

ResearchPoint™
Advanced Prospect Research Solutions

Target Analytics®

Target Analytics®

blackbaud®

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About Blackbaud

Serving the nonprofit and education sectors for 30 years, Blackbaud (NASDAQ: BLKB) combines technology and expertise to help organizations achieve their missions. Blackbaud works with more than 28,000 customers in over 60 countries that support higher education, healthcare, human services, arts and culture, faith, the environment, independent K–12 education, animal welfare and other charitable causes. The company offers a full spectrum of cloud-based and on-premise software solutions and related services for organizations of all sizes including: fundraising, eMarketing, advocacy, constituent relationship management (CRM), financial management, payment services, analytics and vertical-specific solutions. Using Blackbaud technology, these organizations raise more than \$100 billion each year. Recognized as a top company by *Forbes*, *InformationWeek*, and *Software Magazine* and honored by Best Places to Work, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, the Netherlands and the United Kingdom. For more information, visit www.blackbaud.com.

ResearchPoint™ Services Overview

In today's information-rich world, fundraisers need complete and accurate data, delivered quickly and easily, to correctly identify the highest value donors and prospects.

Summary

ResearchPoint combines the industry's best, most comprehensive individual wealth and philanthropic insights under one umbrella, providing customers with an easy-to-navigate platform and custom user experience to build a successful fundraising roadmap. Seamlessly integrate constituent data, navigate deeper into each individual's capacity and inclination to give, and access custom-built modeling solutions to identify your best prospects and most likely supporters. From beginning to end, ResearchPoint leverages the best prospect data available to drive results and to help grow your mission.

Description

Easily import existing constituent data directly into the ResearchPoint database to begin building your prospect list. Append new prospects with access to the NOZA database, Target Analytics pre-matched prospecting database of over 120 million searchable gifts — find individuals by contact information, geographic location, total wealth, real estate and business property, and philanthropic giving. Customers also have the flexibility to build custom research lists to organize and segment individuals prior to evaluation. ResearchPoint boasts the most comprehensive wealth and philanthropic insights, which enable customers to identify their next-best supporters by uncovering each individual's wealth, capacity, hard asset information, likelihood scores and ratings, philanthropic connections, and extended network of affiliates who share similar interests.

With built-in dashboards to analyze results and profile reporting to highlight major gift candidates, prospect researching has never been this efficient. ResearchPoint takes the time and effort of prospect researching away from the organization so you can focus on what really matters — engaging and cultivating with top-tier prospects.



Organize and segment constituents using custom research lists



Screen for wealth and philanthropic insights to identify best prospects



Analyze results for improved prospecting and fundraising strategies

ResearchPoint™ Data Dashboard

The main page of a profile shows the key information upfront and tools to navigate further through a prospect's research. Summary of wealth, income, assets, and giving history are prominently displayed to quickly review a constituent's summary. Users can confirm or reject any information directly from the main screen to further hone the information returned and to make sure an accurate constituent picture is captured. Fields can be moved and filtered to fit the needs of individual users.

The Summary screen shows information such as:

- Asset and income information
- Real Estate holdings and value
- Modeling scores and list references
- Business ownership and public company holdings
- Historical political donations
- Past philanthropic gifts
- Summary of modeling and screening results
- Biographical and contact information

ResearchPoint™ Welcome, [User]

Home | Prospects | Analysis | Administration | Workflow

Lookup ID: 8-10000325

JOHN M. SAMPLE
123 Any Street
WASHINGTON, DC 20001
johnsample@gmail.com

Wealth Summary (Screened: 7/1/2015)

Assets	Total identified	Confirmed	Other indicators	Total identified	Confirmed
Real estate:	\$4,551,838	\$4,551,838	Wealth indicators:	0	0
Businesses:	\$0	\$0	Biographical data: NEW	2	1
Securities:	\$1,000,000		Political donations:	1	0
Income/compensation:	\$200,000		Philanthropic gifts:	6	3
Other assets:			Nonprofit affiliations:	0	0
Total assets:	\$5,751,838	\$4,551,838	Foundation affiliations:	0	0

Giving capacity (System) Confirm and lock Edit

Capacity formula: WCF - 1
Estimated wealth: \$2,500,001 - \$5,000,000 (\$4,551,838)
Major giving capacity: \$100,001 - \$250,000 (\$227,591)
Overall rating: [Bar chart]

Asset distribution for JOHN M. SAMPLE
4 and above

Giving summary (Screened: 7/1/2015)

Giving type	Total identified	Confirmed
Giving to my organization:	2	0
Philanthropic gifts:	6	3
Political donations:	1	0

Philanthropic giving category breakdown
1 and above

20%	Higher Education	2
20%	Hospital, Health Center	2
10%	Advocacy, Social Action, Civil...	1
10%	Human Services - Children, Fam...	1
10%	K-12 Education	1
30%	Additional Categories	3

