Web References

Kevin McCarter: National...
[www.zinfo.com](#) (cached)
Kevin McCarter: National Provider IT Leader, National Life Sciences & Health Care Practice, Deloitte Consulting LLP

Other People with this Name (3,199)

Other People with the name "McCarter"

Jim McCarter
Per AFCA

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Business Interests—Resources

FREDERICK H WADDELL



FREDERICK H. WADDELL, Director since 2006, Age 60

Chairman of the Board of the Corporation and the Bank since 2009 and **Chief Executive Officer** of the Corporation and the Bank since 2008. Previously, Mr. Waddell served as President of the Corporation and the Bank from 2006 to 2011, Chief Operating Officer of the Corporation and the Bank from 2006 to 2008, and Executive Vice President of the Bank from 1997 to 2006 and of the Corporation from 2003 to 2006.

Mr. Waddell is a Class A Director of the Federal Reserve Bank of Chicago and a director of AbbVie, Inc.

Since joining Northern Trust in 1975, Mr. Waddell has held leadership positions in a variety of the Corporation's business units. The Board concluded that Mr. Waddell should serve as a director based on his experience and ongoing responsibilities with respect to the Corporation's businesses.

Federal Election Contributions

Name	Organization	Location	Date			
WADDELL, FREDERICK H	Banker	Chicago, IL	2013-03-29			
WADDELL, FREDERICK H		Winnetka, IL	2013-01-15	Northern Trust Corporation Federal Political Action Committee (Northern Trust Federal Pac)	Others	\$1,000 Medium Details
WADDELL, FREDERICK H	Banker	Winnetka, IL	2013-01-15	Northern Trust Corporation Federal Political Action Committee (Northern Trust Federal Pac)	Others	\$1,000 Medium Details
WADDELL, FREDERICK H	Banker	Winnetka, IL	2012-12-15	Northern Trust Corporation Federal Political Action Committee (Northern Trust Federal Pac)	Others	\$1,000 Medium Details
WADDELL, FREDERICK H	Banker	Winnetka, IL	2012-10-15	Northern Trust Corporation Federal Political Action Committee (Northern Trust Federal Pac)	Others	\$1,000 Medium Details
WADDELL, FREDERICK H	Banker	Winnetka, IL	2012-09-30	Northern Trust Corporation Federal Political Action Committee (Northern Trust Federal Pac)	Others	\$1,000 Medium Details
WADDELL, FREDERICK H	Banking	Winnetka, IL	2012-05-22	Judy Biggett For Congress	Republican	\$1,000 Medium Details
WADDELL, FREDERICK H	Banking	Winnetka, IL	2011-11-09	Runney For President, Inc.	Republican	\$2,500 Medium Details

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Business Interests—
Resources

HOOVERS 866-473-3932 Search for a Company

Company Profile

Information For Sales Preparation Marketing Contacts Competition Revenue & Financial

Available Products Company Report Food Manufacturing Industry Report Bakery Product Manufacturing Industry Report Meat Product Manufacturing Industry Report Competitive Reports Technology Report

THE HILLSHIRE BRANDS COMPANY
Information
400 G Jefferson St Ste 1n Chicago, IL 60607 United States (312) 614-6000 http://www.hillshirebrands.com

THE HILLSHIRE BRANDS COMPANY Rankings #614 in FORTUNE 1000 (June 2015)

Top 3 Competitors
HORMEL FOODS CORPORATION
BOB EVAN'S FARMS, INC.
KRAFT FOODS GROUP, INC.

Unlock more access to Hoover's!
• Build customized email lists 24/7, based on your best customer profile.
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THE HILLSHIRE BRANDS COMPANY
Company Profile

Got meat? Hillshire Brands Company (formerly Sara Lee Corp.) certainly does. Hillshire Brands is the home of the Hillshire Farm, Ball Park, Jimmy Dean, and State Fair brands of deli meats and other packaged-meat products, including hot dogs and sausages, as well as artisanal brands Adams and Gallo. For dessert, the company serves up Sara Lee's line of frozen goodies, including cheesecake. Taking its name from its predecessor's most-recognized meat brand, Hillshire Brands formed in 2012 when Sara Lee split into two publicly traded companies, the other being its European coffee-and-tea business, D.E. Master Blenders 1753. It became a unit of Tyson Foods in 2014.

