

Charting our own Course

Relationship Mapping & Lesson Learned



Tim Wowk, Associate Director, PRCDM
Amber Palmer, Research Analyst

SESSION DATE: Thursday, October 12, 2016

SESSION TIME: 1:30-2:45pm

Overview

1. Introduction

- What is Relationship Mapping?
- Its Origins
- Its Importance to Fundraisers/Advancement

2. The Queen's Experience

- Mapping at Queen's
- Implementation & Challenges
- The First Year & Performance to Date

3. Impact

- How Maps are Used
- Deciphering ROI
- What Users are Saying

4. Demonstration

- Prospects by Class
- Corporate Maps
- Cabinet/Council Maps

5. What We've Learned so far

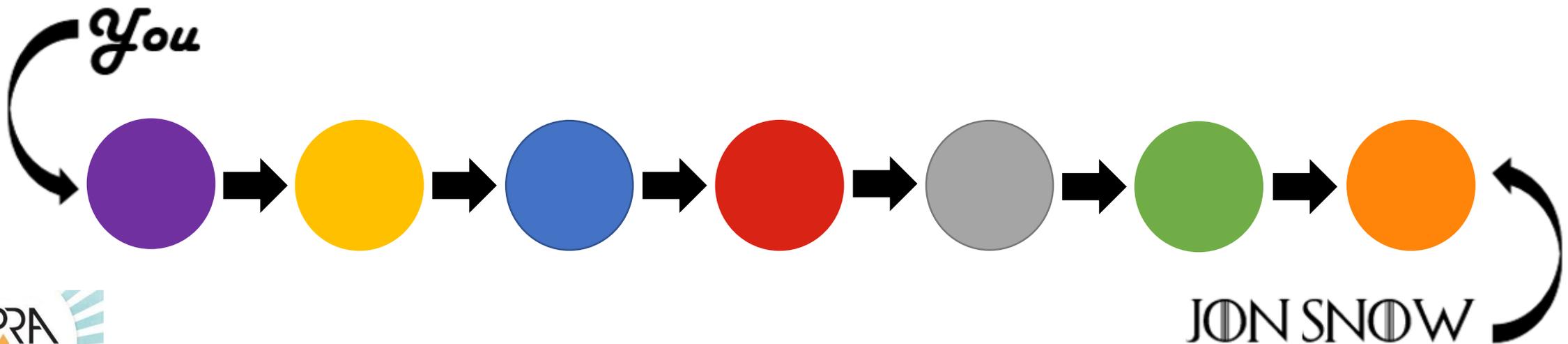
- Mapping integration
- Data Integrity
- Programming

6. Questions

7. Sources & Additional Resources

Origins

- Six Degrees of Separation Theory (Stanley Milgram, 1967)
 - The basic principle behind this theory is that everyone in the world is connected through a chain of six people.
 - The six degrees of separation theory gained traction in the 1980s and is better known today as relationship mapping.
- Today, some new studies suggest that the number of steps separating any two people in the world may be less than six.



Its Importance to Fundraisers

The Value Proposition

- Provides a visual image of the connections between donors, prospective donors and other constituents.
- Provides an opportunity to present more information, more efficiently and with greater context than text-based documents.
- Can help show the importance of relationships (i.e., who knows who and in what context, and who are the key influencers).
- Visual representation of “similar” individuals in “similar” positions with shared networks.



The Game of Influencers

Leveraging **Social Capital** - Social capital operates under the important premise that **“relationships matter”**.

