

# Beginners' Bootcamp: Research Essentials



SESSION DATE: October 12<sup>th</sup>, 2016

SESSION TIME: 10:45 – 12:00

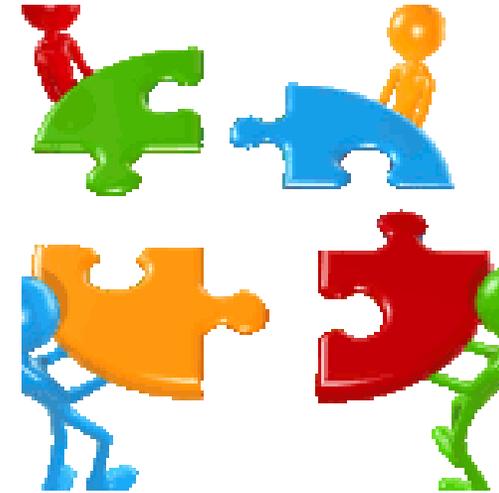
1:45 – 3:00

- Tracey Church, Tracey Church & Associates
- Amy McKinnon, Toronto General & Western Hospital Foundation



# Agenda

- Speakers & Introductions
- Introduction to Development Research
- Research Stages
- Key Elements in Profiles for:
  - Foundations
  - Corporations
  - Individuals
- Prospecting
- Working with the Major Giving & Development Team
- Media Monitoring
- Time Management
- Research beyond the profile
- Other Topics – brought forward throughout the day
- Questions & Discussion & Hand-outs





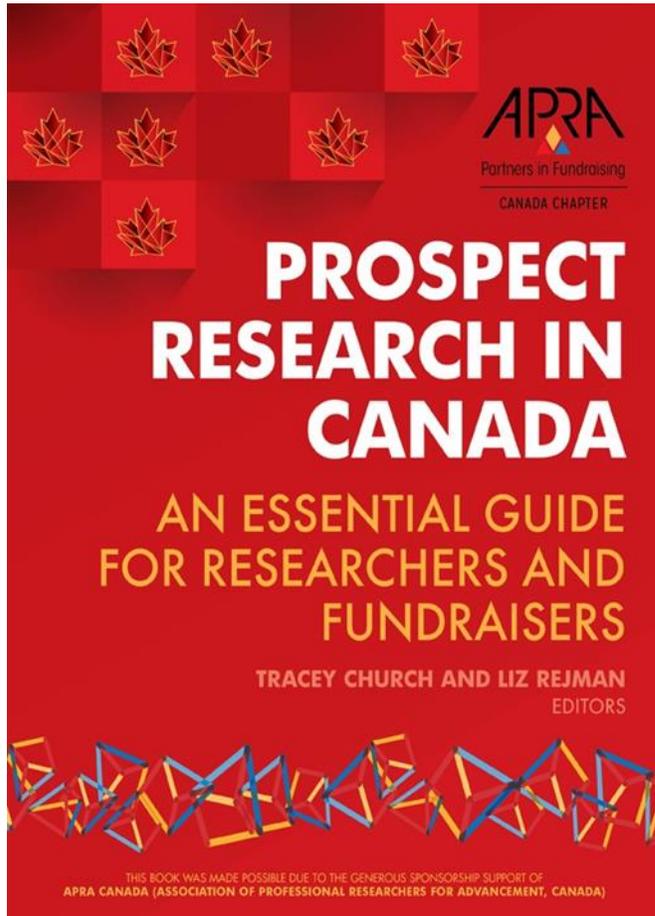
# Who are we? And who are you?

- Tracey Church, MLIS
- Amy McKinnon, CFRE
- Who is in the room?
  - New to prospect research?
  - New to fundraising?
  - Less than 6 months in position?
  - Research is a full-time or part-time part of your position?
  - One man shop?





# Launching at the APRA-Conference!



Pre-sales Discount available today at: <http://hilborn-civilsectorpress.com/products/prospect-research-in-canada>

We will also be doing a draw today for one lucky attendee!

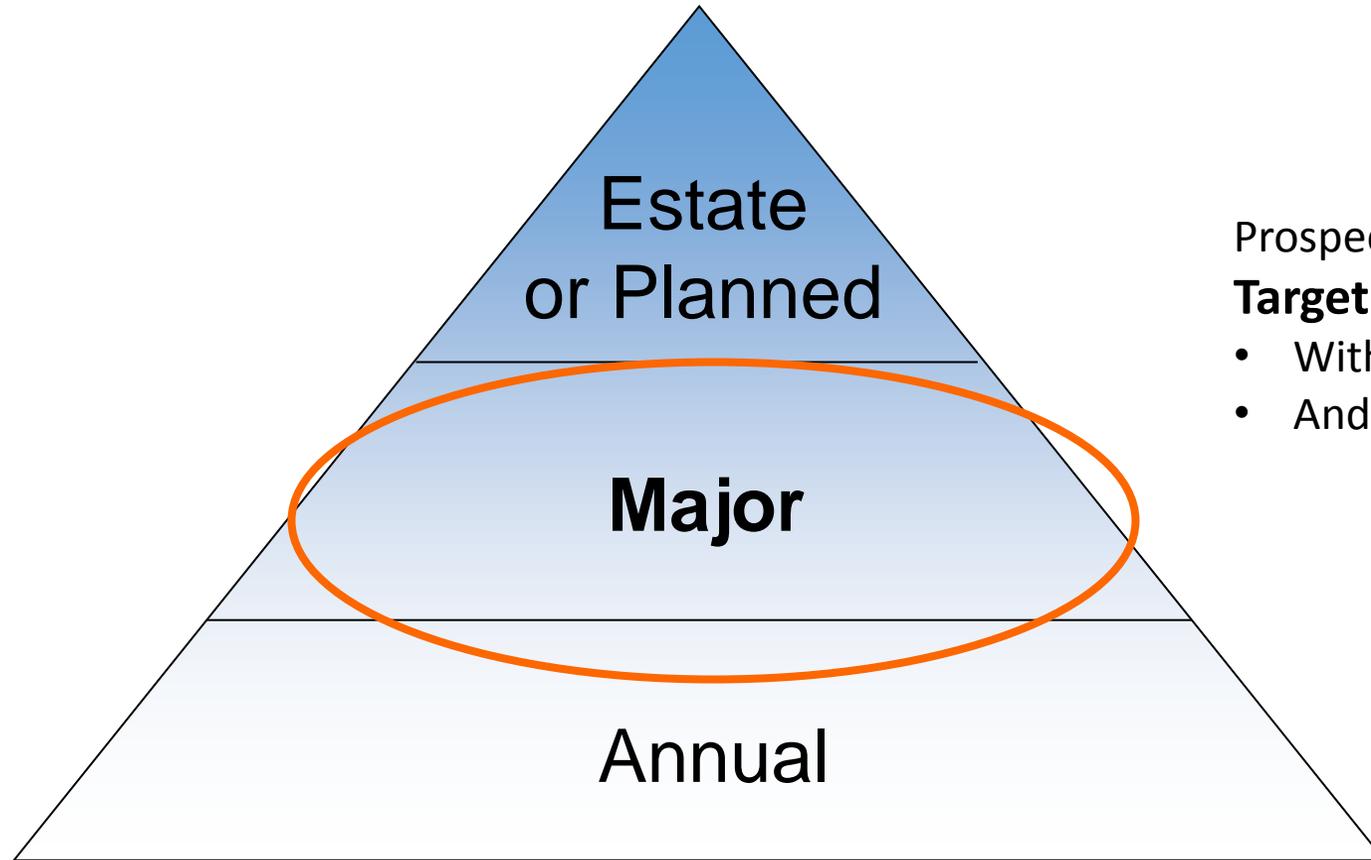


# Introduction to Development Research

- Prospect researchers do research to find potential donors for their organizations that have the *affinity* and the *capacity* to give at the *major giving level*\*
  - \*as defined by each organization
- **APRA: Association of Professional Researchers for Advancement**
  - Conferences, publications, symposiums, mentors, webinars, networking and resource materials
- **APRA International** [www.aprahome.org](http://www.aprahome.org) (US \$225/year)
- **APRA-Canada** [www.apracanada.ca](http://www.apracanada.ca) (\$45/year)



# Traditional Fundraising Pyramid



Prospect Researchers

### Target Major Gifts

- With some Planned Giving
- And some Sponsorship

# Continuum of Philanthropy

Living Stages	Survive	Help	Invest
	Highly personal sharing Known recipients Informal, direct, immediate responses	Personal giving and involvement Ethnic-specific Responsive, compassionate	Ethnic-specific Pan-ethnic and mainstream Formal, proactive, long term, planned
Increasing cultural, social and financial stability →			
Giving Stages			
	<b>Motivation</b> Sharing among social and economic peers	Giving to less fortunate Desire to give back Identifying with need Supporting projects	Empowering vision Building the ideal community Producing programs
	<b>Vehicles</b> Family Voluntary associations Faith-based organizations Mutual aid societies	Family and voluntary associations Ethnic organizations Community causes Faith-based organizations Nonprofit organizations	Ethnic and pan-ethnic organizations Noncommunity causes Mainstream organizations Private and community foundations
<b>Causes</b> Family or friends in need Children and elderly Remittances	Family and friends Education Cultural heritage Civil rights or social justice Health Remittances	Colleges and universities Cultural institutions Civil rights or economic development Hospitals and medical research	

