Below are a few points that highlight the proposed services for the members of the **Greater Philadelphia Alliance:**

Option #1: Premium 5,000 Database Review with ProspectView Online for 12 Months
Listed Rate: $4,000
GPCA Discounted Rate: $3,250

- Strategic Review of **5,000** records, returned with DS Scores, Likelihood Ratings, Total Charitable and Political Giving, RFM Ratings and Real Estate Value.
- Full detailed review of top **1,000** records screened, returned with Detailed Profiles via "My Portfolio".
- Manual assessment of top **100** records screened
- Unlimited use of ProspectView Plus Online with one login includes: Gift Search, Prospect Generator, Integrated Search, My Portfolio and Customer Settings

Option #2: Advanced 500 Database Review with ProspectView Online for 12 Months
Listed Rate: $ 3,200
GPCA Discounted Rate: $2,700

- Strategic Review of **500** records, returned with DS Scores, Likelihood Ratings, Total Charitable and Political Giving, RFM Ratings and Real Estate Value.
- Full detailed review of top **100** records screened, returned with Detailed Profiles via "My Portfolio".
- Manual assessment of top **25** records screened
- Unlimited use of ProspectView Plus Online with one login includes: Gift Search, Prospect Generator, Integrated Search, My Portfolio and Customer Settings

Below are a few points that highlight the proposed services for the members of the **Greater Philadelphia Alliance:**

Option #3: API Set Up within Client's Donor Management Software
GPCA Discount Rate: $1,000

- Application Programming Interface (API) Set Up
- Unlimited use of Integrated Search

DonorSearch Partners with available API:
  - ❖ Agilon
  - ❖ Bloomerang
  - ❖ DonorPro/Salsa Labs
  - ❖ Little Green Light
  - ❖ MatchMarker
  - ❖ Neon
  - ❖ Patriot
  - ❖ Result's Plus
  - ❖ SalesForce
  - ❖ Sustain
  - ❖ Tessitura

Option #4: Master Account with Unlimited Use Prospect View Online
Listed Rate: $3,600 (Additional $500 Per SubUser)
GPCA Discount Rate: $3,000 (Additional $500 Per SubUser)

- Unlimited use of ProspectView Plus Online with one Master Account login includes: Gift Search, Prospect Generator, Integrated Search, My Portfolio, Customer Settings and Account Setting for creating SubUser.
- Master Account creates the SubUser Accounts
  - ➢ Providing SubUser Credentials to ProspectView Online
  - ➢ Ability to assign Portfolio's, lists and prospects, Batch Screening to SubUser's

What's Included?

All DonorSearch Options:
- Support with database integration.
- Ability to query and sort screening results based on multiple data sets, including: ratings, state, giving capacity, wealth capacity, real estate, customized user fields, giving categories, and more.
- Donors' charitable gifts to other nonprofits will be sorted and organized by the nonprofit description type. Graphical representations are presented in detailed profiles.
- RFM or relationship score for each prospect.
- Analytics and rankings are included for each prospect including an annual gift score and major gift score.
- Editable and detailed profiles are included with the option for user customization.
- Capacity estimates based on giving and wealth components are included for each prospect.
- Free unlimited customer support.
- Free unlimited training via webinars.
- Free training/reference manuals.

ProspectView Batch Screening:
- My Portfolio totals report with one-click detailed profiles for all records.
- In-depth philanthropy and wealth analytics to identify propensity and capacity to give.
- Secure delivery of results via My Portfolio.

ProspectView Online:
- Unlimited access to DonorSearch's online tools – My Portfolio, Integrated Search, Gift Search, Prospect Generator, and Wealth Search.
- Unlimited wealth, affiliation, and philanthropy searches and profile building.
- Unlimited searches and data export over 12 months.

Why Choose DonorSearch?

We Start with Proven Philanthropy

DonorSearch is the only prospect research company that starts with proven philanthropy to provide more accurate, more comprehensive, and more actionable data to help nonprofits of all types achieve better fundraising and outreach results. Our research has shown that past giving to nonprofits is a much better indicator of future giving than wealth alone.

We Manually Verify Data

We are the only company that has in-house prospect researchers to manually verify top prospects. The process makes sure that screening results are as accurate as possible, saving valuable time for the development office staff to get to the next major gift.

We Provide Excellent Customer Service

Every DonorSearch client has access to our customer service team at no additional cost. Our Client Support experts train each new client individually using the client's own data. Our Advanced Training sessions can help you perform in-depth analysis of your donor and prospect pool, and show you which philanthropic and wealth indicators highlight your major gift prospects.

We Care

Unlike other companies in the industry, DonorSearch is in business for one reason: to help your nonprofit achieve its mission. We are passionate about improving your fundraising efforts so that your organization can grow.

