



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



# She Doesn't Even Go Here!

Researching Outside of the Lines

**EXPLORE**  
PD25  
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# Agenda

- Introductions
- Non-natural constituencies
- Research methodologies
  - Quantitative research techniques
  - Qualitative research techniques
- Case studies
- Questions

# About Us

Andrea Dowd

Prospect Research and  
Management Associate,  
Walker Art Center

Based in  
Minneapolis/St. Paul



Sarah Price

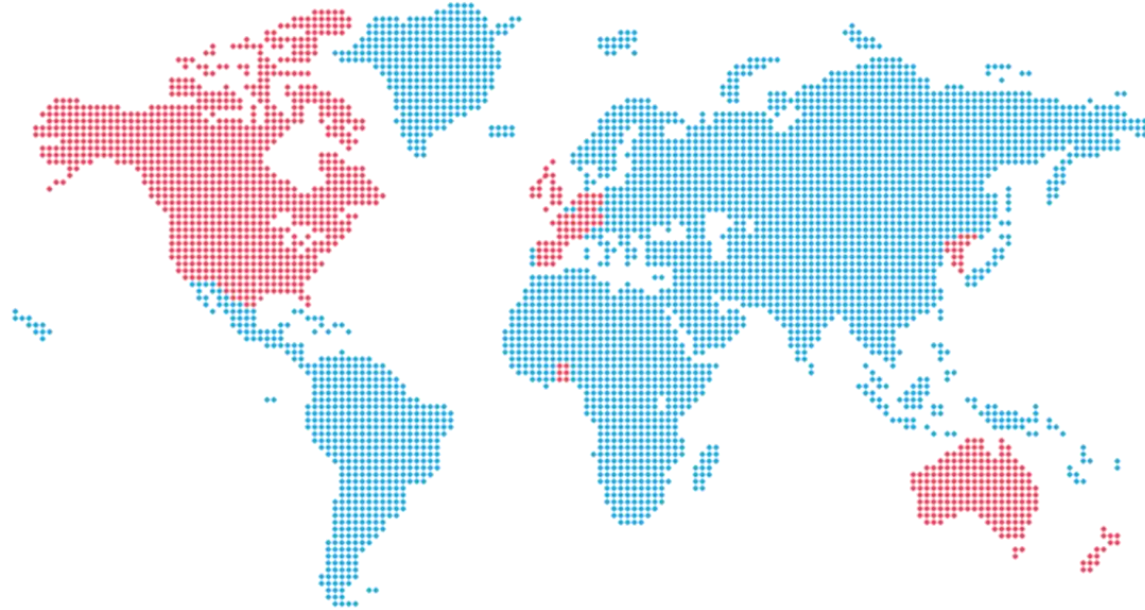
Managing Director,  
Research Services  
BWF

Based in  
Minneapolis/St. Paul



Prospect development since  
2008, fundraising since 2002

# BWF, Bloomington



~250

Clients Annually

Advised

350+ Campaigns

Established in

1983

100+

Team Members



# Walker Art Center, Minneapolis



The Development and Membership Team is made up of 15 people doing 15 unique jobs.

- None of the gift officers (including the leaders) are 100% fundraising.
- All portfolios and duties are radically different and have different project responsibilities.
- The Development part of the team has only become a formal fundraising arm in the past three years.

The Walker is a multi-disciplinary arts organization that covers modern and contemporary visual arts, performing arts, moving image, design, and education. Some iteration of the Walker has been around since 1927.

Arts funding for the Walker is a mix of memberships, sponsorships, traditional major gift fundraising, planned gift fundraising, art discipline-only fundraising, special exhibition only fundraising, special project only fundraising, requesting loans of artwork (not fundraising), and special artist-only fundraising.

# Non-Natural Constituencies



# Non-Natural Constituency Definition



Any organization or project that does not have a built-in base (alumni, grateful patients, membership) or traditional ties to the institution.



# The Challenge



# The Opportunity

The limit does not exist!