Diana S. Newman, “Opening Doors: Pathways to Diverse Donors”, 2002

# Generational Impact

## GIVING ACROSS THE GENERATIONS



### Generation Y

- Born 1981 – 1995 (age 18-32 as of 2013)
- Represent 15% of total giving
- 3.4 million donors in Canada
- 62% give
- \$639 average annual gift
- 4 charities supported



### Boomers

- Born 1946 – 1964 (age 49-67 as of 2013)
- Represent 32% of total giving
- 5 million donors in Canada
- 78% give
- \$942 average annual gift
- 4.9 charities supported



### Generation X

- Born 1965 – 1980 (age 33-48 as of 2013)
- Represent 27% of total giving
- 4.8 million donors in Canada
- 79% give
- \$831 average annual gift
- 4.5 charities supported



### Civics

- Born 1945 and earlier (age 68+ as of 2013)
- Represent 25% of total giving
- 2.4 million donors in Canada
- 87% give
- \$1,507 average annual gift
- 7 charities supported

*Generational groups, total Canadian population, and giving data (on average)*

hjc & Blackbaud's 2013 report, "The Next Generation of Canadian Giving"



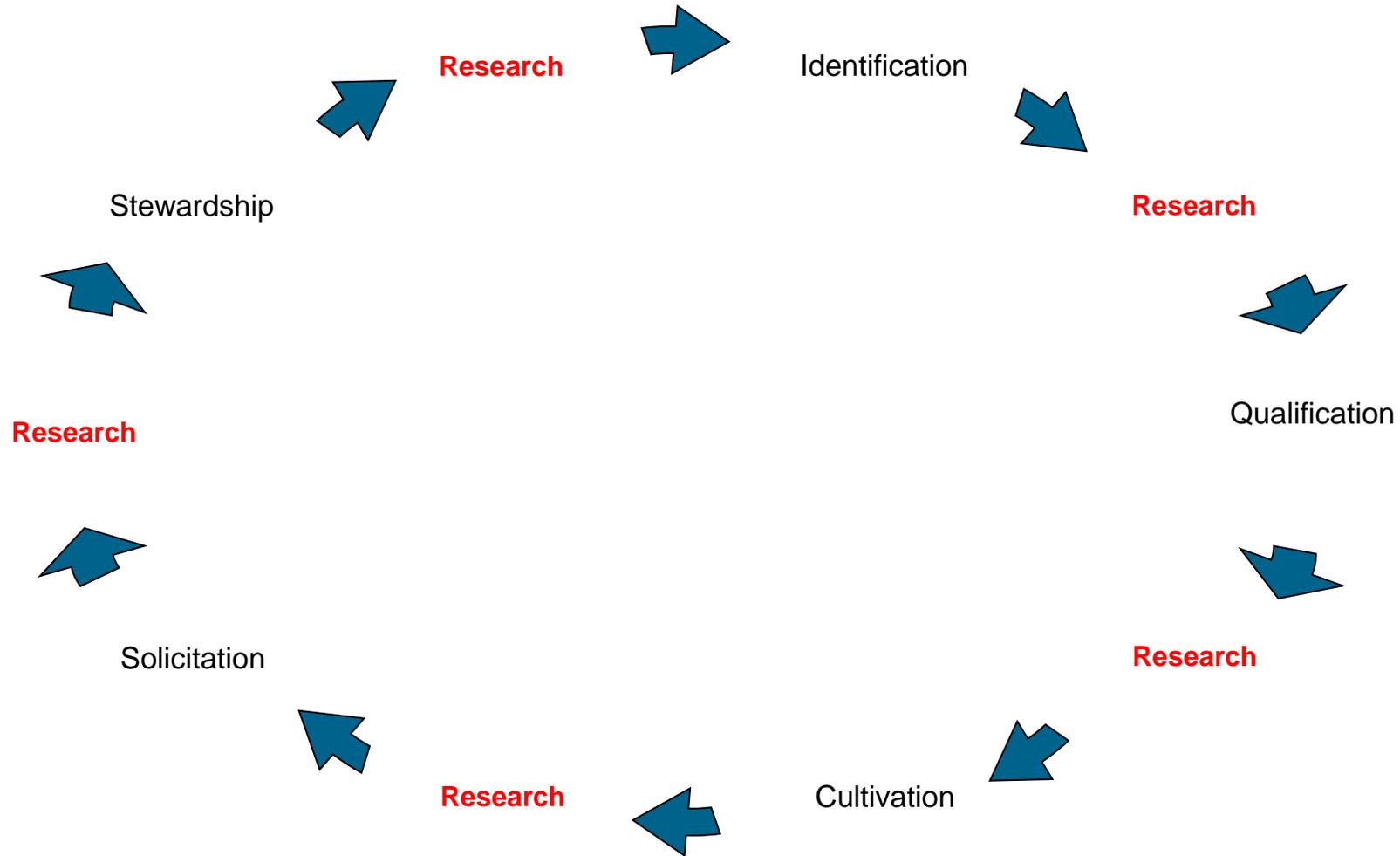
# Research Stages

- don't try and do it all at once – or you will become overwhelmed!

Cultivation Stage	Prospect Research	Prospect Management
<b>Identification</b>	Identify prospects through various sources	Add/update prospects in database
<b>Qualification</b>	Collect information regarding new prospect	Rate prospects (internal and/or external tool) for capacity & affinity. MG team plays a role in qualifying prospects.
<b>Cultivation</b>	Collect news alerts, update development officers on any new activity. Which cultivation activities might interest the prospect? Profile may be requested at this stage.	Prospects are assigned to development officers for cultivation. Make sure "right" prospects are invited to the "right" cultivation & stewardship events (at the "right" time)
<b>Solicitation</b>	Compile profile information for development officer's (& volunteer's) first meeting with prospect. Identify probable ask amount based on past giving, capacity, and development officer's added knowledge through cultivation regarding affinity	Track prospects along cultivation cycle (moves management with team)
<b>Stewardship</b>	Research includes ongoing tracking of the donor in regard to change in financial status and potential and timing for next major giving ask.	Team: Update database after gift, new rating, stewardship activity, and beginning date for next cycle of cultivation



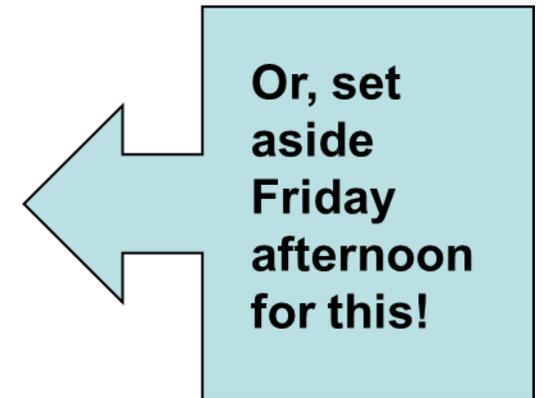
# The Cultivation Cycle: Research Staging





# Ideally:

- 50% **Reactive** Research
  - Research requests
  - List generation
  - List review
  - Prospect follow-up
- 50% **Proactive** Research
  - Find *NEW* prospects for pipeline
  - *PUSH* out generated leads to solicitors
  - Moves management of prospects through cultivation cycle → tracking & future solicitation strategies





# Key Elements in a Foundation Profile

Foundation Name	Examples of Gifts to Other Organizations <ul style="list-style-type: none"> <li>• And your organization if applicable</li> </ul>
Contact Information <ul style="list-style-type: none"> <li>• How do they like to be contacted?</li> </ul>	Possible Linkages to Your Organization <ul style="list-style-type: none"> <li>• And past activity with your organization</li> </ul>
Contact Person(s)	Application Process & Guidelines <ul style="list-style-type: none"> <li>• Follow these!</li> </ul>
Key Board Members & Staff	Initial Estimated Capacity Rating
Foundation Overview	Date of Profile
Philanthropic Interests <ul style="list-style-type: none"> <li>• Which ones align with your mission</li> </ul>	Name of Person Who Prepared the Profile
Geographic Focus	Sources Cited & Used



# Our Favourite Resources: Foundations

- [Imagine Canada](#) Grant Connect (fee)
  - or through Pillar NonProfit Network
- [Charity Village](#) Directories – Funders (free)
- [Canadian Charities Listings](#) (CRA) – T3010s (free)
- [BIG Online](#) Foundation Search (fee)
- [iWave PRO](#) – Prospect Research Online (fee)
- [CharityCAN](#) (fee)
- [Ajah Fundtracker](#) (fee)
- [US GuideStar](#) (free, basic) 990s
- [US Foundation Center](#) (free, basic) 990s
- Foundation websites (~25% have their own website)
- Public or university libraries



# T3010s

- All registered non-profit organizations in Canada must file a tax return with [Canada Revenue Agency \(CRA\)](#) that is called a T3010.
- The information from this form is available to the general public for free.
- Not great for prospecting as it includes *all* charities, not just granting organizations.