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Resources—Personal Information

Personal Information

What can we learn?

- Address
- Hobbies
- Education
- Spouse, Children, Other Family

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Personal Information

What to look for:

- Internal Resources
 - Donor/Alumni Portal
 - Database
 - Checks
- External Resources
 - **Wedding Announcements**
 - **Obituaries**
 - **News Articles**
 - **Church/Synagogue Bulletins**
 - **Federal Election Commission**
 - **Bios—Company, Conference, Alumni Websites**
 - AlumniFinder
 - Wealth Screening Vendor

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Personal Information—Resources

Industrialist Robert Pritzker dies

With brothers, built Marmon Group to great wealth
gave millions to education

October 23, 2011 | By Sandra M. Jones, Wallis Wong and Kristin Samachon, [Chicago](#) Tribune reporters

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Robert Pritzker, a billionaire industrialist and one of three brothers who built the Pritzker family's [business](#) empire, died Thursday in Chicago after a long battle with Parkinson's disease. He was 87. An engineer by training, Pritzker helped shape his family's fortune as head of the Marmon Group, one of the nation's largest [private companies](#). Together with elder brother Jay Pritzker, Robert Pritzker built Marmon into a \$7-billion conglomerate after taking out a loan to buy a money-losing manufacturer of bicycles and hospital equipment in 1953.

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Camps in Jun, Jul & Aug. [Get info!](#)

While Marmon is not a household name and the Pritzkers have worked hard as a family to keep low profiles, they are recognized for their significant wealth — they are the city's richest family — and for their philanthropy. Among their enterprises, Hyatt is the most familiar name, and the family also captured headlines in recent years because of a schism that led to divisions of their fortune. In the business world, it was the deal maker who acquired undervalued companies and who recognized that hotels represented a significant investment opportunity. Robert, as operator, turned businesses around and made them profitable. In the 1960s the brothers renamed their manufacturing company Marmon Group, and it flourished into a conglomerate of dozens of companies making everything from railroad equipment to medical supplies to Hammond organs.

Jay Pritzker died in 1999. Younger brother Donald, who ran Hyatt hotels, died in 1972. Robert Pritzker stepped down from Chicago-based Marmon as CEO in 2002 after five decades at the helm. The family sold 60 percent of Marmon to Warren Buffett's Berkshire Hathaway in 2006. The deal calls for Berkshire to acquire the rest of the company in stages. Described in a rare 1988 Forbes interview as a man steeped in "pleasant rationality," Pritzker was known to downplay his wealth. He traveled economy class, wore bow ties and liked to fiddle with machine parts.

"It fascinated me how things got made — the idea that materials and people came in two boxes and something of value went out the third," Pritzker told Forbes.

Today the Pritzkers, a far-flung clan, are worth more than \$9 billion combined, ranking among the nation's wealthiest, according to Forbes magazine.

The Pritzker family is in the process of dividing its empire among 13 adult orphans, the result of a family rift. The publicity-shy family was thrust into the headlines a decade ago when Pritzker's youngest children, Lisa and Matthew, claimed a sensational lawsuit that their father, as trustee, and some family members disowned their trust funds of more than \$1 billion in the years following his divorce from their mother and directed the money into other family trusts.

An agreement to settle the dispute has resulted in the restructuring and sale of some of the family's most valuable assets. The moves included the deal to divest Marmon and sell shares of Hyatt Hotels to the public. The Pritzkers sold a majority stake in TransUnion to Chicago investment firm Madison Dearborn last year.

Robert Pritzker was the grandson of Nicholas J. Pritzker, who arrived in Chicago in 1886 at age 9 as a poor Russian immigrant. The patriarch shined shoes and sold newspapers and managed to send his three sons through law school. Robert Pritzker's father, A.N. Pritzker, started a law practice that eventually turned into a business organization.

