



**This is an example of a full prospect profile. Although the amount of information will vary for each prospect, each section of this sample is completed to show style and format.**

**Prospect Name:** William “Will” B. Donate ’57 (graduating class year if available)

**Education:** Philomath University 1957, B.S. Engineering, *summa cum laude*, Stanford University 1961 MBA

**Development Staff:** Susan Rourke

**Rating:** 1 (\$1 million or more over a five-year period)

### **Personal Background**

**Home Address (include seasonal addresses):**

1412 Regal Court  
Regal, OR 97777

**Home Phone:** (541) 555-9299

**Vacation Home:**

16 Oceanview Terrace  
Oceanview, OR 98888

**Vacation Home Phone:** (503) 555-1612

**Spouse Information (include spouse employment/title/compensation):**

May B. (Bookbinder) Donate (b. 4/4/1935), married 1961. May graduated in 1960 from Harper’s College in Cranston, WA with a B.S. in Chemistry.

May’s maiden name is Bookbinder. Her family owns the internationally-known Bookbinders book store chain. May sits on the board of Bookbinders. Bookbinders has more than 1,200 stores around the world. Headquartered in Wilmot, NH, Bookbinders is a publicly held Fortune 500 company with annual sales of \$3.9 billion. Their stock trades on the New York Stock Exchange under the symbol BPG. The company has more than 32,000 employees worldwide.

**Children:**

William B. Donate, Jr. (b. 1/3/1963), Philomath University 1984, B.A. William is owner of the privately-held Transgo Industries (Annual sales 2016: \$14 million, 50 employees). William is married to Wendy Morgan-Donate and they have two children.



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**Children (continued...):**

Sheila (Donate) Plenty (b. 6/1/1965), Stanford University 1987, B.S. Sheila is owner of Green Hills Nursery in Sweet Home, OR. (Annual sales 2016: \$3 million, 20 employees.) Sheila is married to Andy Plenty, who manages Sweet Home Insurance, Inc. (Annual sales 2016: \$1.5 million, 3 employees.) They have three children (Rudy, Phyllis, Andy, Jr.). Sheila is Chapter President of Soroptimists International.

**Clubs:** Toastmasters, Rotary, Lions

**Interests:** Golf, speedboat racing, scuba-diving, classic cars, philanthropy

**Career Profile**

**Title:** Chairman

**Business Address:**

Cogswell Engineering, Inc.  
2020 Plenty Street  
Regal, OR 97777  
Phone: (541) 555-2121  
Email: [wdonate@cogs.com](mailto:wdonate@cogs.com)

Established in 1958, Cogswell Engineering, Inc. is the world's leading producer of pre-engineered metal building systems and architectural products for the nonresidential construction market – and largest source of related development and construction services. The company is traded on the New York Stock Exchange under the ticker symbol CSE. 2016 Sales: \$1.3 billion; 2,070 employees.

**Career Summary (Biography):**

Will Donate was born on 2/28/1935 in Topeka, KS to Justin and Betty Donate. Justin Donate moved the family to Oregon in 1937 and took a job with the Oregon State Dept. of Transportation. Will Donate graduated from Philomath University in 1957 with a B.S. in Engineering. He played football under famed Coach Henry Hegeman and as quarterback led the team to two bowl appearances (1956 and 1957). Donate founded Cogswell Engineering in 1958.

**Corporate Boards:** Cogswell Engineering, Spacely Sprockets, Port Industries

**Personal Wealth/Finances**

**Estimated Net Worth:** In excess of \$3 billion.



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**Direct Stock:** Owns 1,443,000 direct shares of Cogswell Engineering (NYSE: BPG) valued at \$72 per share as of 2/1/2017 for a total value of \$103,096,000. 200-day average is \$64 per share for a total value of \$92,352,000.

**Indirect Stock:** Owns 22,000 indirect shares of Cogswell Engineering (NYSE: BPG) valued at \$72 per share as of 2/1/2017 for a total value of \$1,584,000. 200-day average is \$64 per share for a total value of \$1,408,000.