## **Includes:**

- Contact information
- Directors and officers
- Funding interests
- Financials
- Grants



CRA

Canada Revenue Agency  Canada

Search Canada.ca Search

Individuals and families | Businesses | Charities and giving | Representatives

Home → Charities and giving → Charities listings → Quick View

## THE J W MCCONNELL FAMILY FOUNDATION - LA FONDATION DE LA FAMILLE J W MCCONNELL - Quick View

[Charity's detail page](#)

Registration no.: 119240091RR0001

Designation: [Private foundation](#)

Website: [WWW.MCCONNELLFOUNDATION.CA](http://WWW.MCCONNELLFOUNDATION.CA)

**Programs and activities:**

Ongoing programs:

. Comprehensive initiatives to reduce poverty in communities across Canada . A Program to link university faculty/students with communities to foster Social entrepreneurship. . A program to make communities sport activities more accessible to youth in under-served communities . A partnership to strengthen & encourage special innovation in Canada . A program to to strengthen the capacity of community organizations . A national initiative to build resilient cities. A national program supporting sustainable food systems in Canada A national program fostering increased understanding & collective action onA program to support innovative approaches to children's mental health ...[less](#)

New programs:

Energy & the Economy A national program to support the transition to a green economy

Status	
Registered	1967-01-01

Reporting periods	
Quick View	Full View
▶ 2014-12-31 ◀	<a href="#">2014-12-31</a>
<a href="#">2013-12-31</a>	<a href="#">2013-12-31</a>
<a href="#">2012-12-31</a>	<a href="#">2012-12-31</a>
<a href="#">2011-12-31</a>	<a href="#">2011-12-31</a>
<a href="#">2010-12-31</a>	<a href="#">2010-12-31</a>



CRA

### Revenue



- Received donations (0%)
- Non-receipted donations (0%)
- Gifts from other charities \$164,000 (0%)
- Government funding \$761,870 (2%)
- All other revenue \$43,035,908 (98%)

**Total revenue: \$43,961,778**

### Expenses



- Charitable program \$4,952,758 (19%)
- Management and administration \$3,976,395 (15%)
- Fundraising (0%)
- Political activities \$10,000 (0%)
- Gifts to other registered charities and qualified donees \$16,723,382 (63%)
- Other \$915,871 (3%)

**Total expenses: \$26,578,406**

### Compensation

Total compensation for all positions	\$3,043,728
Full-time employees	24
Part-time employees	4
Professional and consulting fees	\$5,228,146

Ten highest compensated full-time positions	
\$250,000 - \$299,999	1
\$160,000 - \$199,999	2
\$120,000 - \$159,999	2
\$80,000 - \$119,999	5



# Imagine Canada

## Grant Connect

- Grant Connect is a fee-based service from Imagine Canada and uses not only the CRA information each year but also collects profile information from the Foundations directly providing a more robust search tool.



# Grant Connect: Example of Funding Interests Search

Funder Search

<p><b>Quick Lookup</b></p> <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	<p><b>Field of Activity / Population Served</b></p> <ul style="list-style-type: none"> <li>Social Services ▶</li> <li>Health ▶</li> <li>International ▶</li> <li>Religion ▶</li> <li>Environment ▶</li> <li>Sciences / Social Sciences ▶</li> <li>Arts and Culture ▶</li> <li>Education ▶</li> <li>Sports and Recreation ▶</li> <li>Charitable and Voluntary-Sector Development ▶</li> </ul> <p><b>Location of Organization or Initiative</b></p> <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	<p><b>Your selection</b></p> <ul style="list-style-type: none"> <li>Conservation ▶</li> <li>Animal Protection / Welfare ▶</li> <li>Energy Use ▶</li> <li>Agriculture ▶</li> <li>Waste / Pollution ▶</li> <li>Sustainable Communities / Practices ▶</li> <li>Green Space ▶</li> <li>Population / Carrying Capacity ▶</li> <li>Environmental Education ▶</li> <li>Environmental Health ▶</li> <li>Environmental Law ▶</li> <li>Water ▶</li> <li>Wildlife ▶</li> <li>Birds ▶</li> <li>Endangered Species ▶</li> <li>Fish / Marine Life ▶</li> <li>Forests / Trees ▶</li> <li>Biodiversity ▶</li> <li>Grasslands / Prairies ▶</li> <li>Lakes ▶</li> <li>Land Use ▶</li> <li>Land Trusts ▶</li> <li>Oceans / Coasts ▶</li> <li>Plant Life ▶</li> <li>Rivers / Streams ▶</li> <li>Watersheds ▶</li> <li>Wetlands ▶</li> </ul>
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**SHOW RESULTS (11483)**

**Advanced Search Options**

Category

- Include all
- Foundations
- Corporations
- Government
- Other

<p>Funder Location (country)</p> <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Include all"/>	<p>Language of Correspondence</p> <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Include all"/>
<p>Funder Location (province)</p>	<p>Type(s) of Support</p>



# Grant Connect: Sifton Foundation

## Quick Summary

[Visit Website](#)

**Open to Requests:** Yes

**Category:** Foundations

**Foundation Type:** Family foundation

**Foundation Activity:** Grantmaking

**Business Number:** 890231772RR0001

**Year Established:** 1989

**Source of Funds:** Awata Corporation, Sifton Properties Limited, Mowbray and Doris Sifton, the Sifton Family, and other donors.

**Fiscal Period End:** December 31st

**Grant range:** \$20,000 or less

## Funding Interests

- ✓ At-Risk Youth
- ✓ Children / Youth
- ✓ Dropout Prevention
- ✓ Parenting
- ✓ People with Disabilities

[>> Show More](#)

## Eligible Geographic Area(s)

- ✓ Brantford, ON
- ✓ Greater London Region
- ✓ Guelph, ON
- ✓ Kitchener-Cambridge-Waterloo Region
- ✓ Mississauga, ON

Confined to London and Middlesex County and other centres where Sifton Properties Ltd. has employees (Guelph, Brantford, Kitchener-Waterloo, and Mississauga).

## Mission / Philosophy

The Sifton Family Foundation provides grants in the categories of families, youth and children, seniors and persons with disabilities, with a special interest in teen pregnancy to encourage youth to stay in school and prepare for a successful future. Of special interest to the Foundation are:

- Programs to prevent teen pregnancy;
- Parenting and pre-parenting education;
- Programs for teen parents;
- Programs for school-age children;
- Programs that encourage children and teens to stay in school.
- Programs that support at-risk youth; and
- Programs that prepare youth for a successful future.



### Financial Data

	<u>2014</u>	<u>2013</u>	<u>2012</u>
Total Assets	\$9,193,495	\$8,756,370	\$8,804,923
Direct Charitable Activity	0	0	0
Total Gifts Provided (\$)	\$352,867	\$347,141	\$249,782
Total Gifts Provided (#)	58	54	49
Total Revenues	\$857,260	\$346,675	\$886,859

### Gift History

Year: 
 Sector: 
 Province/State: 
 Gift Size:

Gifts Display:

Gift Recipient	Cause of Recipient	Recipient Location	Gift Size	Year
Foundation for Gene and Cell Therapy <i>One time grant made to honour John Davidson's walk across Canada and to the Foundation in setting up an endowment to fund research.</i>	Health	London (Ontario)	\$100,000	1999
St.Joseph's - Hospice Of London	Health Care	London (Ontario)	\$50,000	2014
St.Joseph's - Hospice Of London	Health Care	London (Ontario)	\$50,000	2013
Youth Opportunities Unlimited, London & District	Children / Youth	London (Ontario)	\$37,500	2010
Youth Opportunities Unlimited, London & District	Children / Youth	London (Ontario)	\$37,500	2009
University of Western Ontario	Universities	London (Ontario)	\$31,892	2009
United Way of London and Middlesex	Community Development	London (Ontario)	\$30,688	2008
United Way of London and Middlesex	Community Development	London (Ontario)	\$30,000	2014



People & Contact Information: The Mowbray and Doris Sifton Family Foundation

Contact Information

Address: P.O. Box 5099, London, Ontario, N6A4M8
Language of Correspondence: English
Contact(s): Donna Thacker, Co-ordinator
Phone: (519) 434-1000
Fax: (519) 434-1009
E-mail: donna.thacker@sifton.com
Website: http://sifton.com/about/supporting-the-community/sifton-family-foundation.html

People

Contact(s)

Donna Thacker, Co-ordinator

Officers and Directors

Sherene Davidson, Chair
Carol Robertson, Secretary-Treasurer
Kevin Howlett
Rick Vandertuin
Dominic Ripepi
Geordan Robertson
Glen Sifton
Allyson Switzer