Philanthropic gifts (6) Total identified: \$200 Total confirmed: \$200

Name	Range (low)	Range (high)	Organization	Gift y...	Confidence	Category
John ...	\$100.00	\$499.00	INOVA Health System Foundation	2012	5	Hospital, Health Center
John S...	\$0.00	\$99.00	Alpha Kappa Psi	2003	5	Higher Education

Confirm | Reject | Clear status | Edit | Delete

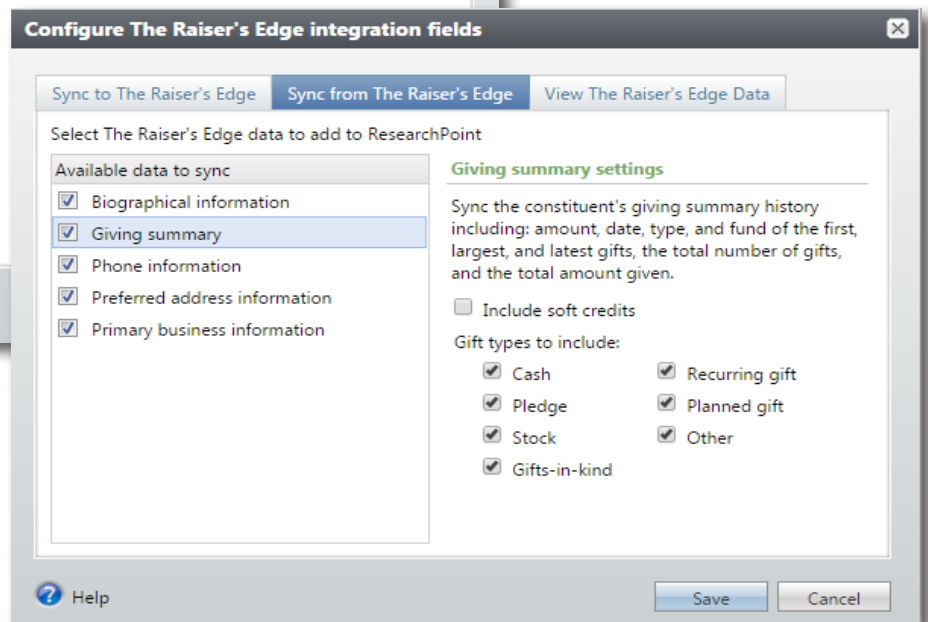
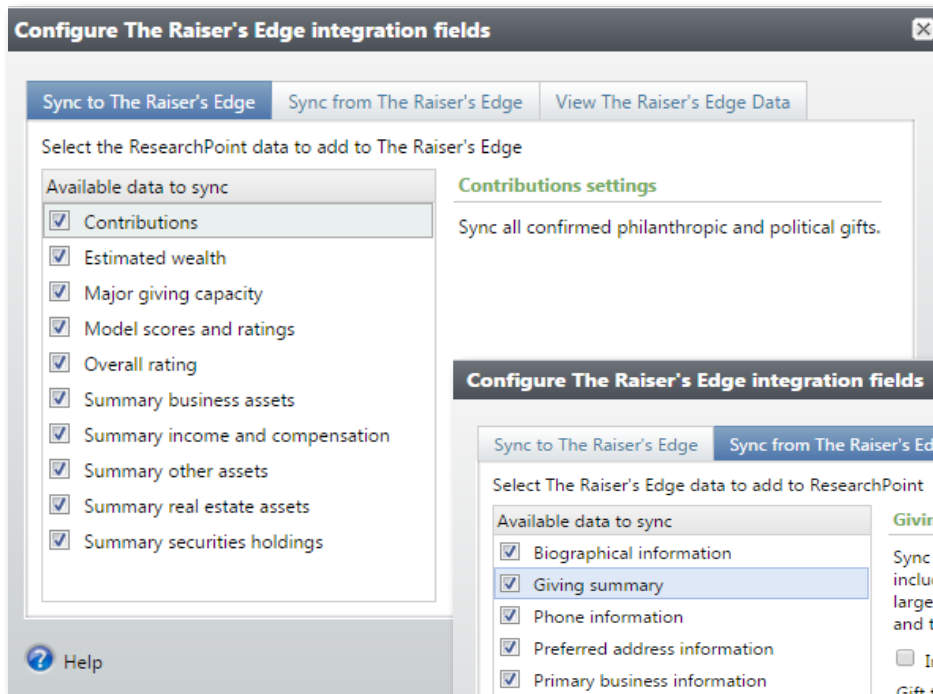
ResearchPoint™ Integration With The Raisers Edge®

ResearchPoint integrates directly with the Raiser's Edge to aid in managing constituent profiles across databases. Fields are fully customizable and automatically sync to ensure relevant and accurate information is displayed through either system. Import contact and relationship information from your database to help drive deeper prospect research and further search results. Integrate past giving history to your organization along with findings from other organizations to create more accurate pictures.

In addition to direct integration, ResearchPoint also includes import and export applications to aid in syncing to other databases and reporting tools. Using an open-sourced O-Data connection, researchers can create queries in ResearchPoint and export reports directly into reporting software such as Microsoft® Excel®. ResearchPoint also includes full support to import and screen batch searches to help sort through larger datasets in addition to single one-off searches.