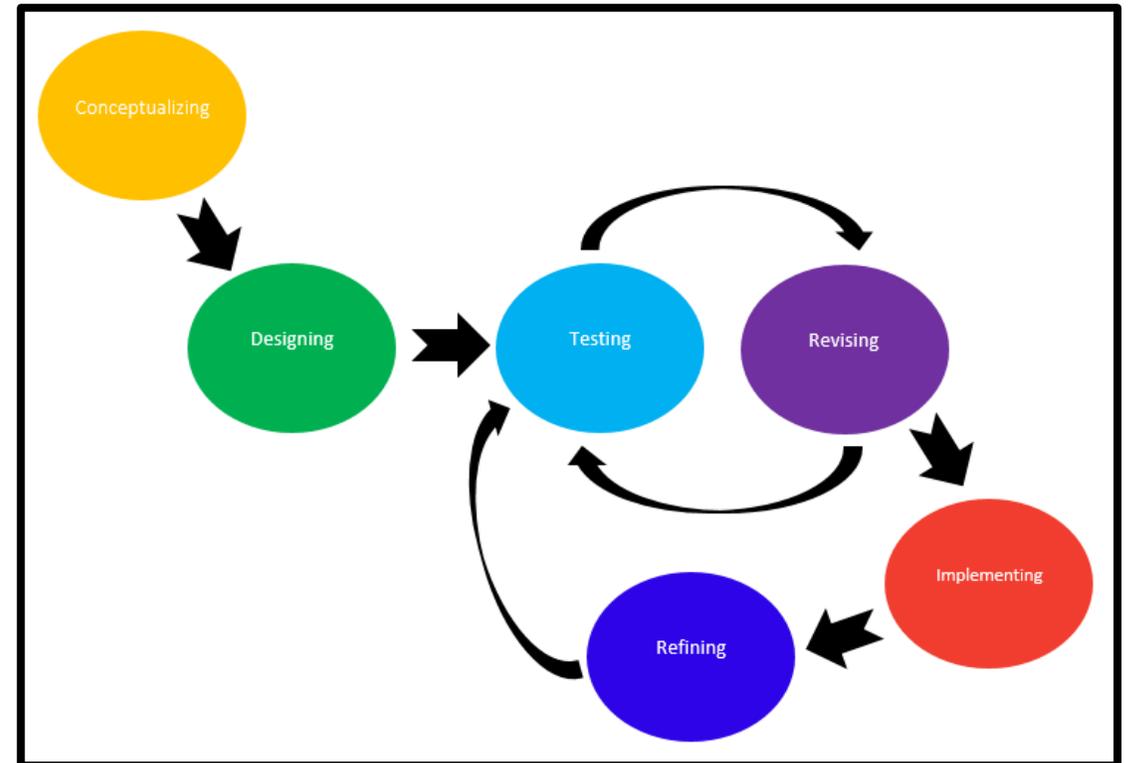


- Comprised of interconnected networks of people that possess shared interests or goals.
- It is through these networks that individuals have the potential “to achieve things that they either could not achieve by themselves or could only achieve with great difficulty”.
- **Thus, “the more people you know, and the more you share a common outlook with them, the richer you are in social capital”.**

The Queen's Experience From theory to Practice

From Theory to Practice

- Began thinking about how to apply relationship mapping techniques to our research and fundraising activities in 2009.
- Engaged in a number of small trials prior to proceeding with a large proof concept test in 2010.
 - Received positive feedback from testing.
- Focus on mapping major gift prospect pool and utilizing our alumni database.



Implementation Plan

Goals

Leverage relationship
Identify new prospects

Selecting a Program

DIY vs. premade mapping tools
Time consuming process

TouchGraph

DIY mapping product
Marketed as a “data visualization tool” with a focus on creating “clear & intuitive interfaces”.

User Friendly

Colour-coded relationship types to assist end-users
Provided training sessions

Identified Key Affiliation Types

Cabinet/Advisory Board
Board of Trustees
Screening Contact / Friend
Queen’s Degree
Company
Directorship
Community Volunteer

Challenges

Need for technical support

- Integrating and customizing TouchGraph is a more technical process than initially envisioned.
- Creating a direct link from our alumni database to TouchGraph.



Resourcing

- Finding the time to meet with IT team and the developers of TouchGraph.
- Extensive time required to thoroughly test product updates.

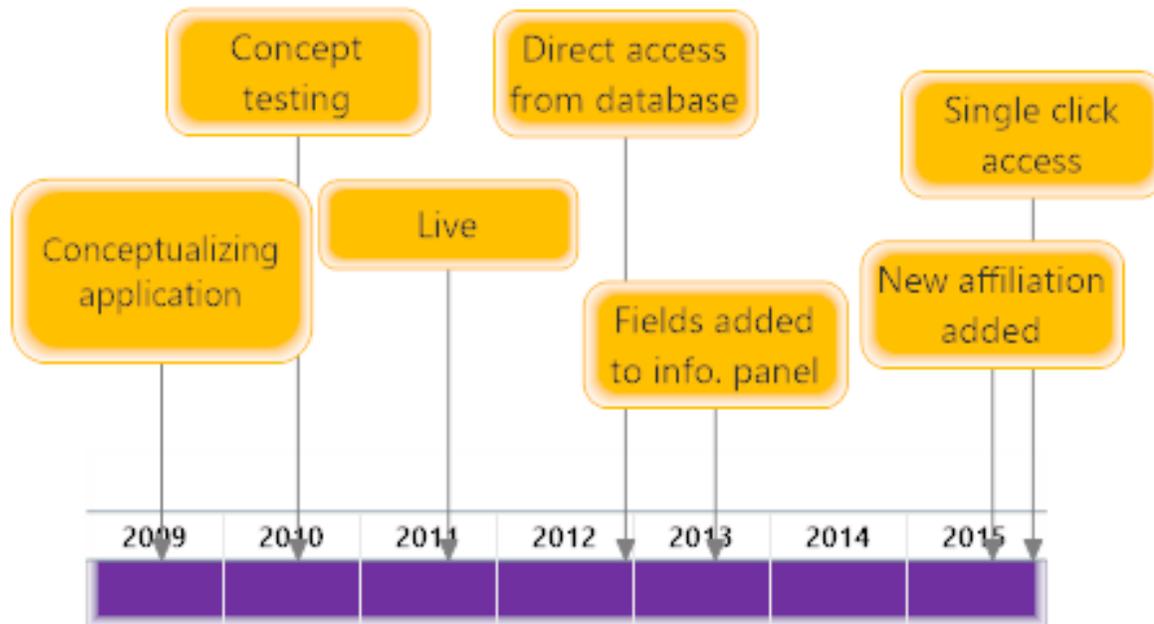


Relevant to Queen's

- Inhouse vs. Commercial
- Determining which affiliations types would be pulled into the mapping program.



