Jesika Davis
CONSULTING
WOMEN-OWNED BOUTIQUE CONSULTING

jesika@jesikadavis.com
530-354-4860
jesikadavisconsulting.com
Dartmouth, Massachusetts

Strategic Growth. Lasting Impact.

PROSPECT RESEARCH · WORK SAMPLE

Prospect Research Brief

Margaret "Peg" Hallowell
Prepared for Sandbar Community Kitchen

PREPARED FOR	Sandbar Community Kitchen · Renata Oliveira, Executive Director
SUBJECT	Margaret "Peg" Hallowell, Westhaven, Massachusetts
CRM RECORD	Bloomerang #2214 · Identity confidence: High
PREPARED BY	Jesika Davis, Founder & Principal Consultant · November 2026

About this sample. Peg Hallowell, her family, the Hallowell Family Fund, Sandbar Community Kitchen, and every organization, gift, address, and figure in this brief are fictional. The structure is the one I use for real donor profiles: a summary a director can read in two minutes, the giving record, who the person is, where the money is, a capacity estimate that says where it came from, and a plain-text narrative ready to paste into the CRM.

A good brief tells you three things: whether to ask, how much, and who should do the asking. Everything else is support for those three answers.

01

Summary

Peg Hallowell, 71, is a retired hospital pharmacy director who has lived in Westhaven since 1984. She and her late husband, Dr. Thomas Hallowell, advised the Hallowell Family Fund, a donor-advised fund at the Greater Westhaven Community Trust created in 2009. Since Tom's death in 2022 she has been its sole advisor. The fund's giving centers on food access, hospice care, and the Westhaven Public Library.

She has given Sandbar $4,650 across nine gifts since 2020, every year, including two $1,000 grants from the family fund. Her connection is personal and recent: she volunteered in the dining room every Tuesday from January to June 2025, and told Renata in May that her brother "would have been a Second Shift trainee if it had existed in 1990."

Her wealth is not visible in a wealth screen. The screening tool rates her capacity at $25,000 over five years from a modeled home value. That misses the family fund, the 2023 sale of Tom's share of a three-physician practice, and a second home on Nantucket held in trust. Her real capacity is well above the screen.

> Recommendation: Renata, with board member Ellen Marsh (a fellow library trustee), should ask Peg for a $10,000 gift to Second Shift in early 2027, with a second conversation about a named fund for trainee wages in her brother's memory.

GIVING TO SANDBAR

YEAR	TOTAL	GIFTS
2020	$250	Year-end appeal, check (Dec 28).
2021	$400	$250 year-end; $150 Harvest Dinner ticket (attended with Tom).
2022	$500	$500 "in memory of Thomas Hallowell," online, Oct 4. Tom died Sept 2022.
2023	$1,250	$1,000 grant from the Hallowell Family Fund (unrestricted); $250 year-end.
2024	$1,000	$1,000 grant from the Hallowell Family Fund, designated "Second Shift." First restricted gift.
2025	$1,250	$1,000 year-end check; $250 Harvest Dinner (attended, sat with Ellen Marsh). Tuesday dining-room volunteer Jan–Jun.
2026	—	No gift yet. Year-end appeal mails Nov 18.
Total	**$4,650**	**Nine gifts. Largest single gift $1,000. Two gifts via the family fund.**

Note: the two family-fund grants appear on her individual record in Bloomerang because the Trust's grant letters named her as advisor. The fund has no separate record. Create one (#2214-F) so fund and personal giving can be reported apart.

02

Who she is

Family

- **Husband:** Dr. Thomas R. Hallowell (1949–2022), internist, co-founder of Westhaven Internal Medicine Associates in 1986. Obituary (Westhaven Standard, Sept 2022) asks for gifts to Saltmarsh Hospice and the Westhaven Public Library in lieu of flowers.
- **Brother:** James "Jimmy" Costa (1958–2019). Obituary describes him as a cook "at restaurants from Westhaven to Provincetown" who "struggled with addiction and found recovery late." Peg referenced him unprompted in May 2025.
- **Children:** Daughter Anne Hallowell-Reyes, 44, pediatric nurse practitioner, Providence. Son Michael Hallowell, 41, software engineer, Seattle. Three grandchildren.

Career and interests

- Director of Pharmacy, Westhaven General Hospital, 1996–2019; staff pharmacist there from 1984. BS Pharmacy, Massachusetts College of Pharmacy, 1978.
- Trustee, Westhaven Public Library, 2016–present; chaired the 2021 renovation campaign committee ($1.4M goal, met).
- Saltmarsh Hospice volunteer since 2023; serves on its patient-family advisory council.
- Member, St. Anne's Episcopal Church, Westhaven; past vestry member.
- Gardener. Her garden was on the 2024 Westhaven Garden Club tour.

The Hallowell Family Fund

Donor-advised fund at the Greater Westhaven Community Trust, established 2009. Peg is sole advisor since 2022; Anne Hallowell-Reyes is named successor advisor. The Trust's annual reports list grants by fund. Where the fund gave alongside others, the amount shown is the full grant.

ORGANIZATION	YEARS	GRANT AMOUNTS
Saltmarsh Hospice	2022–2025, every year	$5,000 (2022, memorial); $2,500 each year since
Westhaven Public Library Foundation	2016–2025	$1,000–$2,500 a year; $25,000 to the 2021 renovation campaign
Westhaven Food Bank	2010–2025, every year	$1,000–$3,000 a year
Sandbar Community Kitchen	2023, 2024	$1,000 each

ORGANIZATION	YEARS	GRANT AMOUNTS
St. Anne's Episcopal Church (outreach fund)	2012–2025	$500–$1,500 a year
Massachusetts College of Pharmacy	2018, 2023	$2,500; $5,000
Tidewater Recovery House	2020, 2021	$500 each, "in memory of James Costa"

Grants the fund makes alone run $500 to $5,000, with one $25,000 campaign gift. Food access and end-of-life care are the throughlines. The two Tidewater Recovery House gifts in her brother's name are the clearest signal of what a Second Shift ask could mean to her.

