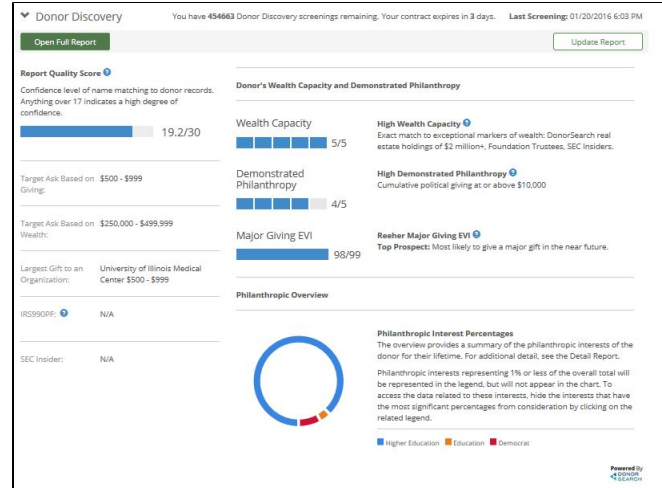


# Donor Discovery

**Donor Discovery™** is a Fundraiser Performance Management best practice module, powered by wealth and philanthropy profile screening from DonorSearch, and is fully integrated within Fundraiser Performance Management. Donor Discovery provides immediate, on-demand access to detailed wealth screenings so front-line fundraisers can have current and reliable data as they prepare to meet with a prospect or prepare a proposal. By providing the right information at the right time, Donor Discovery helps gift officers create more informed prospect strategies, yielding greater proposal success.

With the additional data from Donor Discovery, gift officers and prospect researchers are able to supplement a prospect's profile with measurements and detailed examples of their overall demonstrated philanthropy and wealth capacity. The Donor Discovery data enables your team to gain new insight into donors and prospects, further cultivate individual relationships, and develop a tailored strategy for moving the prospect forward to the proposal stage.



## Functionality Based on User Seats

For Donor Discovery subscribers, the functionality available to users is based on seats. Depending on your subscription, you will receive a set number of Researcher seats and/or a set number of Officer seats.

### Researcher Seat

- Run batch screenings via Control Panel or Targeter queries
- Can also create and submit small batches based on Targeter queries of unique groups like new parents or special event attendees
- Can request immediate, on-demand screenings of constituents via the Relationship Profile.

### Officer Seat

- Can request immediate, on-demand screenings for constituents who have never been screened via the Relationship Profile.
- Can request immediate, on-demand update of information for constituents who have previously been screened via the Relationship Profile.
- Users have a set number of screenings per month as defined in the subscription. Remaining screening for the user can be seen on any Relationship Profile in the Donor Discover section. Any unused screening are NOT carried over to the next month.

**All Fundraiser Performance Management users** (including those who are not assigned a Donor Discovery seat listed above) will be able to see all summary-level screening and detail report data in the Relationship Profile. All users with rights to Targeter will be able to run queries using Donor Discovery filters and columns.

## Constituent Screening

Donor Discovery subscribers can screen constituents in two different ways, either "On-Demand" for a single constituent on the Relationship Profile or via large "Batch" in Targeter.

### On-Demand Screening

Those users with Officer Seats or Researcher Seats will have access to run On-Demand screening via the Relationship Profile. This can be done for constituents who have never been screened or to update data on those previously screened. On-Demand screening results should be returned within seconds. If no match is found or if the Quality Score is less than 12, the results will not be returned and the screening will not count against that user's total available screen.

## Batch Screening

Available to users with Researcher Seats, the batch screening allows users to run large screening via Control Panel or Targeter queries. Batch screenings will be returned within 24 hours of being submitted. That user will receive an email once the screening is complete and available in the Platform. If no match is found or if the Quality Score is less than 12, the results will not be returned for that constituent and the screening will not count against the institution's total available screenings.

---

## Relationship Profile

**Donor Discovery** is integrated within the Relationship Profile of Fundraiser Performance Management. Subscribers to Donor Discovery are able to request on-demand access to detailed wealth screenings so front-line fundraisers can have current and reliable data prior to a first meeting with a prospect, or while preparing a proposal. Just click the **Run Screen** to request a brand new screening or click **Update Report** to get an updated screening on a constituent that had previously been run. To learn more about the Donor Discovery report data, go [here](#).

---

## Targeter

### Filters and Columns

As part of the subscription, all users will be able to search on data that has been provided as part of the Donor Discovery screenings. Filters and columns are available under the Donor Discovery category in the filter/selection window. Hover over the name of the filter or column to view the help text for that item. Note that when using the Donor Discovery filters, only those constituents who have already been screened will be returned in the search.

### Run Donor Discovery

For those with Researcher Seats, the Run Donor Discovery button allows the user to submit the Targeter query results in a batch upload for screening. Batch screenings will be returned within 24 hours of being submitted. That user will receive an email once the screening is complete and available in the Platform.

---