

This information should only be used for XXX staff and senior volunteers and not for further distribution; it should be treated in accordance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018 and stored and destroyed in line with XXX policies. Notes are accurate to the best of our knowledge based on information from published sources (see endnotes).

## **Research Profile on:**

### **[Name, ID, Style of Address]**

Items to include in a profile are dependent on the purpose for which you are processing the data and conducting the research. Take into account a data minimisation approach and where the prospect is in the pipeline and what they are aware of in terms of seeing your privacy notice. Some of the topics you might wish to include are as follows:

### **Executive Summary and Recommendations**

- Summary of Relationship:
- Researcher Recommendations:
- Potential:
- Privacy Status: have they seen a privacy notice?

### **Biographic Details:**

You can provide an overview or break it down as follows, but remember why you are providing this information and whether it is relevant to the purpose:

- Location(s):
- Personal Interests:
- Education:
- Awards & Honours:

### **Career Summary:**

You can provide an overview or break it down as follows, but remember why you are providing this information and whether it is relevant to the purpose:

- Current roles
- Previous roles
- Include link to public bio

## **Philanthropic Involvement**

You can provide an overview or break it down as follows, but remember why you are providing this information and whether it is relevant to the purpose:

- Philanthropic Interests and Motivations Summary:
- Family Charitable Trusts/Giving Vehicles:
- Charitable Roles (current):
- Charitable Roles (former):
- Other Affiliations:
- Known Major Gifts:
- Other giving:

## **Financial Information**

You can provide an overview or break it down as follows, but remember why you are providing this information and whether it is relevant to the purpose:

- Summary of financial history
- Source of wealth
- Likely source of donation
- Giving capacity and propensity

## **Networks and Connections**

- Sphere of Influence summary: industries, geographic areas, personal networks
- Any overlap with pipeline.
- Social Media profile, reach and tone.
- Highlight the top 5 -10 key networks - usually a separate template and remember you are processing more personal data here of other data subjects who may not have seen a privacy notice – have you undertaken a Legitimate Interest Assessment?

## **Risk Flags**

You can provide an overview or break it down as follows, but remember why you are providing this information and whether it is relevant to the purpose. Due Diligence often requires its own template:

- High risk industries
- Legal
- Reputational

## **Document Audit:**

Research Completed by:

Date completed: Click or tap to enter a date.

Date Last Updated: Click or tap to enter a date.

## **Endnotes for sources:**