LinkedIn® Connections

Sifton Properties Limited: 37 employees in your network
Richard Sifton (2nd) President Sifton Properties
Toby Stolee (2nd) Director of Housing Operations at Sifton Properties Ltd.
Simon Bevan (2nd) General Manager, RiverBend Golf Community at Sifton Properties Limited
Kristin Nielsen (2nd) Leasing Manager at Sifton Properties Limited
In Your Network powered by LinkedIn®

Profile details last changed: July 28, 2016
New financial / gift data added: October 07, 2015



# Key Elements in a Corporate Profile

Corporation Name	Examples of Gifts to Other Organizations <ul style="list-style-type: none"> <li>• And your organization if applicable</li> </ul>
Contact Information <ul style="list-style-type: none"> <li>• Address, phone, email, social media, regional</li> </ul>	Sponsorship History
(Community) Contact Person(s)	Possible Linkages to Your Organization <ul style="list-style-type: none"> <li>• And past activity with your organization</li> </ul>
Key Board Members & Staff	Application Process & Guidelines <ul style="list-style-type: none"> <li>• Community giving site?</li> <li>• Online application form?</li> </ul>
Corporate Overview <ul style="list-style-type: none"> <li>• Do they have a foundation as well?</li> <li>• Include annual revenue</li> </ul>	Initial Estimated Capacity Rating
Philanthropic Interests	Date of Profile
Geographic Focus <ul style="list-style-type: none"> <li>• Is it just in regions in which they operate?</li> </ul>	Name of Person Who Prepared the Profile
Recent & relevant news	Sources Cited & Used



# Our Favourite Resources: Corporations

- [Google Finance](#) or [Globe Investor](#) (free)
- [Canadian Business Resource \(CBR\)](#) (basic free, also by subscription)
- [Canadian Newswire](#) (free, track your prospects using RSS feed)
- [Charity Village](#) (free)
- [D&B Canada](#) (dun & bradstreet): Hoover's Business Directory (fee)
  - Also available in iWave PRO
- [Scott's Ontario Manufacturers](#) (fee) – smaller businesses
- [Industry Canada](#) (free) – has contact names
- [SEDAR](#) (free) – Canadian public company reports
- [SEDI](#) (free) – Canadian public company shares
- [EDGAR](#) (free) – U.S. public company shares
- [LEDC](#) (free) City of London directory (new businesses & contact names)
- [BIG Online Corporate Directory](#) (fee)
- [iWave PRO – Prospect Research Online](#) (fee) – ZOOMInfo & D&B
- [CharityCAN](#) (fee) – Corporate Canada Directors
- **PUBLIC or university libraries** (free!)

Tracey's rule of thumb:  
Have **ONE** really good business directory – you don't need them all. Or better yet, see what you can get through a library

# Researching Canadian Companies

Finding out basic data about companies ought to be simple. It is not.

The Economist  
Apr 21st 2012

ONE of the five aims of the Open Government Partnership, a 55-country initiative strongly backed by the Obama administration, is “increasing corporate accountability”. But a new report shows how poorly many in the partnership—including some that pride themselves on transparency—score on providing the legal name, official address, incorporation date and status, and other basic details of the companies they register...





# Corporate Ways of Giving

Companies financially support their communities in various ways, including:

- Donations
- Sponsorships
- Deep discounts
- Collection from the public (scan when buy)
- Strategic partnerships (CRM – cause-related marketing)



# Corporate Websites

- Business Interests
- Business Locations
- Executive Speeches
- Press Releases
  - Gift announcements
  - Executive and board changes
  - Financial situation
  - Corporate developments
  - Regional news
- Philanthropic and community involvement
- Corporate Responsibility Reports

# Example of Google Finance



🔍
☰
🔔


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Finance
**ONEX Corporation** (TSE:OCX)
Add to portfolio
More results

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**Company**

- Summary
- News
- Related companies
- Historical prices
- Financials

**Markets**

News

Portfolios

Stock screener

Recent Quotes (180 days)

		chg   %
PWF	30.59	+0.240
POW	27.58	+0.19
CAFI	6.05	-
MG	52.68	+0.28
TD	57.41	+0.23
INN.UN	0.00	-
BEI.UN	49.81	-0.075
CUO	0.200	+0.010

Create portfolio from quotes

**79.57** +0.37 (0.47%)

Delayed: 1:06PM EDT  
TSE data delayed by 15 mins - Disclaimer  
Currency in CAD

Range 79.51 - 80.43

52 week 74.33 - 87.86

Open 79.67

Vol / Avg. 64,633.00/103,833.00

Mkt cap 7.96B

P/E -

Div/yield 0.07/0.35

EPS -11.88

Shares 103.13M

Beta 0.26

Inst. own -

Compare:    S&P TSX  IFP  LRL  XI  CH  SEC  SII  GDL

Zoom: [1d](#) [3d](#) [1m](#) [3m](#) [6m](#) [YTD](#) [1y](#) [5y](#) [10y](#) [All](#)

Aug 22, 2014 Price: 62.94 Vol: 725.40k



Sources include SIX.

**S&P TSX** 14,499.16 0.33%

**OCX** 79.57 0.47%

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**News** Relevance | Date

- A** Onex Corp reverses its normal exit strategy, plans to use IPO to sell stake i...  
Financial Post - Jun 6, 2016
- B** Onex Corp sells KraussMaffei to China National Chemical Corp for about \$1 bil...  
Financial Post - Jan 11, 2016
- C** How Onex is beating its private equity peers with 161% returns to shareholder...  
Financial Post - Mar 12, 2015
- D** Onex co-founder guilty in gross negligence tax case  
Toronto Sun - Jul 19, 2016
- E** Thomson Reuters Corp to sell IP & science business to Onex and Baring for...  
Financial Post - Jul 11, 2016

All news for ONEX Corporation »

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**Related companies**

Show: Most Recent Annual

	Company name	Price	Change	Valuation	d   m   y	Mkt Cap
OCX	<b>ONEX Corporation</b>	79.57	+0.37	0.47%	—	7.96B
IFP	Interfor Corp	14.75	+0.20	1.37%	—	1.04B
LRL	Luxor Industrial ...	0.355	-0.040	-10.13%	—	16.66M
XI	Exclamation Inves...	0.0200	0.0000	0.00%	—	1.57M



# iWave PRO Company Search

360 Search | PROfiles | PROscreen NEW | **ZoomInfo** | Dun & Bradstreet | Donations | Real Estate | Prospects of Wealth | Track Wealth | Political Giving | Foundations/Charities | SEC Filings | Matchi

People (12) | **Company (18)** | Alumni

Record (1)

Back | Add to Profile | 360 | Export Results | Print | Help

**Company Information** | People (394) | Affiliates (8)

**Name:** Onex  
**Country:** [Dropdown]  
**State/Province:** [Dropdown]  
**ZIP Code:** [Text]

**Company Information**

**Industry:** Accounting & Accounting Services, Advertising & Marketing, Aerospace & Defense, Aggregates, Concrete & Cement, Agriculture

**NAICS:** [Dropdown]

**Website:** www.example.com

**Revenue:** Under \$500,000, \$500,000 - \$1 million, \$1 million - \$5 million, \$5 million - \$10 million, \$10 million - \$25 million

**Employees:** Under 10, 10 - 19

**Name:** Onex Corp.  
**Phone:** (416) 362-7711  
**Fax:** (416) 362-5765  
**Website:** www.onex.com  
**Address:** 161 Bay Street, Toronto Ontario M5J 2S1, Canada

**Company Background & Description**

**Revenue:** Over \$5 billion  
**Employees:** Over 10,000  
**Industry:** Finance , Brokerage  
**SIC :** 6211  
**NAICS:** 523110 , 523120 , 523910 , 523999

**Description:** Onex Corporation (Onex) is a Canada-based private equity investor and alternative asset manager. Onex manages approximately \$4.8 billion of third-party capital through its Onex Partners and ONCAP families of funds, as well as Onex Credit Partners. Onex also has a real estate investment platform, Onex Real Estate Partners. Onex has investments in electronics manufacturing services, aerostructures, healthcare, financial services, customer support services, metal services and other businesses. In August 2007, Onex, in partnership with The Carlyle Group, acquired Allison Transmission, Inc. from General Motors Corporation. In December 2007, Onex completed the acquisition of Husky Injection Molding Systems Ltd. (Source: ARS)



# Key Elements in an Individual Profile

Connection / Link to your Organization	Summary of Giving, relationship connections, current assignments, summary of recent activities
Research Rating & Gift Rating	Estimated capacity, affinity, and likelihood
Biographical Details	Age, Family, Contact Information, other relevant information
Other Philanthropic Activity	Donations, personal/family foundation, volunteer activity
Career / Employment	Just the highlights focus on current & recent employment, corporate directorships
Wealth Indicators	Rating in <i>Canadian Business</i> , Salary & Compensation, known stock holdings, private company ownership, real estate, inheritance, other notable indicators of wealth, i.e. art collection, private school tuition
Other	Honours & Awards, Education, details on the profile itself (when compiled, by who, for who, sources)