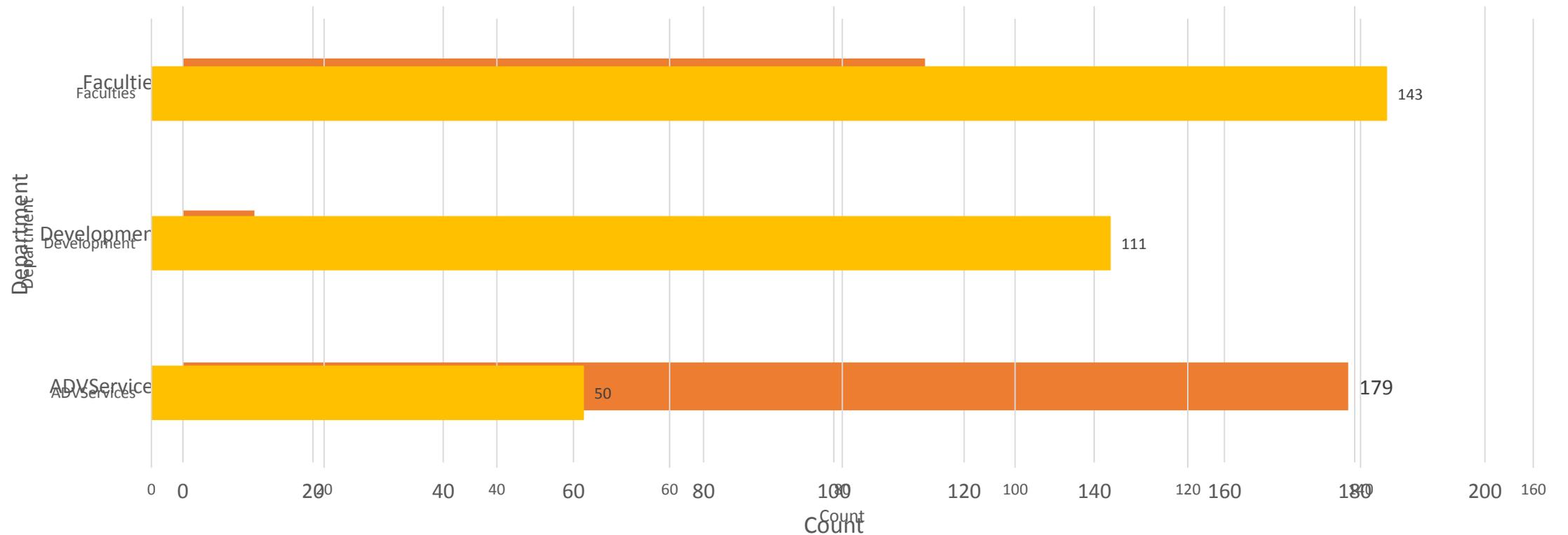
Up & Running



- Live with the relationship mapping program in March 2011.
- In the first month after it went live, maps were accessed 33 times by 16 unique users.
- Significant traction at senior executive level
 - Important – needed buy-in of this group if we were going to be successful.
- Need to Manage Expectations
 - “Can we Map Everyone?”

By the Numbers The First Year

By the Numbers - Creator (APR-DEC 2012) (Est.)
By the Numbers - End User (APR-DEC 2012) (Est.)



The First Year

What we didn't expect:

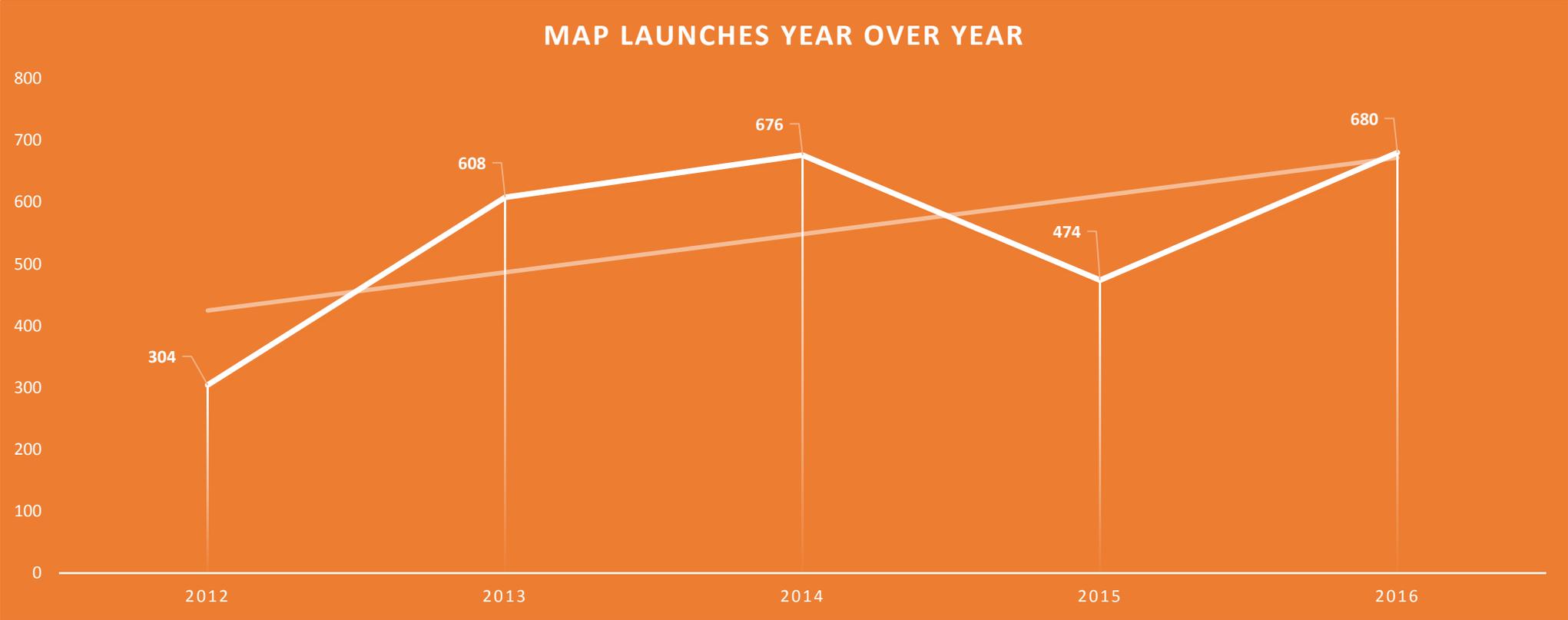
More self-serve
Request for expanding map database
Print vs. online

Reception

Well-received
Broad-based support for mapping program
A picture is worth a thousand words