The DonorSearch Process

Step One:
DonorSearch analyzes your internal data on your prospects' previous giving. By evaluating the relationships with each of your potential prospects, DonorSearch can measure and compare the strongest predictors of future giving.

Step Two:
DonorSearch will screen your records against comprehensive philanthropic databases. By screening for philanthropy first, you will no longer have to guess or assume which prospects are most inclined to give. The difference between DonorSearch and other companies is our philosophy that philanthropists make the best prospects. As obvious as that may seem, other prospect research companies look for wealth first, overlooking many strong prospects.

Step Three:
After searching for philanthropy, DonorSearch will conduct a wealth screening, highlighting capacity and asset information. The dual philanthropic and wealth screening method is one of the most effective ways to learn about the potential major gift prospects in your database.

Step Four:
For quality assurance, DonorSearch performs an Assessment Process before data goes to a client. The Assessment Process helps eliminate the extra time your staff would spend with returned screening results. Our in-house prospect researchers spend hours manually verifying your file. The results: computer screening alone typically results in 70% accuracy; our assessment process results in 90-95% accuracy, the highest in the industry.

Step Five:
DonorSearch then employs sophisticated analytics to provide modeling on all donors, including an annual fund likelihood, major gift likelihood, and planned gift likelihood score. These scores are derived from the provided giving information and external giving information. Prospects are ranked by both propensity and capacity to give.

DonorSearch Databases

DonorSearch uses 30 databases to pull information from both philanthropic and wealth data sources to provide the most complete profile on each prospect. Choosing DonorSearch allows you to access public information as well as proprietary giving information on each of your prospective donors. All records submitted to DonorSearch are screened through each of these databases:

Philanthropic Databases

1. DonorSearch's Annual Report philanthropy database
The second largest collection of charitable giving data available anywhere, this proprietary database is growing by 100,000+ records per day. It includes hard-to-find print references and Internet-based annual reports harvested from nonprofit websites. This comprehensive collection spans 17 years, with millions of records from the mid to late 1990's, even better coverage for each year of the previous decade, and one of the fastest growing collections for 2010-2014. This database provides giving information that was previously published on the Internet but is no longer available, as well as the broadest collection of printed documents not available elsewhere.

2. GuideStar Foundation Trustees
This database is a list of the foundation trustees and board members for approximately 50,000 personal, family, and corporate foundations, and is one of the single best markers of future philanthropy. Trustee information includes name, title, year reported, corpus and more

3. Prospect Researcher
A manually-compiled databases of charitable giving records. One source made in the northeast corridor, principally the Philadelphia area in the late 1990's and early 2000's. The second half of this data was collected from printed annual reports, donor recognition documents, and performance programs. We include this database because it provides users with charitable giving information that is not available from any Internet-based sources. And in most cases, the gift information is verified from two sources.

4. DonorSeries Directors Report
DonorSeries Directors Report, also known as Waltman's, provides thousands of entries for individuals and their primary affiliation with corporate boards of public firms, foundation boards, and major nonprofit boards from arts, social services, education and health organizations, as well as civic boards.

5. FEC Political Giving Database
Lists every political contribution of $200 or more over the past 25+ years for federal campaigns, approximately 14 million records. During evaluation of the prospect inclination and capacity to give, the presence of Federal Election Commission regulatory records can be one of the most powerful predictors of an individual's future charity. Most records also include individuals' occupations or employers. The database is updated monthly.

DonorSearch Databases

Wealth Databases

6. DonorSeries Charitable Donations Database
DonorSeries Charitable Donations Database, also known as Waltman's, has over 5 million records collected from printed annual reports, event programs, and other published sources. Many records of donor histories are tracked over the last 10 years. Some records may even include individuals' college graduation years.

7. Reuters Market Guide Insider Profiles Market Guide
In-depth information on over 10,000 public U.S. companies. It also collects and summarizes additional information from proxy statements for SEC insiders on individual sectors or industries of the U.S. economy from regulatory filings and corporate annual reports.

8. LexisNexis Real Estate Property Records
One of the leading national compilers of real estate and property, with information on over 120 million properties across the United States, including assessment and tax information, as well as neighborhood real estate demographics.

9. Marquis Who's Who Biographies
A compilation of information from more than 15 directories, including Who's Who in America®, with concise biographies of over 900,000 leaders and achievers from around the world from every significant field of endeavor.

10. GuideStar Nonprofit Boards of Directors
The national database of U.S. charitable organizations, with data on more than 850,000 IRS-recognized nonprofit organizations. GuideStar accesses the IRS Form 990 filed by organizations which reports on the operations and finances of charities.