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Personal Information—Resources

PUBLISHED JAN 4, 2017



2011 Chicagoans of the Year: Leslie Bluhm



The Matchmaker
CHICAGO CARES

When Leslie Bluhm founded Chicago Cares with her friend Mary Perchal on Earth Day of 1991, she would not have defined herself as a social entrepreneur. It was, she says, a term she had never heard before—but it is a description she now passionately embraces.

At the first Chicago Ideas Week in October, Bluhm and her husband, the real-estate investment manager David Helfand, awarded the inaugural Bluhm/Helfand Social Innovation Fellowship to five social entrepreneurs under the age of 35. Bluhm hopes the grants—\$10,000 each—will help cultivate a community in which entrepreneurs can network and share ideas. But the fellowships also commemorate a personal milestone: the 10th anniversary of Chicago Cares, the Midwestern largest volunteer service organization, which reaches out to nearly every Chicago neighborhood as it coordinates more than 200 group service projects a month.

A University of Chicago Law School graduate, former attorney, and self-described workaholic do-gooder, Bluhm cofounded the nonprofit Chicago Cares after noticing that her colleagues weren't volunteering. "I realized it wasn't because they didn't want to volunteer," she recalls. "They really had no idea where to turn. They were afraid of overcommitting, or they didn't want to do it alone."

Related



[PHOTO GALLERY](#)

MORE CHICAGOANS OF THE YEAR 2011

[Jeff Akers](#)

[Andrew Bluhm](#)

[Susan Bluhm](#)

[Catherine Lyons](#)

[Arlene Taylor](#)

PREVIOUS HIGHLIGHTS

[2010](#) | [2009](#) | [2008](#)

[2007](#) | [2006](#) | [2005](#)

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Personal Information—Resources

Kilts Center for Marketing

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Katie Claussen Bell
Associate Director

Katie Claussen Bell is associate director of the Kilts Center for Marketing. She is a high energy leader with deep experience in program and event management, research and data analysis, consultation, outreach, and marketing strategy development and execution.

Bell is a 2001 graduate of Saint Mary's College (Notre Dame, Indiana), launching her professional career at CMA, where she worked in corporate marketing and communications roles, before receiving a master of arts in sociology from Loyola University Chicago in 2005.

Bell began working for the University of Chicago in 2005. Her first position was at the Harris School of Public Policy, Cultural Policy Center, where she was a program manager and research assistant. She then moved on to Chapin Hall at the University of Chicago, a policy research center that focuses on children, families, and their communities. Here she served as associate program director and research analyst, conducting qualitative and quantitative research on areas including postsecondary education, foster care, and community development.

During her tenure at Chapin Hall, Bell also served as interim research project manager for the South Side Health and Vitality Studies project, where she managed operations, project staff, and public/government project teams while developing research proposals and managing program progress.

Bell has co-authored several papers, including "Postsecondary Educational Trajectories of Urban Youth Addressing Vulnerability and Barriers to Enrollment and Persistence" (2010), "Continuing Foster Care Beyond Age 18: How Courts Can Help" (2008), and "Trust Connections to Community: The Juvenile Reentry Experience as Characterized by Multiple Systems Involvement" (2008).

Bell lives in Chicago's Logan Square neighborhood with her husband and daughter.