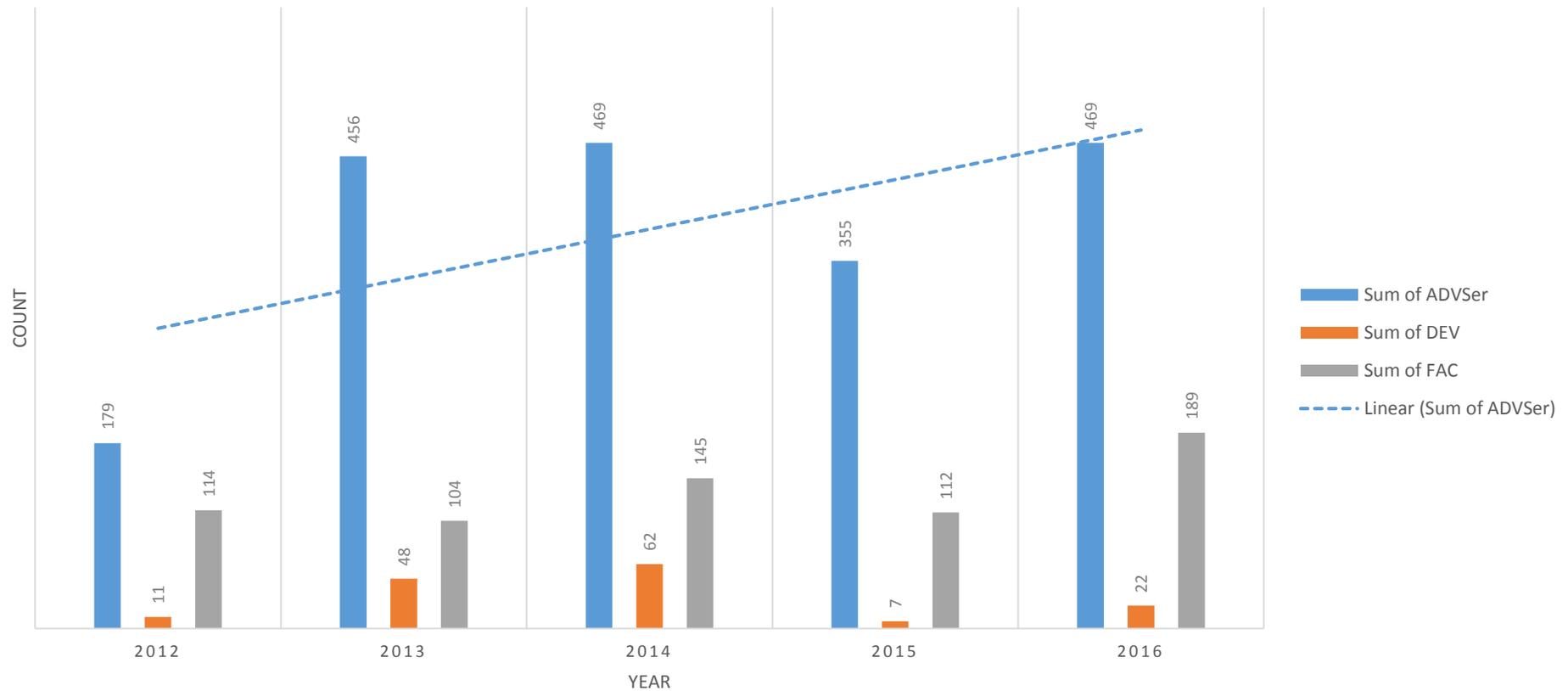


Performance to Date Launches



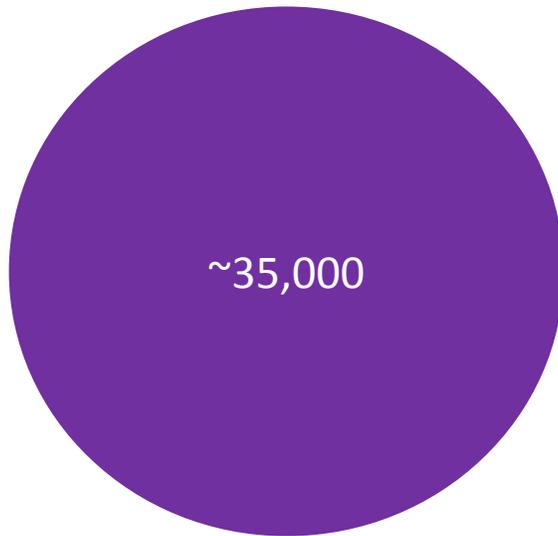
Performance to Date By Group

MAP LAUNCHES BY DEPARTMENT (2012-2016)



Performance to Date

The Data



- Today, we have over 7,000 mapped records – 2,000+ more mapped records than when we launched in 2012.
 - Added ~500 entities/year
 - Mapped entire major gift prospect pool
 - Nightly automated database updates
 - Identified 35-40K unique relationships

How Maps are used ...