Figure 19: Percentage of Voluntary Support by Source at Types of Institutions, 2023

Type of Institution	Number Reporting	Alumni	Nonalumni Individuals	Corporations	Donor-Advised Funds	Foundations	Other Organizations	All Sources Combined
<b>Multiple Campuses</b>								
Public	15	22.1	13.2	17.6	5.8	30.5	10.9	100.0
<b>Research/Doctoral</b>								
Private	90	20.3	13.5	10.1	16.0	31.9	8.2	100.0
Public	143	21.6	15.3	17.2	8.8	27.2	9.9	100.0
<b>Master's</b>								
Private	74	33.2	21.1	9.9	8.1	21.3	6.5	100.0
Public	86	22.1	23.7	20.6	6.5	17.9	9.2	100.0
<b>Baccalaureate</b>								
Private	112	41.0	15.1	3.5	13.3	23.8	3.3	100.0
Public	27	48.7	17.5	7.5	11.9	11.4	3.0	100.0
<b>Specialized</b>								
Private	14	8.6	25.2	13.6	6.8	31.1	14.7	100.0
Public	17	3.5	14.2	6.8	11.1	57.6	6.8	100.0
<b>Associate's</b>								
Private	0							
Public	65	5.3	24.9	24.3	5.9	25.9	13.7	100.0
<b>Total All Institutions</b>	<b>643</b>	<b>21.8</b>	<b>14.6</b>	<b>12.9</b>	<b>11.9</b>	<b>30.1</b>	<b>8.7</b>	<b>100.0</b>



# Research Methodologies

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# Reference Interview

## Guidelines of the Successful Reference Interview from American Library Association

The five main areas of the reference interview are:

1. Approachability
2. Interest
3. Listening/Inquiring
4. Searching
5. Follow Up

Andrea's more intense version...

# Project Preview Parlay

- **Context.** What is the need and what is it for?
- **Who?** Who will be using or viewing this data?
- **Timeline.** What is the date this information is needed by (including review time)?
- **What data?** Share the data points you will always include in reports/lists (names, ID numbers, lifetime giving, constituency codes) and get the data points they need—don't feel bad for needing to push back on this!
- **What next?** Ask how they intend to use the data, if it needs to go back into a database, or if it will be used in a mailing.
- Prep the report/list–formatting, removing unnecessary data. Note your own observations for the email/meeting.
- If the data needs to go into the database, determine a timeline to get that information in and confirm that with your requester.
- Are there follow-up needs like portfolio assignment, finding contact information for prospects, or providing bios or profiles?
- Set a time to review the requestor's thoughts about the data and how it was used.



# Research Methodologies



Quantitative



Qualitative

# Quantitative—Internal Prospecting



1. Wealth screening data.
2. Keyword queries within notes and actions.
3. Philanthropic interests.

# Quantitative—External Prospecting



1. Research databases.
2. Old school annual reports.
3. News alerts.



# Research Methodologies—Qualitative



BOARD OF DIRECTORS



# Case Studies

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# Project Request—Native/Indigenous Artist Funders

- **Request.** Indigenous artist, Dyani White Hawk, will be exhibiting with the Walker in Fall 2025 and additional funding to support this exhibition is needed. We can't use any corporate funders that have predatory or shady practices, natural resource extractions, particularly oil and gas related, defense related investing, or other practices that harm the environment or marginalized people. We are working with a Canadian arts institution that is also seeking special funding that can't overlap with ours.
  - **Special Issues.** Walker history, rising profile of artist, museum collaboration, and artist's specific funding concerns.
- **Approach**
  - Gathered more information about exhibition and the artist's concerns/desires.
  - Compiled a list of local and national funders focused on Native/Indigenous arts support.
  - Reviewed list with requester to assess if more prospects were needed. Gathered additional contact information if needed and assigned prospects as requested.



# Project Request—Native/Indigenous Artist Funders

*Continued*

- **Non-Database Research Sources**

- Researched local tribal websites and tribal corporate company sites for aligned interest in supporting Native and Indigenous artists with grants.
- Reviewed past Native and Indigenous artist exhibitions' web pages at Minnesota-based and national arts organizations—art lender and financial supporters are often listed.
- Reviewed recent industry and national articles about Native and Indigenous collectors, collections, and artists.

- **Internal Research**

- Gift officers reviewed internal prospects who were known collectors of Indigenous art.
- Corporate gift officers reviewed current corporate donors who may be interested in exhibition support.

