

# **Making Your Database Sing!**

## How to Get the Most Out of Your Software Investments

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# Who are you?

- How many fundraisers in the audience?
- How many technical, i.e., IT or development systems staff?
- How many development assistants who haven't decided what they want to be yet?
- How many vendors or consultants?

# What Are Some of the Common Problems?



# How Can These Problems Be Prevented?



## 5 Things You Can Do (at a cost)

- Send your database out for a wealth screening; age overlay, marketing data overlay, etc.
- Send your database out for NCOA (National Change of Address) updates.
- Screen your database for email addresses.
- Rent or exchange prospect mailing lists.
- Apply zip plus four data to your database.



# Sample Screening

[Print Instruction](#)

## TARGET AMERICA™

www.tgtam.com

**Target Enterprise Summary**    [\(Help!\)](#)

Welcome

.....

[Main Menu](#)
[Detailed Query](#)
[Relationships](#)
[Ratings](#)
[Matrix](#)

Import date(s)	04/26/2005	
Total names screened: 96786	Total names matched: 19258	19.9% match rate

Select a Category
[Click here for In Depth definitions.](#)

	Category	Count	Minimum \$\$		Category	Count
<a href="#">i</a>	<a href="#">Philanthropists</a>	53		<a href="#">i</a>	<a href="#">Business Cross-Reference</a>	3,947
<a href="#">i</a>	<a href="#">Private Investors</a>	13,192	\$2,787,100,000.00	<a href="#">i</a>	<a href="#">Foundation Trustees</a>	855
<a href="#">i</a>	<a href="#">Professionals with Keoghs</a>	1,093	\$682,728,349	<a href="#">i</a>	<a href="#">Donors</a>	0
<a href="#">i</a>	<a href="#">Luxury Property Owners</a>	205		<a href="#">i</a>	<a href="#">Wealthy Not Further Classified</a>	209
<a href="#">i</a>	<a href="#">Income Producing Asset Holders</a>	6,730	\$9,362,000,000	<a href="#">i</a>	<a href="#">Whos Who Bios</a>	973
<a href="#">i</a>	<a href="#">Board Members</a>	24		<a href="#">i</a>	<a href="#">FEC Donor Data Cross Reference</a>	2,689
<a href="#">i</a>	<a href="#">Professionals</a>	1,911		<a href="#">i</a>	<a href="#">Email Available</a>	3,597
<a href="#">i</a>	<a href="#">Business Executives</a>	127		<a href="#">i</a>	<a href="#">Available Total Screened</a>	19258
<a href="#">i</a>	<a href="#">SEC Insiders</a>	1,132	\$21,971,063,528			


# Sample Detailed Query Form

<b>TARGET AMERICA™</b> <small>www.tgtam.com</small>		
<b>Target Enterprise Detailed Query Form</b> (Help!)		
Welcome <input type="text"/> from <input type="text"/>		
Click the check box next to the name then click the submit button at the bottom of the page to view the index of people in combination of categories and/or fields.		
Category	and/or	Name and Address Fields
<input type="checkbox"/> Philanthropists	<input type="text"/>	<input type="checkbox"/> First Name: <input type="text"/>
<input type="checkbox"/> Private Investors	<input type="text"/>	<input type="checkbox"/> Last Name: <input type="text"/>
<input type="checkbox"/> Professionals with Keoghs	<input type="text"/>	<input type="checkbox"/> City: <input type="text"/>
<input type="checkbox"/> Luxury Property Owners	<input type="text"/>	<input type="checkbox"/> State: <input type="text"/> Choose One
<input checked="" type="checkbox"/> Income Producing Asset Holders	AND	<input type="checkbox"/> Zip Code: <input type="text"/>
<input type="checkbox"/> Board Members	<input type="text"/>	starting zip: <input type="text"/> ending zip: <input type="text"/>
<input type="checkbox"/> Professionals	<input type="text"/>	Key Fields
<input type="checkbox"/> Business Executives	<input type="text"/>	<input type="checkbox"/> Acct ID: <input type="text"/>
<input type="checkbox"/> Donors	<input type="text"/>	<input type="checkbox"/> Last Gift Amt: <input type="text"/>
<input checked="" type="checkbox"/> Who's Who Bios	AND	<input checked="" type="checkbox"/> Last Gift Date: <input type="text"/> 20040101
<input type="checkbox"/> Wealthy Not Further Classified	<input type="text"/>	<input checked="" type="checkbox"/> Total Paid Amt: <input type="text"/> 4999.99
<input type="checkbox"/> Email Available	<input type="text"/>	<input type="checkbox"/> Total Payments: <input type="text"/>
<input type="checkbox"/> All Hard Matches	<input type="text"/>	<input type="checkbox"/> First Gift Date: <input type="text"/>
<input type="checkbox"/> Business Cross-Reference New! Sales Volume: <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Birthdate: <input type="text"/>
<input type="checkbox"/> SEC Insiders	<input type="text"/>	<input type="checkbox"/> Key Field 8: <input type="text"/>
<input type="checkbox"/> Foundation Trustees New! Level: <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Key Field 9: <input type="text"/>
<input type="checkbox"/> Business Relationship Reports	<input type="text"/>	<input type="checkbox"/> Key Field 10: <input type="text"/>
		Change keyfield labels
		Donor Fields
		<input type="checkbox"/> Donor Field 1: <input type="text"/>
		<input type="checkbox"/> Donor Field 2: <input type="text"/>
		<input type="checkbox"/> Donor Field 3: <input type="text"/>
		<input type="checkbox"/> Donor Field 4: <input type="text"/>