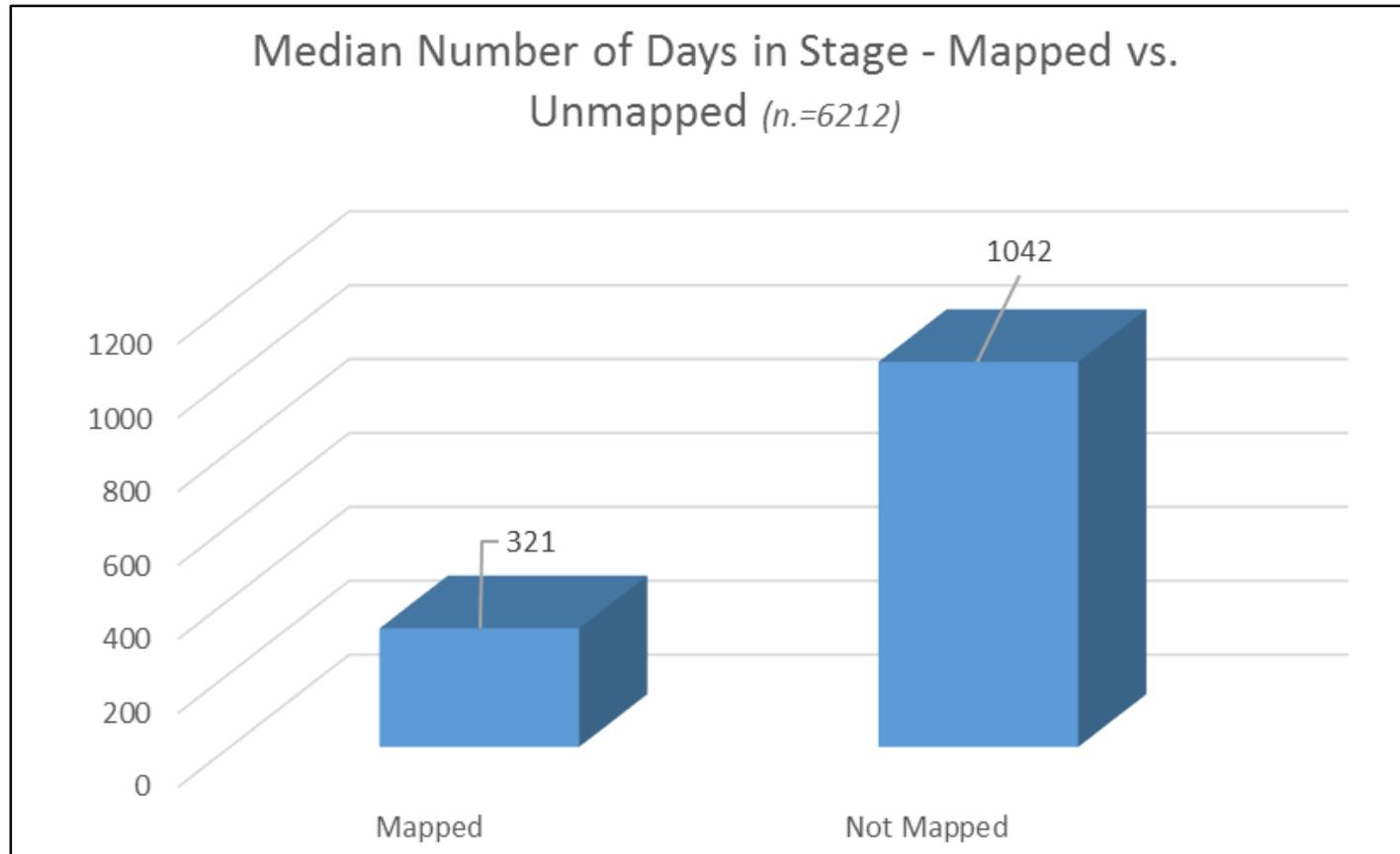
By Researchers

- Identification of high net worth prospects.
- To support faculty outreach efforts.
- Provide background information for fundraiser visits.
- Locate 'spheres of influence' or 'gatekeepers' to assist in strategy development.

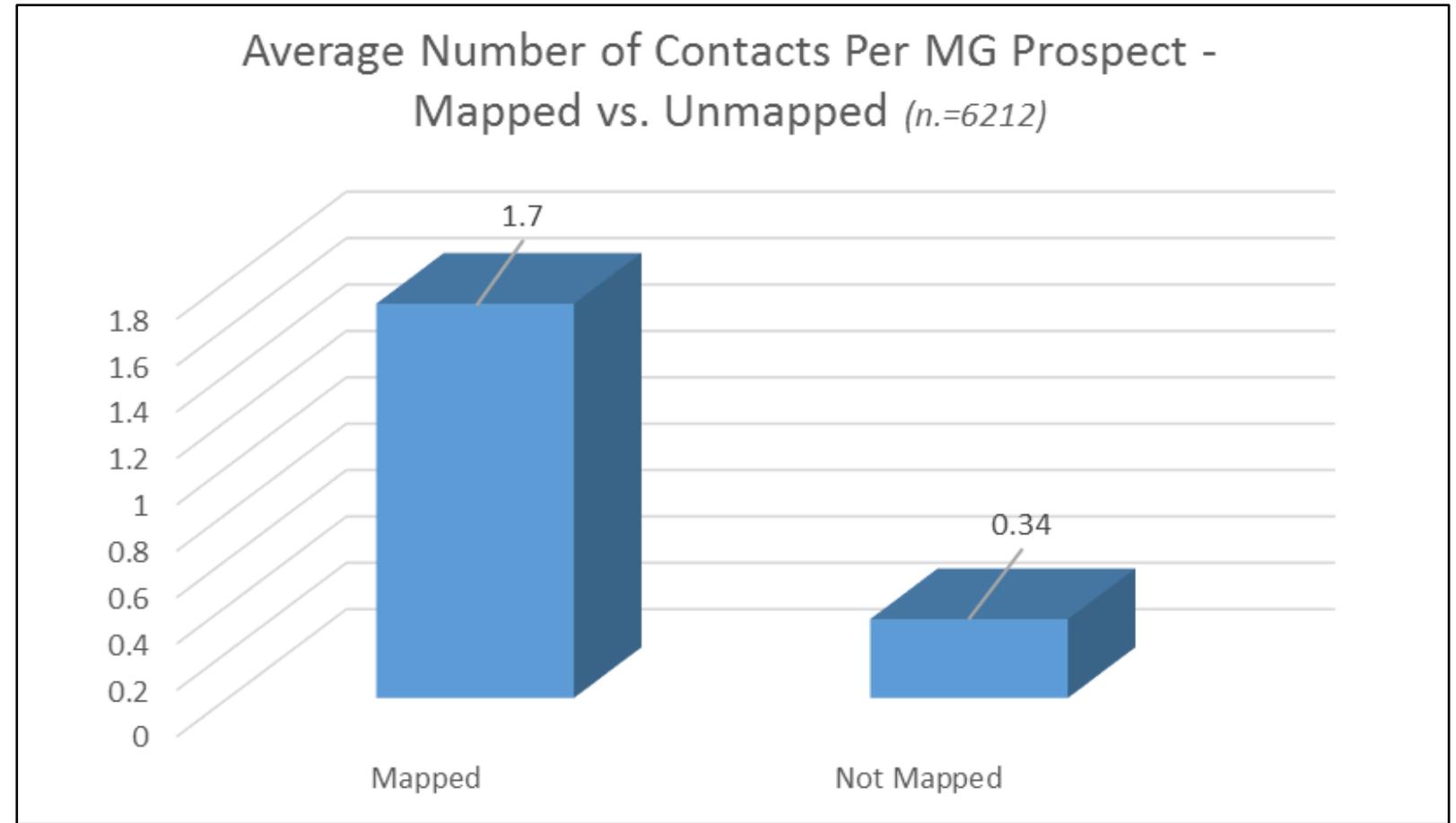
By Fundraisers

- At Cabinet Meetings to assist in the identification of potential volunteers.
- Identification of alumni connections (internationalization efforts).
- Development of prospect strategies.

