

A photograph of a desk with a laptop, a magnifying glass, a pen, and sticky notes. The text is overlaid on this image.

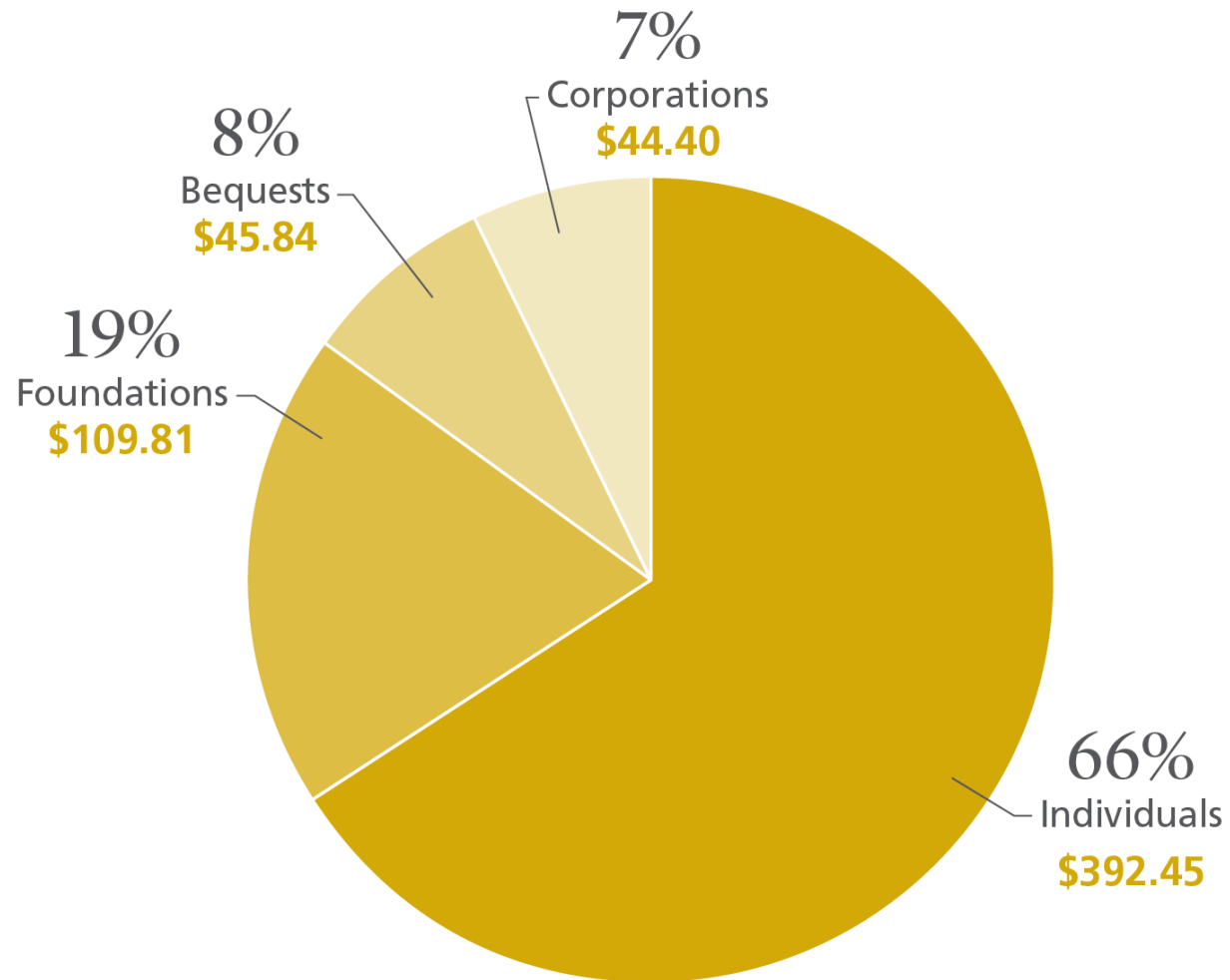
Prospect Research for Small Shops

Brad Cecil, CFRE, President & CEO
Vickie Mathews, CFRE, Senior Vice President

Brad Cecil &
ASSOCIATES

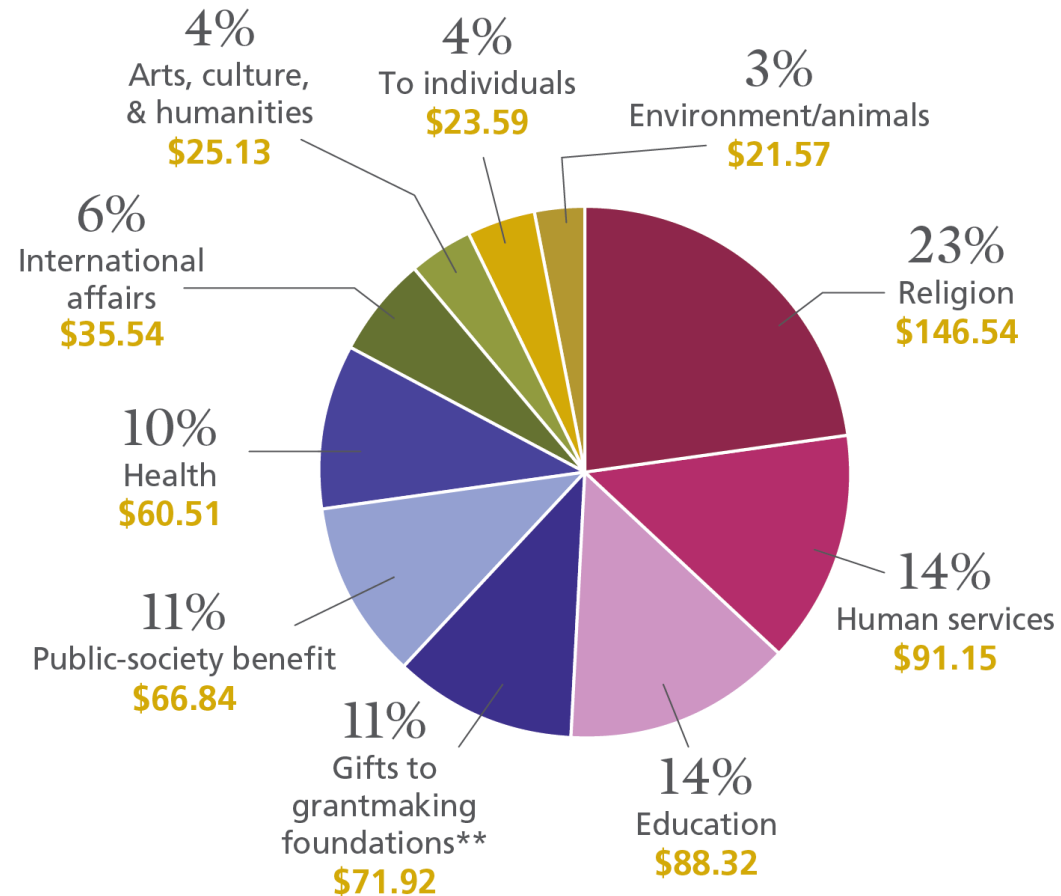
2024 contributions: \$592.50 billion by source of contributions

(in billions for dollars – all figures are rounded)



2024 contributions: \$592.50 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)



* Total includes unallocated giving, defined as the difference between giving by source and recipient categories. Unallocated giving totaled -\$38.60 billion in 2024.

** Estimates developed by Indiana University Lilly Family School of Philanthropy using data provided by Candid.



Q4 2025 Report Topline Metrics

DONORS

-3.6%

(+/- 0.5%)

YOY change

DOLLARS

+5.0%

(+/- 0.5%)

YOY change

RETENTION

+0.2

(+/- 0.19 p.p.)

YOY change

Why research?