<input type="checkbox"/> SEC Relationship Reports	<input type="text"/>	<input type="checkbox"/> Donor Field 5: <input type="text"/>
<input type="checkbox"/> Foundation Relationship Reports	<input type="text"/>	<input type="checkbox"/> Donor Field 6: <input type="text"/>
<input checked="" type="checkbox"/> AE Rating	AND	<input type="checkbox"/> Donor Field 7: <input type="text"/>
<input type="checkbox"/> AG Rating	<input type="text"/>	<input type="checkbox"/> Donor Field 8: <input type="text"/>
<input type="checkbox"/> BE Rating	<input type="text"/>	<input type="checkbox"/> Donor Field 9: <input type="text"/>
<input type="checkbox"/> BG Rating	<input type="text"/>	Change donor field labels
<input type="checkbox"/> CE Rating	<input type="text"/>	
<input type="checkbox"/> CG Rating	<input type="text"/>	
<input type="checkbox"/> DE Rating	<input type="text"/>	
<input type="checkbox"/> DG Rating	<input type="text"/>	
<input type="checkbox"/> DO Rating	<input type="text"/>	
<input type="checkbox"/> FEC	<input type="text"/>	

Demographics		
Category	and/or	Category
<input type="checkbox"/> Age: Choose One	<input type="text"/>	<input type="checkbox"/> Contributes to Environmental Causes
<input type="checkbox"/> Investable Assets: Choose One	<input type="text"/>	<input type="checkbox"/> Contributes to Humanitarian Causes
<input type="checkbox"/> Type Person: Choose One	<input type="text"/>	<input type="checkbox"/> Contributes to Health Causes
<input type="checkbox"/> Subcategory of Person: Choose One	<input type="text"/>	<input type="checkbox"/> Contributes to Liberal Causes
<input type="checkbox"/> Children at Home	<input type="text"/>	<input type="checkbox"/> Contributes to Conservative Causes
<input type="checkbox"/> Liberal / Conservative: Choose One	<input type="text"/>	<input type="checkbox"/> Contributes to General Causes
<input type="checkbox"/> Contributes to Cultural Causes	<input type="text"/>	<input type="checkbox"/> Contributes to Religious Causes


[Click here to go to Target America Research Assistant](#)



# Sample Detailed Query Report

<a href="#">Print</a>	
 Return to Detailed Query Form	
	<h2>Target Enterprise Detailed Query Report</h2>





There are 4 matching records  
Displaying index of prospects 1 through 4.

**Click on "Name" to access the profile.**

**Click on highlighted column name to sort by that column.**

[Click here to get this index in text format to copy and paste into your application.](#) (Help!)


[Click here to get this index in an Excel file format to download.](#)

	<b>Name</b> - This is the name provided to Target Enterprise by the client	<b>Address</b> - This is the address provided to Target Enterprise from the client.	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Rating</b>
1.	[REDACTED]	 <b>Burgess Road</b>	Heathcote	NY	10583	AE
2.	[REDACTED]	655 Park Avenue, 	New York	NY	10021	AE
3.	[REDACTED]	165 W End Ave, 	New York	NY	10023	AE
4.	[REDACTED]	 Weed Street	New Canaan	CT	06840	AE



# Sample Tara Report

Report prepared on : 06/22/2005      Electronic file id: [REDACTED]



## The Tara Report

A personal research instrument produced by Target America, Inc.      Database Version: 0

Hi, I'm Tara! I've brought together all the information we've found on your prospect, resources for developing a successful fundraising strategy, integrated a moves management program so you can keep your activities and be notified when follow-up is pending. In addition to the facts, which I'll keep updated you, I've included explanations, definitions, and other information to help you understand how I gathered the data and assembled this report. Be sure to click on underlined links for additional help and explanation.

