

# DEVELOPMENT RESEARCH

## HOW CAN WE HELP?

### RESEARCH PROFILES & PRODUCTS

Provides reactive research products aligned to plan stage, including Prequalifications, Advanced and Comprehensive Profiles, Financial Briefs, Event Bios, Foundation Summaries, Corporate Profiles, Updates, and other custom research requests.

### DUE DILIGENCE

Conducts negative news and background screening on boards, individuals, and companies being considered for board service or significant gift opportunities to ensure alignment with University values.

### WEALTH RATINGS AND SCREENINGS

Screens prospects using wealth indicators and Research Estimated Giving Capacity (REGC) to support qualification, portfolio strategy, and prioritization of fundraising efforts. Also provide full screenings with presentation for SCUDS.

### PROSPECTING LISTS

Proactively identifies individuals, companies, and foundations that align with University needs and priorities through targeted prospecting lists segmented by wealth scores and other key data points, including past philanthropic giving, real estate value, and additional wealth indicators.

### PROSPECT REFERRALS

Proactively identify and refer new or rediscovered prospects through the GAIL Referral Tracking System to replenish qualification pools and support fundraising area needs.

### RELATIONSHIP MAPPING

Leverages paid research resources, GAIL data, and publicly available information to identify and visualize connections between prospects, donors, and key influencers, supporting relationship-based fundraising strategy and prospect engagement. This can be visualized as an Excel sheet or Word Doc.

### RPM MEETINGS

Quarterly portfolio conversations with Prospect Management and Research. The Research team aligns research strategy to plan stages—Qualification, Cultivation, Solicitation, and Stewardship—ensuring the right research product supports the next fundraising action.

### COLLABORATION AND STRATEGY

Leverages paid research resources, GAIL data, and publicly available information to identify and visualize connections between prospects, donors, and key influencers, supporting relationship-based fundraising strategy and prospect engagement.

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