11. Dun & Bradstreet (D&B) Business & Executive Information
Duns Marketing Identifier (DMI) files of business records with contact names, titles, D&B Executive at Home Address Records, and D&B Biographical Records. With 14 million records, this is one of the largest and most well-known sources of information about privately-held businesses and their executives.

12. Securities and Exchange Commission Data
SEC insider trader transactions (1986 to present) and current holdings for stocks, options, and other derivatives as reported on Forms 3, 4 and 5. The information is collected to comply with the regulatory requirements of the Securities and Exchange Commission (SEC). Individuals who are generally the policy makers of a publicly traded company must provide information to the SEC whenever they make a stock transaction. Specifics include detailed stock and options transactions.

DonorSearch Databases

Wealth Databases

13. FAA Aircraft Owners
Profiles all owners and partial owners of aircraft licensed in the U.S., including a description of the aircraft, a list of all owners, and the address of the managing owner. While aircraft ownership is often viewed as an outward sign of wealth or disposable income, statistically aircraft owners are less generous than people who are not. The file contains information about private and commercial aircraft, including air balloons.

14. Larkspur SEP/Keogh Pensions
Information on deferred income of self-employed individuals and over 2.5 million qualified pension plans.

15. IRS 527 Political Donors
This is an often overlooked source of giving information. Most known for the role they played in the recent presidential elections, 527 organizations can collect contributions of any size. New data is available quarterly.

16. IRS 527 Directors
IRS 527 Directors are often political activists in their community who organize and operate the 527 organizations. The IRS 527 directors are the principal contact persons for learning more about the organization and its finances. This database is updated monthly.

17. U.S. Coast Guard
A file of all vessels, whether individually or corporately owned, including a summary of the vessel's highlights. Boat ownership can be viewed as an outward sign of wealth or disposable income, but statistically boat owners are less generous than people who do not own boats. The file contains information about recreation and commercial boats and vessels.

18. Zillow
Zillow is regarded as the most accurate source for fair market value of real estate, and DonorSearch is the only company to include it in profiles. This source is ideal for properties in states with fractional assessments. Inside of profiles, DonorSearch provides the property value trend, a map to provide context, and a link to an adjustable aerial view. Many properties include street level photos.

19. FAA Airmen
This is the official name of the file published by the Federal Aviation Administration, although it includes the names of all certified pilots, regardless of gender. Files include the name, home city, state, and zip, and the approved certifications of each individual, whether the address is domestic or foreign.

DonorSearch Databases

Wealth Databases

20. IRS 7806 Exempt Organizations
The definitive list of nonprofits and foundations currently certified as tax exempt. The files are updated monthly to quarterly.

21. IRS 990PF Profiles
A complete list of 100,000+ grant-giving foundations, including assets under management, organization title, and contact information.

22. CorpTech Business Profiles
Corporate Technology Information Services, Inc. (CorpTech) provides detailed information on over 95,000 private technology company executives.

23. Who Knows Who
Who Knows Who lists the names of thousands of corporate board members, foundation board members and nonprofit board members when an organization is referenced in a profile. This is an invaluable guide on relationships your board members or donors may have with other potential prospects.

24. RW Athletes Database
A list of professional athletes from many of the premier professional sports leagues. Information includes birthplace, age, team, position, and salary for athletes from MLB, NFL, NHL, NBA, the PGA Tour, the LPGA Tour, ATP, WTA and the Sprint Cup NASCAR Series. Compiled from various sources, it is one of the most diverse collections of data on, athletes available.

25. Zip-codes.com
Zip-codes.com provides access to U.S. Census data, and gives DonorSearch the ability to provide an ranking of prospects based on average income and average home value in the prospect's community.

DonorSearch Databases

Links and Images

26. Google Intelligent Links
One-click keyword searches are available in profiles for donor recognition name matches and the recipient nonprofit, D&B executive matches and the associated company, FEC donor matches and the associated employer, and Market Guide executive matches and the associated employer.

27. Annual Report Document Library
DonorSearch's proprietary annual report database includes tens of thousands of links to current, historical, and out-of-print electronic and paper annual reports and donor recognition documents. This database also provides full text of annual reports and access to photos, original gift listings, and board information.

28. FEC Source Images
Our FEC data includes one-click access to millions of campaign contribution forms. On these forms you can see how the campaign listed the gift, including the donor's name, employer, and street address at the time of the donation.

29. SEC Source Images
Our SEC data includes one-click access to millions of Securities and Exchange Commission electronic filings. This data includes easy access to narratives and explanations, indirect holding descriptions and connections, and live links to company information.

30. Million Dollar Donors
A manually assembled file that consists of 65,000+ million dollar donors collected from a variety of publically available resources – press releases, annual report, articles, funding reports and more. Data spans 15 years and is updated regularly.