- Sets up a thoughtful conversation
- Helps define ability, affinity and access
- Narrows priorities for limited staff time
- Can help tailor messaging, including outreach, talking points, proposal and storytelling

Where to begin

- 990s, donor lists, annual reports, chambers of commerce, property records, current contacts (staff, board, volunteers, donors, stakeholders, partners)
- LinkedIn
- Candid/GuideStar (profiles)
- ProPublica (giving patterns)
- Foundation Directory Online free access through local libraries
- News alerts and local publications
- Search engine search tips
- AI (a tool, not a solution)

What to Focus On

- Consider everything through the lens of “does this connect to our mission?”
- Type:
 - Individual
 - Foundation
 - Corporate
 - Organization
- Outline key identifiers for prospective donors:
 - Interest in your work
 - Fund in your geographic area
 - Fund peer organizations

Individual Donor Profiles

WHO: Current residents invested in the community; former residents who maintain connection to their hometown; alumni

WHY: Greatest opportunity to explore genuine motivations; more flexible decision-making

HOW: Subscription services; annual reports; property records; current contacts; local publications

FOCUS:

- Basic bio (employment and education)
- Giving history
- Volunteer/Board engagement
- Family/Peer network
- Wealth indicators:
 - Multiple properties
 - Business ownership
 - Stock holdings

Handout: Individual Donor Research Profile Template

Foundation Profiles

WHO: Private and family foundations are professional funders who exist to support their mission through charitable gifts to nonprofit organizations whose mission aligns with theirs

WHY: Required to give away 5% of their asset base every year to maintain their nonprofit status

HOW: Subscription services, 990s, donor listings

FOCUS:

- Areas of interest and funding priorities
- Asset base
- Geographic area funded
- Giving range
- Trustees and staff

Handout: Foundation Research Profile Template

Corporate Profiles

WHO: Companies (large, small, private, public, etc) based in or with vested interest in your community and mission

WHY: Many companies want to invest where their employees “live, work and play”; often multiple ways to give (corporate, foundation, marketing \$\$\$; matching contributions; volunteer time); in-kind donation opportunities

HOW: Subscription services, local chamber of commerce, economic development groups, local officials, corporate website and annual report

FOCUS:

- Industry, mission and client base
- Geographic footprint
- Market share in your service area
- Community engagement/foundation priorities

Handout: Corporate Research Profile Template

Organization Profile

WHO: Civic organizations, fraternal organizations, municipalities, faith-based organizations, social organizations, Community Development Entities (NMTC), venture capital

WHY: Can provide access to larger opportunities at higher levels of an organization with their endorsement

HOW: local community networking and awareness

FOCUS:

- Mission/work
- Role in community
- Budget
- Funding/collaborative opportunities

Handout: Organization Research Profile Template

How to implement

- Example: use research to find connector
- Example: use research to tailor outreach
- Example: use research to tailor talking points/discovery conversation
- Example: use research to tailor formal proposal

Example: Email Outreach

Dear NAME,

(warm intro from sender)

As ██████ launches into its second century of service to our community, they've set ambitious goals that center around a 2030 strategic plan and major fundraising initiative. We have had some great success as donors and foundations come to realize how effective ██████ is at changing the lives of individuals in our community who face barriers to employment by helping them build skills, find jobs, and reach their life goals. In particular, we have come to realize that ██████ can reach many, many more clients if we expand our retail footprint thereby enabling an increase in services to this community.

The ██████ Foundation has made such a tremendous impact on our community through partnerships with so many nonprofits – I'd love to get your guidance on a thoughtful approach to the Foundation. ██████ and I would enjoy an opportunity to explore how the Foundation's priorities align with ██████'s mission. Are you available for a meeting in the coming weeks? I realize summer is a hectic time for many, we're happy to meet at a time and place that's most convenient for your schedule.

Looking forward to hearing from you.

Example: Proposal

Requested Support

Because of H-E-B's commitment to help every community you serve, especially in the areas of hunger and disaster relief, [REDACTED] **respectfully requests that H-E-B consider a \$250,000 gift**, which can be made over a multi-year period, to support [REDACTED] capital campaign.

Because of H-E-B's growing presence in the North Texas market, naming opportunities in [REDACTED]'s highly accessible new facility will advance H-E-B's brand awareness in this community. [REDACTED] is pleased to present the following naming opportunities for consideration:

Resources

- [iWave/Kindsight](#)
- [DonorSearch](#)
- [Foundation Directory](#)
- [Grant Station](#)
- [Impala](#)
- [Instrumentl](#)
- [Zeffy](#)

Thank you!

vmathews@cecilcommunication.com

cecilcommunication.com

Brad Cecil &
ASSOCIATES