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FREDERICK H WADDELL

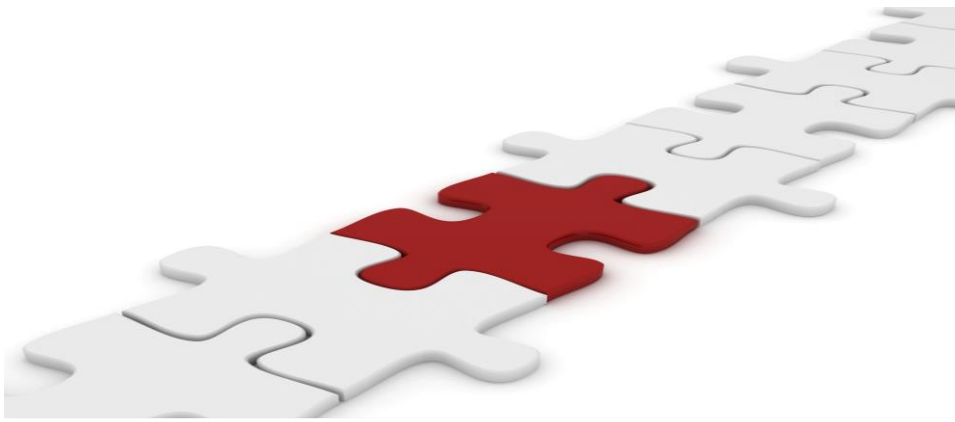
📄 📧 📞 ⚙️ 🛠️

Personal Information

Gender: M
 Birth Date: JUN-1953
 Birth Info: Not provided
 Death Date:
 Family Info: Not provided

Career Information

Occupation: bank executive
 Education: BA, DARTMOUTH COLLEGE, 1975; MBA, NORTHWESTERN UNIVERSITY, 1979; chmn., CEO, Northern Trust Corp., 2011-; chmn., pres., CEO, Northern Trust Corp., 2009-2011; pres., CEO, Northern Trust Corp., 2008-2009; pres., COO, Northern Trust Corp., 2006-2008; pres., corp. & instl. svc., Northern Trust Corp., 2003-2006; exec. v.p., wealth mgmt. group, Northern Trust Corp., 1994-2003; exec. v.p., Northern Trust Bank Calif., Northern Trust Corp., 1991-1994; v.p., Northern Trust Corp., Chgo., 1983-1989; various positions, Northern Trust Corp., Chgo., 1975-1983
 Certifications: Not Provided
 Career: Bd. dirs. Fed. Res. Bank Chgo., 2008-
 Awards: Not provided
 Memberships: Mem.; Comm. Club Chgo., Fin. Svcs. Roundtable, Exec. Club Chgo. (bd.dirs.)



Putting it All Together

Research Resources—Grid by Purpose

	Income	Real Estate	Stock	Philanthropy	Private Company Sales	Biographical	Address
LexisNexis for Dev Profs		X			X	X	X
WealthEngine		X	X	X	X	X	X
DonorSearch		X	X	X	X		X
iWave		X	X	X	X	X	X
ResearchPoint		X	X	X	X	X	X
DonorScape		X	X	X	X		X
Accurint		X					X
NOZAsearch				X			
Verigift				X			
Dataquick		X					X
Core Logic		X					X
Dun & Bradstreet					X	X	
Hoover's					X	X	
Who's Who	X					X	
zoominfo					X	X	
GuideStar	X			X			X
Foundation Directory	X			X			X
LinkedIn				X		X	
Salary Surveys	X						
Trade Journals	X			X	X	X	
Company Websites	X			X	X	X	
10K Wizard	X		X		X	X	
SEC	X		X		X	X	
FEC						X	X
Yahoo/Google/MSN Finance News Articles	X		X		X	X	

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Reference Interview

- Determine the Requestor's Goal
 - What is the question she/he is trying to answer?
 - What does she/he already know?
 - What piece of info will move her/him to the next step in the relationship with the prospect?
 - When is it needed? Where is it on his/her list of priorities?

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Consider the Purpose

When I need to:	I want to know:	Research deliverables:
Identify the Prospect	People who might support our cause. Is there a connection to our organization? Do they have capacity? How do I get in touch with them?	List of prospects who have supported similar causes. Relationships with current donors and volunteers. Baseline capacity rating. Answer a specific question. Valid contact information.
Qualify the Prospect	What area might they want to give to?	List of gifts to similar organizations, board memberships. Other known prospect interests. Answer a specific question.
Cultivate the Prospect	What else have they supported? Can anyone help us develop a stronger relationship with them? When's the right time for an ask?	List of gifts to similar organizations, board memberships. Relationships with current donors and volunteers. Alerts on wealth events. Answer a specific question. Full capacity rating.
Solicit the Prospect	How much should I ask for? Are there any red flags before I ask?	Full capacity rating. Search of news involving prospect. Answer a specific question. Full prospect profile.
Steward the Prospect	Can they connect me with anyone else? When could I put them back into the cultivation cycle?	Relationships with people of influence and other prospects. Alerts on wealth events. Answer a specific question.

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Questions?

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