# Project Request—Design-Focused Funders

- **Request.** Compile a list of companies, organizations, and individuals financially supporting design nationally and internationally for a new Design Triennial program.
  - **Special Issues.** The Design Triennial is a brand-new initiative with no shared clear conceptualization at the time of request. Open-ended timeline, no set amount of prospect requested, broad definition of design, and small list of suggested funders from guest curator.
- **Approach**
  - Gathered additional information about the curator's list, what types of design to focus on.
  - Reviewed curator list and hit a research wall.
  - Asked for an additional meeting with requester to brainstorm other design-focused areas to pursue.
  - Branched out search and compiled lists based on individual and sponsorship prospects.
  - Held final meeting with requester to review list and to agree on a stopping point.

# Project Request—Design-Focused Funders

- **Non-Database Research Sources**
  - Researched curator's list of suggested funders which only included a small number of design companies in the U.S. and internationally.
  - Reviewed those companies to see who sponsored or funded their work or design-focused events.
  - Reviewed annual fund reports of design schools and museums for individual funders of a certain threshold. Reviewed design-focused event pages for funder/sponsor details.
- **Stopping Point**
  - The request became unwieldy because of the lack of information about what the Design Triennial is going to be, what the funding needs actually are, and that “design” can mean many things. Without additional structure, the research was not going to provide what will eventually be needed to fund this initiative.

# Case Study





# Prospect Identification Methodology



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## MEMORANDUM

**To:** Friends at XYZ Organization  
**From:** Sarah Price, BWF  
**Date:** April 16, 2025  
**Subject:** Prospect Identification Methodology

Based on initial scoping conversations with the XYZ Organization team and materials review, BWF recommends the following methodology for prospect identification.

### Philanthropic Interest Methodology

BWF knows that past giving is a strong predictor of future giving so has narrowed the search to those who are philanthropic. After discussions with the XYZ Organization, we used a major gift threshold of \$250,000 as the starting point.

Qualifications	iWave results (individuals)
Minimum Gift Amount \$250,000	276,858
Gift Year of 2015 or newer	

### Philanthropic Categories

To further target prospects, BWF identified individuals who support causes that align with the mission of XYZ Organization and its current initiatives. BWF and the XYZ Organization arrived at the inclusion of the following philanthropic categories and sub-categories within iWave that most closely match the affinity areas identified with the client.

#### Skills-First Hiring

- Community and Economic Development
  - Business and Industry
  - Economic Development
    - Employment
- Education

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# Using AI for Prospect ID and Research

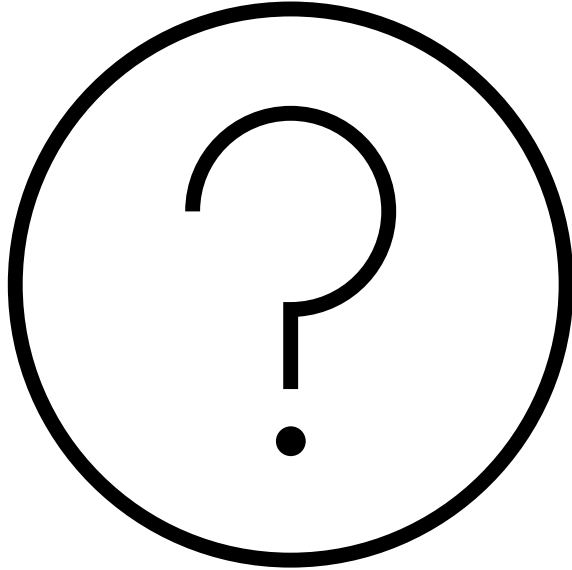
Can you help me identify 25 new donor prospects for the Friends of Hennepin County Libraries?

Absolutely! Could you please share a bit more about the ideal donor profile for Friends of Hennepin County Libraries? For example:

1. Are you looking for individual, corporate, or foundation donors?
2. What giving capacity or range are you targeting?
3. Are there any specific interests or causes that align with your library programs (e.g. literacy, early childhood education, technology access, DEI, etc.)?
4. Should the prospects be based in Minnesota or is a broader geographic scope okay?
5. Would you like me to prioritize donors who have supported similar library or cultural organizations?

This will help me identify the most aligned and strategic prospects for you.

# QUESTIONS?



# Thank You!!

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# THANK YOU!

**Please complete your session evaluations in the mobile app.**