I have been using Blackbaud products since the early 1990s but ResearchPoint integrated with Raiser's Edge is the best product. The support team is always responsive and very helpful.

— Letty Shearer, Prospect Development Analyst,
Lynchburg College, VA



ResearchPoint™ Plans Starter

The Starter package is ideal for organizations who have limited staff resources, and even less time to spend on prospect research. Starter is the out-of-the-box solution that allows users up to 500 individual screens to quickly identify best prospects along with access to Target Analytics' full prospecting database to search for and add individual records to their new or existing database. Research lists help organize and segment prospect files into custom research groups for wealth and philanthropic screening — uncovering each individual's capacity, inclination, and affinity to give to your organization. The extended network feature allows you to gain access to your prospect's inner circle of friends and affiliates who share common characteristics to expand your fundraising reach.

<i>ResearchPoint Starter</i>
• 500 Individual Screens
• Custom Research Lists
• Unlimited Concurrent Users
• Extended Network Features

<i>ResearchPoint Essentials</i>
• Unlimited Individual Screens
• 2,500 Group Screens
• Unlimited Concurrent Users
• Custom Research Lists
• Advanced Giving Matching
• Extended Network Features

Essentials

Whether you're getting geared up for an annual or capital campaign, our Essentials package delivers deeper prospect insights and more advanced prospecting features. With unlimited individual screens and up to 2,500 group screens, customers can search for wealth and giving information on multiple constituents at a time — increasing efficiency and driving productivity. Expand your search criteria within the Target Analytics' prospecting database to look up individuals by confirmed wealth, real estate, and business property, and financial securities. This package was put together with the prospect researcher in mind, adding in advanced giving matching to confidently identify philanthropic behaviors and interests among your organization's best prospects.

Professional

The Professional package is your organization's complete access to the best prospecting research tools available in the nonprofit market. Sophisticated research departments turn to Professional for its unlimited individual screening capability as well as up to 7,500 group screens for building the absolute best-targeted prospect list. With 10 user roles available and varying access levels depending on work functions, researchers dive further into prospecting for precise campaign targeting. Understanding the complexity of larger operations, you have the ability to manage the flow of data between the research team and development officers by assigning and tracking records using the prospect research request feature. Development officers can search requests or review entire lists right at their fingertips.

<i>ResearchPoint Professional</i>
• Unlimited Individual Screens
• 7,500 Group Screens
• Custom Research Lists
• Unlimited Concurrent Users
• Advanced Giving Matching
• Extended Network Features
• Prospect Research Requests
• Advanced Search Capabilities

Powerful Data to Drive Powerful Insights

Expanded Giving Data Sourced Directly from Blackbaud

- **NOZA Philanthropy Data:** The world's largest searchable database of public charitable donations containing over **120,000,000 philanthropic gifts**, and searchable 990-PF data on charitable organizations from the IRS

Additional Data Sources

CoreLogic

- Real estate valuation estimates
- Deed, Parcel and Mortgage: Identify properties owned / debt
- Updates are supplied quarterly



Dun & Bradstreet

- Management Biographies: Company executive descriptive information
- Executive at Home File: Key executive at company and home address
- Ticker Symbol: Stock symbol and company name cross reference
- U.S. Business Marketing File: Company demographics, executive titles, and ownership
- Updates are supplied quarterly



Guidestar

- Private/Family Foundations: To identify nonprofit organizations
- Directors and Officers of Nonprofit Organizations: Leadership identification
- Connects over 26 million nonprofit connections
- Updates are supplied quarterly



Larkspur: Indicators of wealth including pilots, boat owners, investors, socialites, etc.

- Updates are supplied yearly



Marquis Who's Who

- Marquis Who's Who: Self-reported data from over 1.28 million industry leaders across the US
- Updates are provided quarterly



Thomson Reuters

- Market Guide Profiles: Stock insider compensation and stock options
- Insider Wealth Summary: Stockholding information on corporate officers/directors
- Insider Stock Transactions: Information on stock transactions
- Updates are provided monthly



Experian

- ConsumerView: Demographic and socio-economic indicators
- BehaviorBank: Detailed insights into consumer behavior and lifestyle choices
- Experian Summarized Credit: Comprehensive credit data from national credit file
- Updates are provided quarterly



Federal Election Commission

- Listing of election and political campaign contributions from the IRS
- Collection of over 24 million political contributions
- Updates are provided weekly





Target Analytics®

About Target Analytics

Target Analytics, a Blackbaud company, delivers data-driven, collaborative solutions to help not-for-profit organizations increase support from their supporters and further their missions.

Target Analytics offers the only comprehensive analytics solution for donor acquisition and cultivation, prospect research, and collaborative peer benchmarking, as well as access to exclusive data and fundraising expertise, to maximize fundraising results at every stage of the donor lifecycle.

For More Information

To learn more about ResearchPoint to improve your prospecting efforts and to request a free demonstration, contact your Target Analytics account representative, or email TAsolutions@blackbaud.com today.