03

Household and capacity

Assets and income indicators

- **Primary home:** 18 Pleasant Street, Westhaven. Bought 1984 for $112,000; 2026 assessed value $684,000; no mortgage on record. Deeded to the Hallowell Family Trust in 2018.
- **Second home:** 7 Quidnet Road, Nantucket, held in the same trust since 2018. 2026 assessed value $2.1M. Not in the wealth screen because the trust, not Peg, is the owner of record.
- **Practice sale:** Westhaven Internal Medicine Associates was acquired by Southcoast Physician Partners in March 2023. Terms were not disclosed; the practice had three physician-owners and about 4,200 patients. Tom's estate, which Peg administers, held his one-third share.
- **Retirement income:** 35 years at a hospital system with a defined-benefit pension, plus Tom's. Comfortable, not lavish.
- **Mailing address:** 18 Pleasant St, Westhaven, MA, current. Email and mobile on the Bloomerang record confirmed by Renata in 2025.

Wealth screen (iWave, Oct 2026)

Overall score 3 of 5; propensity strong, capacity moderate; estimated five-year capacity $25,000. The figure rests on the Pleasant Street assessment and modeled income only. It does not see the Nantucket property, the family fund's balance, or the practice sale, because none of them is held in her own name. iWave lists 23 outside gifts totaling about $19,000, all consistent with the fund table above.

Capacity estimate

These are my estimates, not found figures, and they are deliberately conservative.

Personal annual giving	$2,500–$5,000 to Sandbar, up from the current $1,000–$1,250 pattern
Through the family fund	$5,000–$10,000 a year to a program she has chosen; she has already restricted to Second Shift once
Major or memorial gift	$25,000–$50,000 over three years for a named purpose, on the pattern of the library campaign gift
Planned gift	Realistic. She has a trust, a successor advisor named on the fund, and no spouse. Not for the first conversation.

04

Approach

Who asks

Renata, with Ellen Marsh. Peg knows Renata from the dining room and sat with Ellen at the 2025 Harvest Dinner; they serve on the library board together. The board chair should not be in the room. Peg's giving history is relational and quiet, and three people will read as a campaign.

The ask

1. **Now (Nov 2026):** Hand-written note from Renata on the year-end appeal, mentioning the second 2027 cohort and the six Tidewater Recovery House seats. No ask amount.
2. **January 2027:** Invite Peg to cook a Tuesday dinner with Cohort 1 in its first week. Let her see the people the grant pays for.
3. **February 2027:** A visit at her home. Ask for $10,000 to Second Shift from the family fund for 2027, and raise the idea of the James Costa Trainee Fund, a named fund covering weeks 1–3 wages for one cohort a year (about $6,000 a year), as something to think about.
4. **If yes:** Report to her in June after Cohort 1 graduates, with the outcomes table, before any further ask.

What to avoid

- Do not lead with her brother. She raised him once; let her raise him again.
- Do not mention the Nantucket house or the practice sale. She has never discussed either with Sandbar and should not learn we know.
- Do not send the standard major-donor event invitation. She skipped every event except the Harvest Dinner.

Copy & paste: CRM narrative

Plain text. Replaces the current notes on record #2214.

Margaret "Peg" Hallowell, 71, Westhaven. Retired Director of Pharmacy, Westhaven General (1996–2019). Widow of Dr. Thomas Hallowell (d. Sept 2022), co-founder Westhaven Internal Medicine Associates (sold to Southcoast Physician Partners 2023). Library trustee since 2016; chaired 2021 renovation campaign. Saltmarsh Hospice volunteer. St. Anne's Episcopal. Children Anne (Providence) and Michael (Seattle).

Sole advisor, Hallowell Family Fund (DAF, Greater Westhaven Community Trust, est. 2009; successor advisor Anne Hallowell-Reyes). Fund gives to Saltmarsh Hospice, Westhaven Library, Westhaven Food Bank, St. Anne's; $25K to library campaign 2021; two $500 gifts to Tidewater Recovery House in memory of brother James Costa (d. 2019, cook, in recovery).

Sandbar: $4,650 / 9 gifts 2020–2025, every year; incl. $1,000 DAF grants 2023 (unrestricted) and 2024 (Second Shift). Tuesday dining-room volunteer Jan–Jun 2025. Harvest Dinner 2021, 2025 (sat with Ellen Marsh). Told

Renata May 2025 her brother "would have been a Second Shift trainee."

Capacity (estimate): personal $2.5–5K/yr; DAF $5–10K/yr; named gift $25–50K over 3 yrs. Wealth screen ($25K/5 yr) understates; trust-held assets not visible. Plan: Renata + Ellen Marsh, home visit Feb 2027, ask $10K DAF to Second Shift; raise James Costa Trainee Fund idea. Prospect brief on file, Nov 2026.

Jesika Davis Consulting · Strategic Growth. Lasting Impact.

Prospect research, grant writing, and fractional development leadership for nonprofits · Dartmouth, Massachusetts

jesika@jesikadavis.com · 530-354-4860 · jesikadavisconsulting.com

Work sample. All people, organizations, addresses, gifts, and figures in this document are fictional.