### INFORMATION FOR SCREENING THAT YOU PROVIDED

**You gave us...**  
DAVID  
HEATHCOTE, NY 10583

**We match this individual to...**  
David  
[REDACTED]

**Summary Research:**  
This prospect has the following research data. Just click on any link to go directly to the detail.

**Target America Detail Info**

**Political Contribution Information**

**Marquis Who's Who Info**

**Additional Resources**

**Notes and Next Actions**

**User defined information**

Acct ID: [REDACTED]  
Last Gift Amt: 2500.00  
Last Gift Date: 20050114  
Total Paid Amt: 9165.00  
Total Payments: 10  
First Gift Date: 19941229

To search the Internet for more information on either person above, just click on the name to launch.

### THIS IS HOW I COMPILED THIS REPORT.

**SPECIAL POINTS OF INTEREST:**

- Total known assets compiled at the home address are \$2,250,000
- This is an Affluent person

**I matched your prospect at the household level using the sources below.**

- ☐ Philanthropist that I researched.
- ☒ A private investor that provided me portfolio information.
- ☐ A professional with a private pension plan that was reported to the IRS.
- ☒ Experian/Axiom Income Producing Asset Holders.
- ☐ Experian Luxury Property Owners.
- ☐ Government and private sources for wealthy individuals. Such as the FAA, coast guard and professional organizations.
- ☒ Marquis Who's Who.

**I also did two other types of searching**

The first is the distance from the address provided to a business or foundation. The second is the exact zipcode and name for political contributions. This is what I found.

- ☐ A business executive from DI and other business license filings.
- ☐ An SEC Insider Trader from t SEC.
- ☐ A Foundation Executive/Trustee from the IRS 990 filings.
- ☒ A political donor reported to the Federal Election Commission.

**TARA TIP** Just click on any of the highlighted sources for a more

detailed explanation of the source

### My overall summary assessment...

In my analysis, I always try to give an assessment of the lifetime giving potential of the prospect. In doing this I use the known assets reported at the home address for the household. Based on these assets, the age of the individual and other variables, I calculate that over the course of this individual's lifetime, he or she is capable of charitable donations, including bequests, totaling **\$900,000**

### RATING SCALES WE USE.

**This individual has the following rating.** (For a full definition, click on the rating.)

AE

Other rating definitions can be viewed by clicking on any of the ratings below:

AE AG  
BE BG  
CE CG  
DE DG  
DO

**The letter E (for "Exact") in a rating indicates that an individual was rated at the home address. Exact matches must have at least the same last name and the same address including the zip code. The information reported on the profile is for the "matched to" individual (the one that appears on our database).**

**The letter G (for "geographic") means the individual was rated at a business or foundation address. Geographic matches have the input individual's first name, middle initial (if available), and last name within a 25-mile radius of the home address.**

**Thus, individuals rated at home addresses are rated AE-DE; those rated at business/foundation addresses receive ratings of AG-DG. We have a special rating: healthcare clients when they match their patient files to the Enterprise data base. We customize the DB and add their donors. When a patient matches as a donor, but do not match to the DB in any other way, we rate them a DO and the donor data appear in this report.**

**In all cases, individuals are assigned the highest rating they qualify for, whether it is based on the home or business/foundation.**

### WEALTH CLASSIFICATION

Target America also classifies by wealth, according to assets reported at the home address in the public record. **Ultra-Affluent** and **Affluent** individuals are in the top 1 percent of asset holders in the United States; **Wealthy** individuals are in the top 5 percent.

**This is an Affluent person**

### TARGET AMERICA, INC DETAIL INFORMATION

**PRIVATE INVESTOR:** These are individuals that have active investment portfolios. minimum value of an active portfolio that we track is \$100,000. Most portfolios are considerably higher and range from \$100,000 to \$1M+. The primary source for this data is the self reported investment data provided by investors in response to survey. Investment product offerings and requests for information. H

\$250K - 500K Investor

Income Producing Asset Holder

Their income producing assets amount: \$2,000,000+

### MARQUIS WHO'S WHO INFORMATION

## POLITICAL CONTRIBUTIONS INFORMATION

### FEC recorded contributions:

All political gifts over \$250 must be reported to the Federal Election Commission (FEC). FEC inclusion is internal research purposes only and the Licensee agrees to comply with all FEC regulations pertaining to the use of this data.

