

Peer Review Example

For Board, Staff and Volunteer Prospect Review

Asking peers to answer these questions while you wait provides a structured activity that gives you immediate leads. You provide the prospect names and basic contact information and the “peers” are gently encouraged to help connect you. Providing a giving range generates a much better response rate than asking peers to identify a possible gift amount on their own. This document is just an example and you should modify and create a form that best suits your needs.

Prospect	Does this person have children?*	Do you know this person?	Would you introduce us to this person?	Can we use your name when calling?	Possible single-gift range
Patty Prospect President Performing Pavers Group Tucson AZ Home: Tucson AZ					\$1,000 - \$10,000 \$11,000 - \$25,000 \$26,000 - \$100,000 \$101,000 - \$500,000 \$501,000 - \$1million +
Patrick Prospect CEO Sizzling Season Resorts Naples FL Home: Naples FL					\$1,000 - \$10,000 \$11,000 - \$25,000 \$26,000 - \$100,000 \$101,000 - \$500,000 \$501,000 - \$1million +

*This question - Does the prospect have children? – helps us identify planned giving prospects. Research has demonstrated that having no children (or grandchildren) is the single best indicator for a planned giving prospect. (Volunteering and regular, annual gifts of \$500+ are the next best indicators.) There is no data aggregator that sells information on whether or not a person has children so asking peers is one of the best ways of answering the question.

About Aspire Research Group

Headquartered in Tampa Bay Florida, we believe every development office should have the benefits of professional prospect research. Aspire Research Group helps you raise more money by guiding you through prospect screenings, providing profiles on people, companies and foundations and giving you advice and action on using prospect research throughout the development program to boost giving.

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