## And...

- Cite all sources
- Who did the research
- Date of research
- Who requested the research
- Who identified the prospect
- Add information to the database



# Our Favourite Resources: Individuals

- [Canadian Business Resource](#) (by executive)
- [CharityCan](#)
  - Canadian Who's Who\*, Donations to Other Orgs, Political Donors, Corporate Canada Directors, ZoomInfo, Public Sector Salaries, Charity Directors, Profiles, Relationship Mapping, ProspectPRIME
- [iWave PRO – Prospect Research Online](#)
  - ZOOMInfo, D&B, Donations to Other Orgs, Real Estate, Wealth Ratings, Political Giving, Foundations, Matching Gifts, SEC Filings, PROScore and PROScreen
- Alumni directories (online & print)
- Obits (for family connections)
- Financial Post Directory of Directors\*
- Who's Who in Canadian Business (defunct 2005) Print & CD\*
- Top 100's
- [Realtor.ca / MLS](#) & [ZooCasa](#) - for real estate information (home listing prices)
- [SEDAR](#) (online) holdings/info for each public company
- [SEDI](#) (online) share holdings in public companies
- [EDGAR](#) (online) - US Securities
- [Charity Village News](#) – Newsbytes
- PUBLIC or university libraries

\* = older directories are good for retired people



**Warning!**  
For all resources check if they are “auto-generated” and when last updated.



# Gifts to Other Organizations

*the BEST indicator of capacity & giving level!*

Alerts | Searches | My Account | Training | Support | Feedback | Log Out

Search People: eg John Doe...

360 Search | PROfiles | PROscreen | ZoomInfo | Dun & Bradstreet | **Donations** | Real Estate | Prospects of Wealth | Track Wealth | Political Giving | Foundations/Charities | SEC Filings | Matchi

Change Country: United States | Canada

Canada

Donor (244) | Recipient

Search | Clear

Name: Gerald Schwartz | all

Type: All Donors  
 Individuals (79% of gifts)  
 Corporations (15% of gifts)  
 Foundations (3% of gifts)  
 Other (3% of gifts)

Recipient Information

Name: | all

Province: |

Postal Code: |

Category: |

Gift Information

Type: |

Year: | 1990 - 2016

Value Range: low - high

Include Unspecified

Filter Information

Donor Name	Type	Matches	Gift Year	Gift Type	Gift Range	Recipient Name	City	Province	Source
Gerald Schwartz and Heather Reisman		94	2014	Cumulative	\$20,000,000 - \$29,999,999	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2015	Cumulative	\$20,000,000 - \$29,999,999	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2014	Annual Gift	\$10,000,000 - \$19,999,999	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2010	Cumulative	\$10,000,000+	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2007	Cumulative	\$5,000,000+	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2006	Cumulative	\$5,000,000+	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2005	Cumulative	\$5,000,000+	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2002	Capital / Campaign	\$3,000,000+	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2003	Cumulative	\$3,000,000+	Mount Sinai Hospital Foundation of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2010	Cumulative	\$1,000,000 - \$4,999,999	SickKids (The Hospital for Sick Children) Foundation	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2003	Capital / Campaign	\$1,000,000 - \$4,999,999	The Governing Council of The University of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather M. Reisman		2	2001	Annual Gift	\$1,000,000 - \$4,999,999	The Governing Council of The University of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2011	Cumulative	\$1,000,000 - \$4,999,999	SickKids (The Hospital for Sick Children) Foundation	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2012	Cumulative	\$1,000,000 - \$4,999,999	SickKids (The Hospital for Sick Children) Foundation	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2013	Cumulative	\$1,000,000 - \$4,999,999	SickKids (The Hospital for Sick Children) Foundation	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2014	Cumulative	\$1,000,000 - \$4,999,999	SickKids (The Hospital for Sick Children) Foundation	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2013	Capital / Campaign	\$1,000,000 - \$4,999,999	The Governing Council of The University of Toronto	Toronto	Ontario	PDF
Gerald Schwartz and Heather Reisman		94	2015	Annual Gift	\$1,000,000 - \$4,999,999	SickKids (The Hospital for Sick Children) Foundation	Toronto	Ontario	PDF
Heather Reisman and Gerald W. Schwartz		7	2011	Cumulative	\$1,000,000 - \$2,499,999	United Way Of Toronto-York Region	Toronto	Ontario	PDF
Heather Reisman and		7	2009	Cumulative	\$1,000,000 -	United Way Of Toronto-	Toronto	Ontario	PDF

Displaying 1 - 50 of 244

PRO Suggests: ZoomInfo: (177) | Track Wealth: (3) | Political Giving: (41) | Foundations/Charities: (44)



# NOZA – available from BB or CharityCAN

CharityCAN

HOME

CHARITY RESEARCH

- CHARITY SEARCH
- SAVED SEARCHES
- MY CHARITIES
- SAVED COMPARISONS

PROSPECT RESEARCH

- INTEGRATED SEARCH
- CANADIAN WHO'S WHO
- DONATION RECORDS**
- POLITICAL DONORS
- CORPORATE CANADA
- ZOOMINFO
- PUBLIC SECTOR SALARIES
- CHARITY DIRECTORS

SAVED SEARCHES

SAVED RESULTS

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**Q Donation Records Search**

What You Are Searching (refine search terms)

Search Name: Gerald Schwartz  [Save this Search](#) [SAVE](#)

**Total Records Found: 887**

[EXPORT](#) [PRINT](#) [SAVE SELECTED](#)

Donor Name	Amount	Recipient Name	Gift Type	Year	Recipient City	Recipient Province	Source	Select All Displayed	Additional Data Sources
THE GERALD SCHWARTZ & HEATHER REISMAN FOUNDATION	\$80,500,000 - \$80,500,000	HESEG FOUNDATION	Gift From Charitable Organization	2015 - 2015	TORONTO	ON	View Donor Record Source	<input type="checkbox"/>	
Gerald Schwartz & Heather Reisman	\$20,000,000 - \$29,999,999	Mount Sinai Hospital	Cumulative Giving	2013 - 2014	Toronto	ON	View Donor Record Source	<input type="checkbox"/>	
Gerald Schwartz & Heather Reisman	\$20,000,000 - \$29,999,999	Mount Sinai Hospital Foundation of Toronto	Cumulative Giving	2013 - 2014	Toronto	ON	View Donor Record Source	<input type="checkbox"/>	
THE GERALD SCHWARTZ & HEATHER REISMAN FOUNDATION	\$13,400,000 - \$13,400,000	HESEG FOUNDATION	Gift From Charitable Organization	2009 - 2009	TORONTO	ON	View Donor Record Source	<input type="checkbox"/>	
Gerald Schwartz and Heather Reisman	\$10,000,000 and up	Mount Sinai Hospital	Capital Gift / Campaign Gift	2009 - 2010	Toronto	ON	View Donor Record Source	<input type="checkbox"/>	
Gerald Schwartz & Heather Reisman	\$10,000,000 - \$19,999,999	Mount Sinai Hospital Foundation of Toronto	Annual Gift	2013 - 2014	Toronto	ON	View Donor Record Source	<input type="checkbox"/>	
THE GERALD SCHWARTZ & HEATHER REISMAN FOUNDATION	\$7,260,000 - \$7,260,000	HESEG FOUNDATION	Gift From Charitable Organization	2013 - 2013	TORONTO	ON	View Donor Record Source	<input type="checkbox"/>	



# KCI Sector News

**KCI** >> I'M THINKING ABOUT... THE LATEST NEWS AND TRENDS français

**KCI MAJOR GIFT NEWS** HAVE NEWS TO SHARE? [Click here to submit it to us](#) subscribe to KCI's news feed  [previous](#) : [next](#)

Mary Kay Ash Charitable Foundation Gift: \$100,000 Recipient: Look Good Feel Better <a href="#">more »</a>	Posted September 2016
Susan Glass and Arni Thorsteinson Gift: \$500,000 Recipient: Assiniboine Park Conservancy <a href="#">more »</a>	Posted September 2016
Canadian Pacific Gift: \$2,000,000 Recipient: Alberta Children's Hospital <a href="#">more »</a>	Posted September 2016
In Honour Of The Ones We Love Gift: \$185,000 Recipient: Ronald McDonald House Charities Southwestern Ontario <a href="#">more »</a>	Posted September 2016
Paul A. MacPherson Gift: \$5,000,000 Recipient: McMaster University <a href="#">more »</a>	Posted September 2016
Economical Insurance Gift: \$100,000 Recipient: Junior Achievement Canada	Posted September 2016

TORONTO MONTREAL CALGARY VANCOUVER OTTAWA HALIFAX EDMONTON Contact Us - Privacy - Connect with KCI :