Contributor	Address	Committee	Date	
[REDACTED]	Scarsdale, NY 10583	DNC SERVICES CORPORATION/DEMOCRATIC NATIONAL COMMITTEE	09/2004	\$2
[REDACTED]	Scarsdale, NY 10583	AMERICA COMING TOGETHER	09/2004	\$
[REDACTED]	SCARSDALE, NY 10583	DEMOCRATIC SENATORIAL CAMPAIGN COMMITTEE	09/2004	\$
[REDACTED]	Scarsdale, NY 10583	KERRY-EDWARDS 2004 INC. GENERAL ELECTION LEGAL AND ACCOUNTING COMPLIANCE FUND	08/2004	\$2
[REDACTED]	SCARSDALE, NY 10583	FRIENDS OF HILLARY	07/2004	\$2
[REDACTED]	Scarsdale, NY 10583	JOHN KERRY FOR PRESIDENT INC	07/2004	\$2
[REDACTED]	Scarsdale Park, NY 10583	AMERICANS FOR RESPONSIBLE LEADERSHIP	05/2004	\$2
[REDACTED]	Scarsdale, NY 10583	DAVID SCOTT FOR CONGRESS	05/2004	\$
MR. [REDACTED]	Scarsdale, NY 10583	INDIANA DEMOCRATIC CONGRESSIONAL VICTORY COMMITTEE	02/2004	\$5
[REDACTED]	Scarsdale, NY 10583	JOHN KERRY FOR PRESIDENT INC	02/2004	\$1
[REDACTED]	Scarsdale, NY 10583	JOHN KERRY FOR PRESIDENT INC	01/2004	\$1
[REDACTED]	Scarsdale, NY	CLARK FOR PRESIDENT INC	09/2003	\$2

# 5 Things You Can Do

(that won't cost you a penny)

- Query your database using zip and zip plus four data to your greatest advantage. What basic donors are living in the same buildings as your major donors? These are ideal upgrade prospects.
- Query your database for frequent givers; long-time givers; older givers and look at their patterns of giving and giving history.
- Find new sources of data on your constituents within the company, e.g., another department collecting data for a program or project.
- Meet with your department heads to find out what you can do to share information between your departments more effectively and efficiently. Start with your current standard reports – what can you do to change them to make everyone's job easier.
- Make sure that you are collecting all the information you can about what you send your prospects and donors.

# Goodies

(links collected from friends and colleagues)

- American City Business Journals <http://www.bizjournals.com/>
- Anybirthday <http://www.anybirthday.com>
- Anywho <http://www.anywho.com/>
- CBS Marketwatch <http://www.marketwatch.com>
- Ceoexpress <http://www.ceoexpress.com>
- Council of Community Services NYS <http://www.ccsnys.org>
- Crains NY <http://www.newyorkbusiness.com/>
- FEC Info <http://www.fecinfo.com/>
- Foundation Center <http://www.fdncenter.org/>
- Forbes <http://www.forbes.com>
- Guidestar <http://www.guidestar.org/>
- Highbeam <http://www.highbeam.com>
- Hoovers <http://www.hoovers.com>
- InfoSpace <http://www.infospace.com/>
- Martindale Lawyer Locator [www.martindale.com/xp/Martindale/home.xml](http://www.martindale.com/xp/Martindale/home.xml)
- NETROnline (property value-county assessors) [http://www.netronline.com/public\\_records.htm](http://www.netronline.com/public_records.htm)
- Networking Info <http://networking2.zoominfo.com/PeopleSearch/>
- Peoplesmith (name and address standardization software) <http://www.peoplesmith.com/>
- Princeton University (Development Research Links) <http://www.princeton.edu/qiving/devres/netlinks.html>
- Yahoo! Real Estate <http://realestate.yahoo.com/>
- SEC (Securities Exchange Commission) <http://www.sec.gov/>
- Skype (Internet Phone Calls) <http://www.skype.com/>
- SurveyMonkey <http://www.surveymonkey.com>
- Superpages <http://www.superpages.com>
- University of Virginia (Prospect Research Links) <http://indorgs.virginia.edu/portico/>
- USPS (Zip code and street finder) <http://www.usps.com>

Disclaimer: This list is not to be construed as an endorsement of these vendors and services.  
It is provided for information only.



# Summary

- Budget yearly for technology: hardware and software upgrades; re-training for current staff; training for new staff and staff to support your system.
- Sweat Equity: Figure at least 75%-80% effort for 20-25% result.
- When launching new initiatives, involve your technology staff from the very early, planning stages.
- Treat your internal staff (within and outside) of your department as if they were your prospects and donors and you will be rewarded in kind.



# A Community Garden

Think of your database like a community garden – a garden does not water, weed or plant itself.

You have to do it!

And everyone is responsible  
for their plot of land....but oh, what  
tomatoes, I mean donors and prospects  
you can grow...

# Contact Info

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