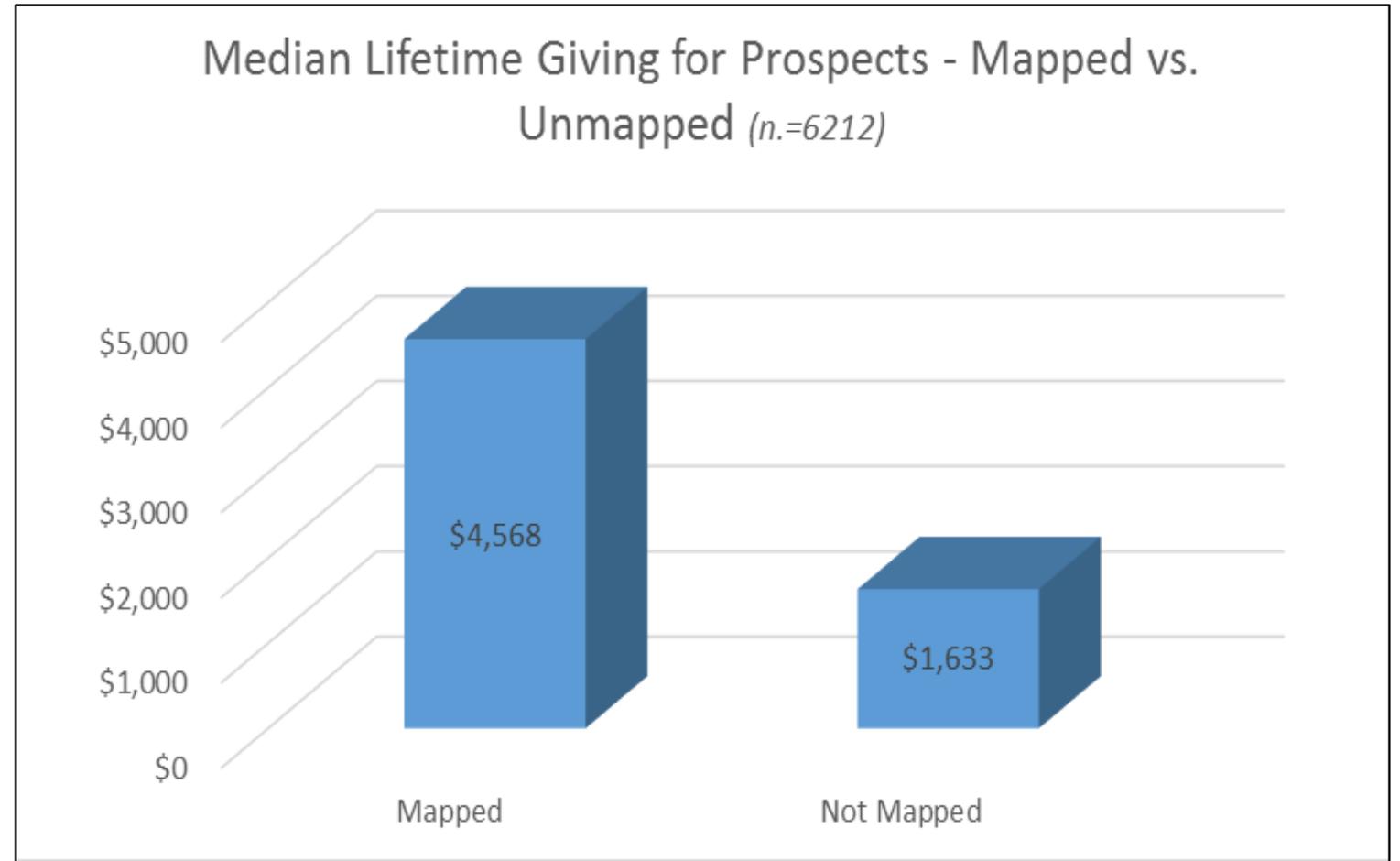
Impact of Mapping Prospect Stage



Impact of Mapping Prospect Contacts



Impact of Mapping Median Lifetime Giving



What Users Are Saying...



Relationship Mapping



I have used the relationship mapping exercise on numerous occasions. I have been amazed at the links to many individuals and corporations that I had had no point of reference to in managing certain prospects. The links established allowed me to develop a better understanding of the connections my prospects had – again creating a different window view for me as a DO.