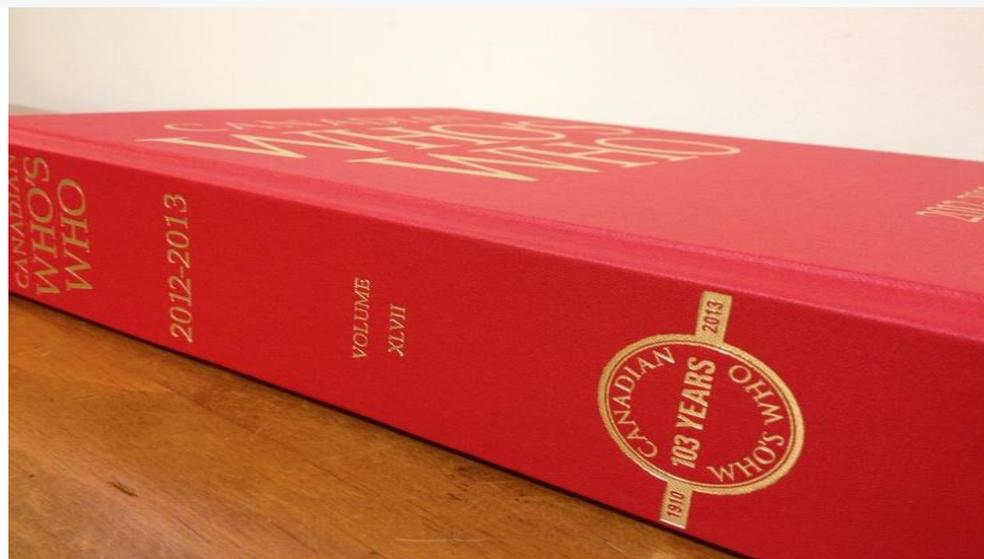


# Canadian Who's Who

## Canadian Who's Who Biography

[Abbreviations Index](#)

**SCHWARTZ, Gerald Wilfred**, O.C., B.Comm., LL.B., M.B.A., Ph.D. (Hon.), LL.D.; businessman; b. Winnipeg, Man. 24 Nov. 1941; s. Andrew O. and Lillian (Arkin) Schwartz; m. Heather Reisman; children; Carey, Jill, Andrea, Anthony; e. Univ. of Man. B.Comm. 1962, LL.B. 1966; Harvard Univ. M.B.A. 1970; FOUNDER, CHAIR AND C.E.O., ONEX CORPORATION 1984– ; Dir., Celestica Internat. Holdings, Inc.; Vice-Chair, Dir., Gov. & Mem. Exec. Ctte., Mt. Sinai Hosp.; Chair of the Bd. of Trustees, Cdn. Friends of Simon Wiesenthal Center; Bd. of Trustees, Simon Wiesenthal Centre; Chair, HESEG; called to Bar of Man. 1966; law practice Asper, Freedman & Co. Winnipeg 1966–68; Assoc., Corporate Finance, Estabrook & Co. Inc. N.Y. 1970, Vice-Pres. Corporate Finance 1971; Sr. Assoc., Bear, Stearns & Co. 1973, Vice-Pres. Corporate Finance 1974; Co-Founder, Pres., Mem. Exec. Ctte., CanWest Capital Corp. 1977–83; Assoc. Prof. (Adj.), N.Y. Univ. Grad. Sch. Business Adm.; Dir., Indigo Books & Music Inc.; Vice-Chair, Mount Sinai Hospital; Mem., Ctte. on Univ. Resources, Harvard Univ. Bd. of Overseers; Dir., Gov., or Trustee of a number of other organizations, incl.: Jr. Achievement of Central Ont. and The Simon Wiesenthal Center; honours: Hon. Dir., The Bank of Nova Scotia; Officer, Order of Canada 2005; Lifetime Achievement Award (Ont.), Ernst & Young 2005; el. to Cdn. Business Hall of Fame 2006; Hon. Doctorates, Tel Aviv Univ. (Ph.D.) and St. Francis Xavier Univ. (LL.D.); recreation: sailing, tennis.





# Example Info from a SEDAR Report (ONEX Corp.)

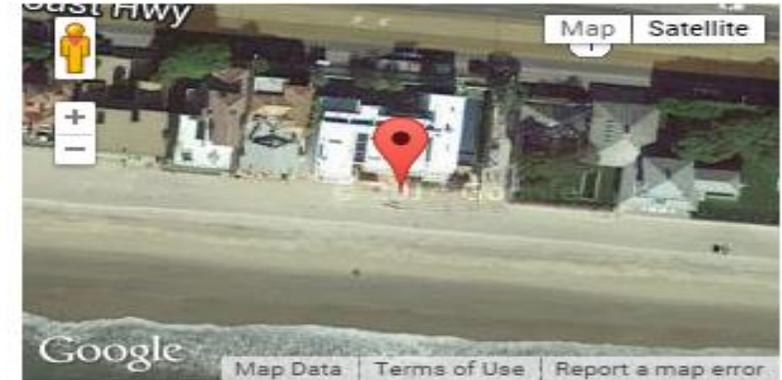
## Summary Compensation Table

Name and principal Position	Year	Salary	Share-based awards	Option-based awards (1)	Non-equity incentive plan compensation			All other compensation	Total compensation
					Annual incentive plans	Long-term incentive plans	Pension value		
Mr. Gerald W. Schwartz Chief Executive Officer	2015	US\$ 1,300,000	—	—	US\$ 6,000,000	—	—	—	US\$ 7,300,000
	2014	US\$ 1,300,000	—	—	US\$ 17,838,291	—	—	—	US\$19,138,291
	2013	US\$ 1,300,000	—	US\$59,583,828	US\$ 24,433,577	—	—	—	US\$85,317,405
Mr. Christopher A. Govan (2)(3) Chief Financial Officer	2015	US\$ 313,240	—	US\$ 487,723	US\$ 1,100,000	—	—	—	US\$ 1,900,963
	2014	—	—	—	—	—	—	—	—
	2013	—	—	—	—	—	—	—	—
Mr. Robert M. Le Blanc Senior Managing Director	2015	US\$ 400,000	—	—	US\$ 3,400,000	—	—	—	US\$ 3,800,000
	2014	US\$ 400,000	—	—	US\$ 11,913,658	—	—	—	US\$12,313,658
	2013	US\$ 400,000	—	US\$13,112,122	US\$ 9,755,158	—	—	—	US\$23,267,280
Mr. Seth M. Mersky (3) Senior Managing Director	2015	US\$ 400,000	—	—	US\$ 3,400,000	—	—	—	US\$ 3,800,000
	2014	US\$ 400,000	—	—	US\$ 22,936,543	—	—	—	US\$23,336,543
	2013	US\$ 400,000	—	US\$13,112,122	US\$ 3,794,176	—	—	—	US\$17,306,298
Mr. Anthony Munk Senior Managing Director	2015	US\$ 400,000	—	—	US\$ 3,400,000	—	—	—	US\$ 3,800,000
	2014	US\$ 400,000	—	—	US\$ 5,079,682	—	—	—	US\$ 5,479,682
	2013	US\$ 400,000	—	US\$13,112,122	US\$ 5,498,558	—	—	—	US\$19,010,680



# Real Estate Example: iWave PRO

**Owner Names:** Gerald W Schwartz  
**Property Address:** 22140 Pacific Coast HWY  
 Malibu, CA 90265-5027  
**Mailing Address:** Unavailable  
**Owner Relationship:** Unavailable  
**Phone:** Unavailable  
**Free and Clear:**  No  
**Most Recent Purchase Price:** \$19,000,000  
**Most Recent Purchase Date:** June 10, 2008



[Click to view larger map](#)

## Property Assessment Details

**Current Value:** \$7,155,027  
**Market Value:** N/A  
**Assessed Value:** \$34,797,177  
**Appraised Value:** N/A  
**Ass'd. Improvement Value:** N/A

**Tax Amount:** \$394,462  
**Tax Year:** 2013  
**Assessed Year:** 2014  
**Assessed Land Value:** \$34,797,177

## Property Information

**APN Number:** 4451-006-038  
**County:** Los Angeles  
**Property Type:** Single Family Residence  
**Year Built:** N/A  
**Effective Year Built:** N/A  
**Acres:** 0.50

**Cash/Mortgage Sale:** N/A  
**Total Rooms:** N/A  
**Total Bedrooms:** N/A  
**Total Bathrooms:** N/A  
**Garage:** N/A  
**Pool:** N/A



# Example from Realtor.ca

**REALTOR.ca** Residential Commercial

Residential For sale \$0 - Unlimited Any Any More Options

19 Listings Low to High (\$)

**1500 RICHMOND ST, Unit 91, LONDON, Ontario N6G4T9**  
 \$1,700  
 MLS® Number: 589688  
 Building Type: Row / Townhouse  
 3 4

SUTTON GROUP - SELECT REALTY INC., BROKERAGE, INDEPENDENTLY OWNED AND OPERATED Brokerage

**1510 RICHMOND ST, Unit 107, LONDON, Ontario N6G4V2**  
 \$149,000  
 MLS® Number: 582787  
 Building Type: Apartment  
 1 + 1 2