**Annual Compensation:** 2016 \$4.3 million plus \$1.2 million bonus. Within the last year, Donate has exercised options valued at \$350,000.

**Other Assets (real estate, automobiles, boats, etc...):**

The Donates own a home in Regal, OR with a current market value of \$950,000. Their vacation home in Oceanview, OR has a current market value of \$1.6 million.

Donate's car collection includes a Ferrari 360 Modena 6 valued at approximately \$104,000, an Aston Martin Vanquish valued at approximated \$151,000 and a 1932 Duesenberg valued at approximately \$42,000.

Donate owns a 35 ft. Sonic Speedboat valued at approximately \$125,000.

Although Spacely Engineering maintains a fleet of planes, Donate personally owns a Sabreliner 60 Business Jet valued at approximately \$249,000.

**Foundation:**

Donate Family Foundation, established in 1972 in Regal, Oregon.

Giving primarily in central Oregon for higher education, healthcare, arts, and religion.

Financial Data (as of 10/30/2015):

Assets Amount:	\$17,000,000
Total Giving:	\$ 2,000,000
Minimum Annual Disbursement:	\$ 850,000 (5% of assets)

Will Donate is Chairman of the foundation. May Donate, William B. Donate and Sheila Donate Plenty are trustees.

Selected grants reported for 2015:

\$100,000 to Philomath University  
\$300,000 to Wentworth Hospital Foundation  
\$50,000 to Philomath Antique Car Exhibit



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**Foundation (continued...):**

Cogswell Engineering Foundation, established in 1982 in Regal, Oregon.

Giving primarily for higher education and healthcare.

Financial Data (as of 10/30/2015):

Assets Amount: \$43,000,000

Total Giving: \$ 8,040,000

Minimum Annual Disbursement: \$ 2,150,000 (5% of assets)

Will Donate is Chairman of the foundation.

Selected grants reported for 2015:

\$2,000,000 to Stanford University to establish Will Donate Chair in Engineering

\$750,000 to Hills Children's Hospital.

\$125,000 to Lesser Antilles Reef Project Fund

**Giving to Philomath University**

**Total Giving:** \$117,000

**Anonymous Giving:** Unknown

**Significant Commitments:**

\$50,000 Reunion 1997 (40<sup>th</sup>)

\$10,000 Homecoming 1988

\$30,000 Randall Hall Building Fund 1986

**Endowed Funds:** None

**Influence on Corporate Giving:** Donate is Chairman of Cogswell Engineering and Chairman of the Cogswell Engineering Foundation.

**Corporate Matching Gift?:** Yes 1:1 up to \$2,000.

**Philanthropy**

**Nonprofit Boards:** Donate Family Foundation, Cogswell Engineering Foundation

**Non-Philomath University Giving (include political contributions):**

2016 \$250 to the campaign of Oregon Democratic Representative Meg Kapler.

2016 \$500 to the Democratic National Committee

In 2010, Cogswell Engineering contributed \$10,000 to the Democratic National Committee.

**Family Giving:** In 2014, May Donate was listed in the Philomath Theatre annual report as a "Platinum Patron" (donors of \$100,000 or more). In 2012, she contributed \$50,000 to 4-H in Regal County.

**Family Giving (continued...):**

In 2014, the Bookbinder family contributed \$17 million and had a library named for them on the campus of Shreveport University in Natchitoches, LA.

**Family History:**

Will Donate's father, Justin Donate, was born in Fayette County, PA, in 1870. He was of Scotch ancestry, but representatives of the family left Scotland and established themselves in Ireland several generations before his birth. For many years, Justin Donate's father, Jeremiah, had operated the old Crawford ferry across the Monongahela River, and later he owned another ferry, besides developing a substantial business in the building of boats both for his own use and for sale. Justin moved to Topeka, KS, married Betty Alexander, and had a son, William B. Donate.

**Relevant Connections:** Dean Gerald Lewis

**Other: (relevant articles, more family information...)**



**Will Donate**