-Patty McHenry, Principal Gifts Officer, Queen's University

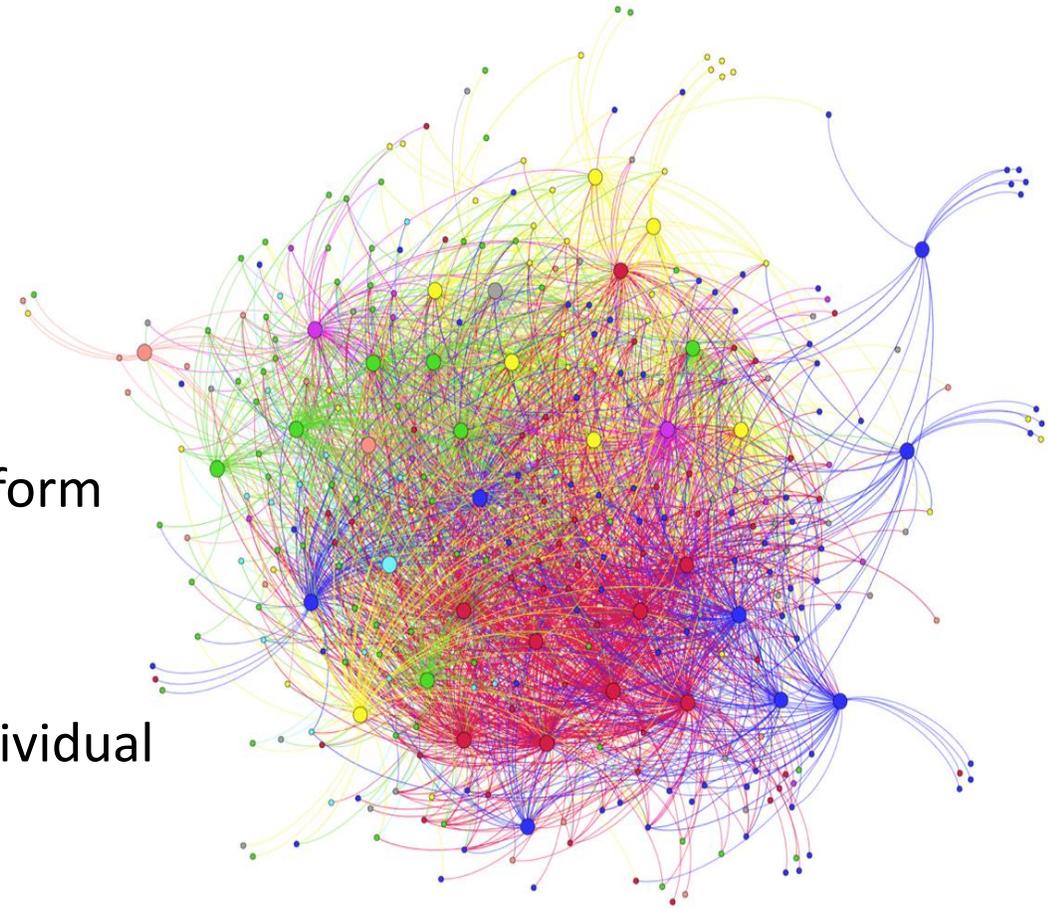
The relationship mapping program offers a unique opportunity to visualize the vast connections that exist within our database. It has greatly assisted in the development of high-level strategy for top prospective donors, by identifying potential volunteers that can 'open the door' or provide us with some background information about a prospective donor. Though I regularly use the maps for strategy meetings, they could be improved by pulling in multiple degree affiliations as opposed to just the preferred degree.

-Allison Slopack, Senior Development Officer, Faculty of Arts & Science, Queen's University

Demonstration

- Prospects by class
 - One of our more popular searches
- Cabinet/Council
 - Smith Global Council
 - Presenting complicated information in a visual form
- Corporate Maps
- Linking relationship maps
 - Determining connections between multiple individual maps.

<http://stage.adv.queensu.ca/~sf88/touchgraph-demo/SampleExcel.php>



What We've Learned so far



- Relationship mapping can be a powerful tool for visualizing relationships, identifying centres of influence and assisting in the identification of new prospects.
- Board-base appeal, but beyond the “Cool” factor, you need to develop a plan for integrating maps into the Development / Alumni process. Things to consider:
 - Creating demand for a new tool - Push vs. Pull?
 - How to incorporate maps into prospect/regional strategy discussions?

What We've Learned so far

- Requires expertise on the programming side.
- Technological programs can wreak havoc on the best of plans.
- The maps are only as good as your database:
 - Keeping data up-to-date
 - Consistency of data entry
 - Ongoing communication with programmers to clarify and expand parameters.



Questions?



Timothy Wowk, Associate Director, Prospect Research & Constituent Data Management

Amber Palmer, Research Analyst, Prospect Research



Sources & Additional Resources

Beveridge, A. & Shan, J. (2016). Network of Thrones. *Math Horizons*, 23(4), 18-22.

Brown, E. & Ferris, J. (2007). Social Capital and Philanthropy: An analysis of the impact of social capital on individual giving and volunteering. *Nonprofit and Voluntary Sector Quarterly*, 36(1), 85-99.

Field, J. (2003). *Social Capital*. New York: Routledge.

Monitor Institute. (2010). *What's next for philanthropy*. San Francisco, CA: Fulton, K., Kasper, G. & Kibbe, B.

Watts, D. (2003). *Six Degrees: The science of a connected age*. New York: W.W. Norton & Co. Inc.



Websites

<http://www.touchgraph.com/navigator>

<https://cooldata.wordpress.com/2010/04/13/exploring-your-database-relationships-with-nodexl/>

<http://www.jenniferfilla.com/relationship-mapping-for-new-prospects/>

<https://www.philanthropy.com/article/Tips-on-Choosing-a/152251>

<http://www.orgnet.com/sna.html>

<http://www.kstoolkit.org/Social+Network+Analysis>

<http://flowingdata.com/>