SUTTON GROUP PREFERRED REALTY INC.(1), BROKERAGE, INDEPENDENTLY OWNED AND OPERATED Brokerage

**1510 RICHMOND ST, Unit 511, LONDON, Ontario N6G4V2**  
 \$193,800  
 MLS® Number: 589931

**274 WINDERMERE Court East, LONDON, Ontario N6G4J5**  
 \$1,599,000  
 MLS® Number: 588644  
 Building Type: House  
 4 + 3 5

CENTURY 21 FIRST CANADIAN CORP., BROKERAGE, INDEPENDENTLY OWNED AND OPERATED Brokerage



# Example from ZooCasa

## Demographics

Masonville

**\$376,442**

Average property price

**4,444**

Household

**\$135,252**

Average household income

**3,911 (88%)**

Properties owned

**12,781**

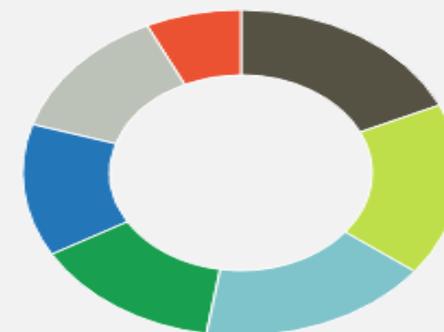
Total population

**533 (12%)**

Properties rented

### POPULATION BY AGE

■ Age 45 to 54	18%
■ Age 15 to 24	17%
■ Age 0 to 14	17%
■ Age above 65	14%
■ Age 55 to 64	13%
■ Age 35 to 44	13%
■ Age 25 to 34	7%





# Salary Estimates: Monster

**monster** [Resume](#) [Jobs](#) [Career Resources](#)

## Salary Center

[Executive Jobs in Canada](#) Browse the largest listing of \$100K plus Executive postings in Canada  
[Victimology Certification](#) Become a Victims Advocate & Support Leadership & Change. Free Gu  
[Become a Bookkeeper](#) Learn bookkeeping at home with expert training from ICS Canada. [www.ic](#)

[new search](#)

**Similar Jobs**

- [Top Government Affairs Executive \(Federal Level\)](#)
- [Account Management Manager](#)
- [Accounting Manager](#)
- [Accounts Payable Manager](#)
- [Accounts Payable/Receivable Manager](#)
- [Accounts Receivable](#)

**Salary** | **Salary + Bonus** | **Similar Jobs**

### Branch Manager I [Methodology](#)

CA National Averages

Median Salary + Bonus **C\$73,381**

Percentile	Salary + Bonus (C\$)
10%	48,036
25%	60,115
Median	73,381
75%	90,834
90%	106,725

# Ontario Public Sector Salary Disclosure (The Sunshine List)

\*Note: many physicians are cross-appt with a university & have salaries with both!

Holland Bloorview Kids Rehabilitation Hospital	BRIAN	JESSICA A.	Clinician Investigator	\$112,008.00	\$576.62
Holland Bloorview Kids Rehabilitation Hospital	CARMICHAEL	ROB	Chief, Dentistry	\$193,832.34	\$1,013.33
Holland Bloorview Kids Rehabilitation Hospital	CHAU	TOM	Senior Scientist	\$150,010.15	\$720.72
Holland Bloorview Kids Rehabilitation Hospital	FALZON	KELLY	Senior Director, Rehab and Complex Continuing Care/Chief Nursing Executive	\$119,739.10	\$762.60
Holland Bloorview Kids Rehabilitation Hospital	FEHLINGS	DARCY	Physician Director	\$292,963.13	\$1,312.74
Holland Bloorview Kids Rehabilitation Hospital	GUIMOND	MARIE-JOSEE	Director, Research Operations	\$106,623.20	\$540.54
Holland Bloorview Kids Rehabilitation Hospital	HAANSTRA	CHRISTA	Chief, Communications and Public Affairs	\$144,917.75	\$715.56
Holland Bloorview Kids Rehabilitation Hospital	HANCOCK	ROBERT	Senior Director, Facility Management	\$120,851.62	\$603.60
Holland Bloorview Kids Rehabilitation Hospital	HATTON	LINDA	Senior Director, Information Systems	\$128,705.98	\$630.68
Holland Bloorview Kids Rehabilitation Hospital	HUNG	RYAN	Physician	\$100,381.15	\$0.00
Holland Bloorview Kids Rehabilitation Hospital	HUNTER	JUDY	Vice President, Human Resources and Organization Development	\$203,496.54	\$1,506.18
Holland Bloorview Kids Rehabilitation Hospital	JARVIS	SHEILA	President/Chief Executive Officer	\$472,329.64	\$9,860.50
Holland Bloorview Kids Rehabilitation Hospital	JIMENEZ	ELIZABETH	Physician	\$165,143.94	\$761.86
Holland Bloorview Kids Rehabilitation Hospital	KAWAMURA	ANNE	Physician	\$184,670.19	\$782.54
Holland Bloorview Kids Rehabilitation Hospital	KILLEY	NANCY	Director, Organization Development and Learning	\$106,772.00	\$1,034.14



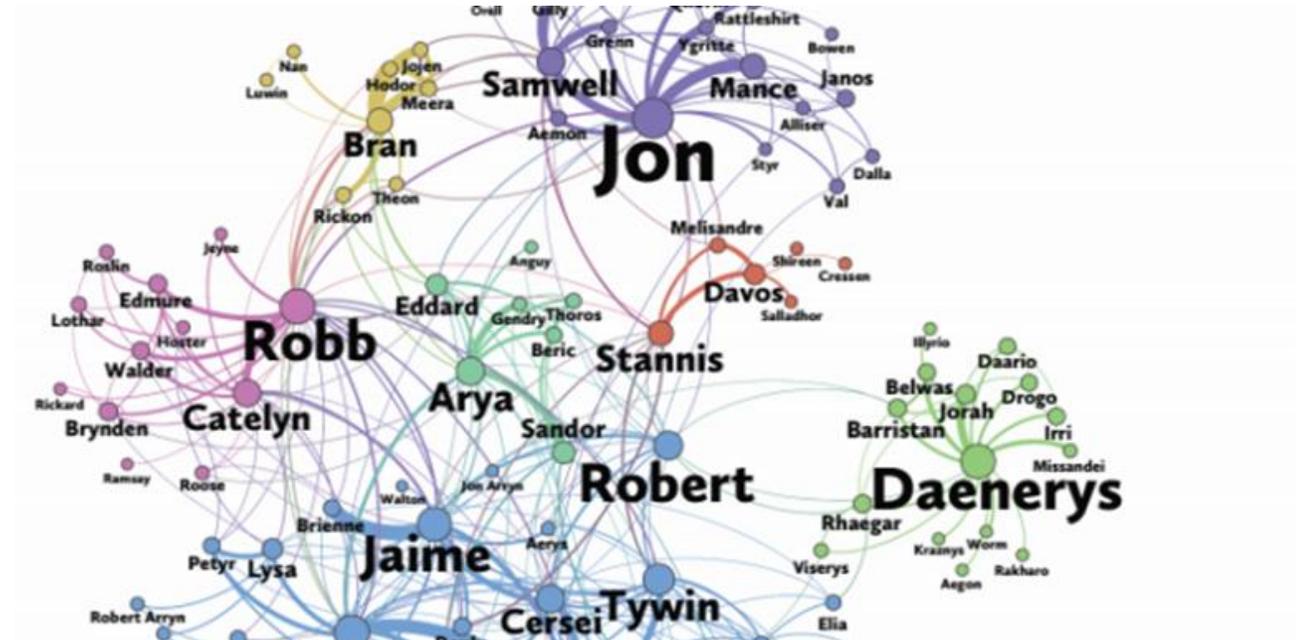
# Prospecting

- **Qualify** those currently giving to your organization
  - These could be lapsed major giving donors, mid-level giving donors, and/or donors who have given frequently at the annual giving range
  - Do they qualify to give at a major giving level, *and*, are they interested in meeting with a development officer?
  - Can you establish a scoring system for qualification?
- **Identify** those who may be potential *new* donors
  - These could be identified through your network of executives, senior volunteers, committee members, and major donors
  - Or, those who have an affinity to your organization (alumni, grateful patients, family of clients) who may not have given yet
  - Or, those who support other “like” causes
  - Or, those who have identified certain areas of support in their corporate or foundation documentation



# People, people, people!

- First and foremost! – Do research which looks within at LINKAGES to :
- Staff Members
- Board Members (key volunteers)
- e.g.) Peer Screening
- Committee Members
- Event Volunteers
- Event Attendees
- Sponsors
- Vendors
- Current Major Donors
- Advisory Groups
- Professional Groups
- And your database: RFM\*
  - \*recency, frequency, monetary





# 5 Minute Linkage Break-Out

- Pick someone around you who you don't *know well*
- Find at least one linkage or commonality
  - that doesn't include being in fundraising or being a member of the APRA!
- Examples could be:
  - What schools did you attend?
  - Where did you grow up?
  - Who are your family members?
  - What are your other interests and activities?

This is relationship building that:

- a) Is necessary in fundraising
- b) Is research
- c) Needs to be recorded

**We will do a one minute  
“share” after 😊**



# “People Resources” influence their peers!

Social Media: not just for the young at heart, or those light in the wallet!

As of the 2<sup>nd</sup> quarter of 2016...

- **Facebook** had 1.71 billion monthly active users
- **Twitter**, 313 million monthly active users
- **LinkedIn**, 450 million members
- **Instagram**, 500 million monthly active users

Source: Statistica.com



# Influence on the Affluent

Social Media influenced...	Wealthy (\$1 million+ assets)	Ultra-Affluent (\$250,000+ Income)	Affluent (\$100,000+ Income)
<b>Which stores visited</b>	<b>56%</b>	<b>49%</b>	<b>34%</b>
<b>Which designer brands purchased</b>	<b>57%</b>	<b>47%</b>	<b>31%</b>
<b>Web sites visited</b>	<b>59%</b>	<b>54%</b>	<b>41%</b>

Source: Jay Frost, 2012



# Once you have started a good list of names linked to internal resources

Then you can start researching *externally*:

- For giving to “like” organizations
- Giving through foundations
  - Fundraising interests
- Corporate giving
  - Community Giving pages
- And, individual wealth capacity
  - Look for opportunities for upgrading your donors from annual giving to major giving



# Pipeline Metrics

– how many prospects do you need?

	Identification	Qualification	Cultivation	Solicitation & Ask	Gifts & Stewardship
<b>MG Prospect Ratios</b>	11	8	4	3	1
<b># MG Prospects</b>	330	240	120	90	30
<b>Max'm Days in Stage</b>	60	120	180	180	As Donor MOU



# Relationship with the MG & Development Team

- Important to have strong, respectful relationships with your colleagues, the majority of your work will be done with and for the front line fundraisers
- Take time to understand their portfolios and goals, why should a donor support your organization
- Integrate your work with the Major Gift Work, have a voice at the meetings you attend
- Be Trustworthy, informal interactions matter, be consistent, care denotes confidence



# Relationship with the MG & Development Team

- Prove your worth – show front line fundraisers why your skills go beyond “just google it”, proactive prospecting, ask for clarification
- Take the mystery out of qualification – help front line fundraiser focus on the right names
- Understand what success means to Major Gift Staff – understand donor motivation, know the donor names & who they are
- You are also a fundraiser – raising money is a team effort



# Educate your Fundraising Team

- Do a Research “Lunch & Learn” with your team and any new fundraisers that join your organization
- Show them what “easy” resources they can access themselves and when they *need* to go to the research team for information
- Teach them stronger “google” skills
- Let them know realistic expectations regarding timelines, deadlines, and priorities
- Show them the steps on how to send a research request
  - Email?
  - Database action?
  - Request forms?



# Example of information for your Lunch & Learn: How long do research requests take?

- Highest priority goes to those prospects/solicitors with upcoming **meetings** → good head's up is appreciated!
- A **full “meal deal”** (with fries) background research request = **8 hours** (including record updated) for the researcher (does not necessarily mean that they will get it 8 hours later)  
→ depends on the queue and priority
- A **“drive through”** quick research request (e.g. update on capacity, contact person, or funding interests, etc.) = **1 hour**
- An **event/group list** requesting bio-blurbs on each attendee = *at least 2 weeks*
  - **Send attendee names as they come in the door, not all at once**
- A *list* of professionals to update into database including adding to businesses, linking with individual & organizational relationships (can you get a student or volunteer for this?)  
= ongoing as time permits
- Keep in mind the researchers have a research **queue** – fundraisers need to let them know if they have a **meeting booked** – those requests have the *highest priority*!



# What activity is expected of your fundraisers?

This relates directly to research activity, proposal writing and stewardship needs

Performance Goals for Major Gift and Planned Giving Officers				
Weekly Contact Goal for Individual Fundraiser = Total Number of Donors/Prospects Under Management divided by 4.				
<b>CONTACT (MOVES) OBJECTIVES AND MIX</b>				
(In order to provide a model, we use the number "100" as an example of the contacts under management.)				
Standard	Qualifying Contacts	Cultivation Contacts	Solicitations or Asks Needed	Stewardship Contacts
New Fundraiser	70% of Contacts (18 per week)	20% of Contacts (5 per week)	5% of Contacts (1 per week)	5% of Contacts (1 per week)
Experienced Fundraiser (3 to 5 years)	25% of Contacts (5 per week)	50% of Contacts (13 per week)	15% of Contacts (4 per week)	10% of Contact (3 per week)
Very Experienced Fundraiser (5 years and longer)	5% of Contacts (1 per week)	65% of Contacts (16 per week)	20% of Contacts (5 per week)	10% of Contacts (3 per week)
<ul style="list-style-type: none"> <li>• A reasonable target for gifts secured is 6 per month by whatever method. Depending upon the organization and the giving constituency, this could result in \$1 million per year.</li> <li>• A contact (move) has an objective. It may be accomplished by letter, telephone, or personal visit.</li> <li>• With good prospects, one contact (move) per month (12 per year) is desired, with 4 to 5 per year in the form of personal visits.</li> <li>• The number of personal visits will be somewhat determined by the geographical distribution of your contacts— the more dispersed the group, the more likely the difficulties in making the 4 or 5 personal contacts a year.</li> </ul>				

2004

Jerold Panas, The Institute for Charitable Giving



# Media Monitoring

- A distribution of external information relevant to the activities of your organization
- Fills an information void, keeps the office up to date
- Can take on a variety of formats: e-mail, newsletter, share point item
- Frequency – can vary usually daily
- What will it look like – full article or links to articles or summaries of articles
- Shows development research beyond the reactive profile
- Helps with prospecting



# Media Monitoring - Content

- Your organization
- Volunteers and top donors
- Potential / Current Prospects (including top lists)
- Gift Announcements / Campaign News / Sector News
- Industry / Business News
- Trends in the sector you operate in



# Media Monitoring - Drawbacks

- Time Consuming
- Potential costs
- Alert fatigue - not another e-mail
- Expectations of arrival by the team
- Knowing what to do with the information beyond inclusion in the report



# Media Monitoring – TG&WHF process

- Research Reporter Daily, to all Foundation Staff (Tues – Fri. by 10 am, Monday by 11am)
- Headline, lead paragraph, insert of relevant information, link to story online or \*full text available to subscribers only, see research for full story
- Physical papers – Toronto Star, Globe& Mail, National Post
- Variety of Magazines, many via nextissue
- Alerts via FP Infomart & Google
- RSS via Feedly
- Foundation Flash

**Note:** Print still includes more info than online, esp. gift announcements, and stewardship/campaign thank-you ads and events



# Media Monitoring - Sources

- Online news, media scans, RSS Feeds → Reader (e.g. [Feedly.com](http://Feedly.com) – push)
- Regional Newspapers & Magazines
- National Newspapers & Magazines
  - Globe & Mail
  - National Post & Financial Post
  - Canadian Business
- Regional Directories
- Public (& university) libraries
- TSX & Dow Jones (what's trending)
- Chronicle of Philanthropy (US online)
- Canada411 (online) – Reverse Look-Up
- Google – News alerts, Street View
- StatsCAN reports & tables
- And many more...





# Time Management & Work Log

- Track what you are doing and what is coming up
- Simple system that is easy to maintain
- Should include:
  - Date Requested
  - Date Due (Date Completed)
  - Requested By
  - Requested For
  - Request Type (Bio, event brief, full profile, update, wealth & philanthropy, prospecting project “reference question”, etc )
  - Request Details if a meeting is booked when is the meeting
  - Rush
  - Status – open, completed, on hold
  - If more than one person shop, who received the requests and who is assigned to the request



# Research Beyond the Profile

- Research requests come from multiple sources (especially if you are a one-person shop)
  - Development Officers, Directors of Development, CEOs, Board & Committee Members, Event Planners, Proposal Writers, and so on...
- Research requests go far beyond the profile and can include:
  - Environmental scans (demographics, economy, fundraising climate)
  - Fundraising Trends
  - Cause-related marketing
  - Benchmarking (regarding fundraising *and* research)
  - Celebrities and wealthy Canadians with... {insert condition here}
  - How to purchase Red Nike Tennis Shoes only available in Spain



# Be a Rock Star - Skills to Excel At



- Excellent command & understanding of your donor database
- Strong internet searching skills
- Understanding of your main resources
- The “Reference Interview” – find out what the requestor really wants
- How to say no without saying no
- Remember the names of your donors and the main players in your area, this will come in time
- Get to know your peers at other organizations
- Be approachable and eager to help



# Questions & Discussion & Hand-Outs





# Our contact information

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