Partners in Dime
How Advancement Professionals can benefit from Research

Thursday, May 30, 2019
Oh, hello!

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Advancement Officer

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Partners in Dime

How Advancement Professionals can benefit from Research

Thursday, May 30, 2019
Sunnybrook by the Numbers

• 1.2 million patient visits

• Our nine strategic program areas:
  o The Holland Bone and Joint Program
  o The Integrated Community Program
  o The Odette Cancer Program
  o The Aubrey & Marla Dan Women & Babies Program
  o The Tory Trauma Program
  o The Veterans Program
  o St. John’s Rehab Program
  o Schulich Heart Program
Sunnybrook Foundation by the Numbers

• Philanthropic target: $75 million
• Major Gift = $25,000+
• Full time staff: 66
  o 2 full time Researchers + Director
  o 10 full time Advancement Staff + EVP + CEO
Importance of Research to Advancement

- Feel better prepared
- Feel more knowledgeable
- Armed with more meaningful strategy

Raise more MONEY!
The Research Team Evolution

Then: 2 Researchers
- Reactive profile creation
- One-way communication
- No feedback or recognition
The Research Team Evolution

Now: 2 Researchers
- Emphasis on information sharing
- Go beyond the profile – push connections and build strategy
The Partnership

• **Research Snapshots:**
  - Connections
  - High level biographies
  - Foundation associations and affiliations
  - Contact history
The Partnership

• **Moves Management**
  - Comprehensive view of portfolio
  - Strategically move through donor cycle
  - Meaningful actions
  - All prospects discussed three times per year
The Partnership

YOU GET A PARTNERSHIP

EVERYONE GETS A PARTNERSHIP

MONEY

MONEY EVERYWHERE
The Partnership

• Weekly Meetings:
  o Portfolio Review
  o Top 10 names with an action suggestion
  o Proposal Review
  o Outstanding Action Review
  o Names that require research
  o Past and Upcoming Meetings review
  o Physician Meeting preparation

• Everyday Interactions:
  o BCC Research to update action in Raiser’s Edge
  o Help with strategies and proofing emails/fact checking

Partnership Small Shop Tip:
• Meet bi-weekly
• Bring 5 names forward for a strategy touch-point discussion
• Remember: all points of contact can make a big impact!
The Partnership

• Reports, reports, reports!
  o Weekly Actions Report
  o Call Confirmation Report
  o Major Gift Notifications
  o Contact Reports

No Researcher? No problem!
• Keep track of actions in shared locations with date stamps
• Create work plans for your donors and keep on schedule
Media Review

- Factiva
- Feedly/RSS Feed
- Competitor websites
- Newspapers

No Researcher? No problem!
- Do it yourself!
- Use databases to help
- Takes an hour per day
- Use for strategic points of contact
No Researcher? No Problem!

Three quick tips to get you started:

• Subscribe to a database (iWave, CharityCan)
• Embrace Research Highlights
• Wealth Ratings
Welcome back, Jennifer!

New Relationship Graph Engine

Today we're announcing that we've supercharged the engine that powers our relationship mapping features. A lot of those changes have happened under the hood here at CharityCAN, and aren't immediately apparent. While you can't see some of the differences to the platform yet, we're also announcing the first of the new features that this new engine enables: the ability to modify a saved profile's relationship map by adding or removing charity and corporate board positions.

Since our relationship maps are built on these charity and corporate board connections, as you add and remove board positions, you'll see the saved profile's relationship map update in real time.

Read more about these new changes on our blog!

FullContact Enrichment Data and Organization Integrated Search

We've got two new features to announce today: FullContact Data Enrichment and Organization Integrated Search!

The first feature is all about bringing enriched contact data to your personal prospect profiles and company profiles via FullContact: just search using your prospect's email, phone number, or twitter handle, and FullContact will provide you with a quick view into your prospect via their top social media sites, work and location information, and even some interest keywords. We're also using this new data to enrich our company profile pages with summaries there too, where available.

If you're asking where the company profiles are, you're not alone - in adding the FullContact data we realized there was no good way to find these company pages! To solve that problem, we've created an Integrated Search for organizations which gets you donation records, charity and company profiles, and Zoominfo company results all in one place.

For more information, you can read our blog posts linked above, or get in touch to find out more!

Personal Prospect Profiles

Today we're announcing a new way of using prospect profiles in CharityCAN! Instead of just viewing our automatically created profiles, you can now save them to your own workspace for easy access for you and your team.

Once a profile has been saved to your workspace, you can start adding donation records search results to it to give your team a verified view into their giving history.

We've also added the ability to export any prospect profile, saved or otherwise, in a Microsoft Word document format, and improved the look of profiles when they're printed directly from the website. This will let you get a headstart on your profile creation and make sure you'll always have the most up-to-date information on a profile at your fingertips.

This is just the start of our work on personal prospect profiles, so stay tuned for more announcements and please get in touch if you have any questions or want a quick tour of the feature!
CharityCan

Canadian Who's Who Search

Keywords

Honours And Education

Educational Institution

*Exclude "University" or "of" e.g. search for "Toronto" only

Credentials, Honours

P.C., O.C., M.A., LL.D., etc.

Career

Occupation

Birth City

Language

Employer

Publication:

Active

Any - includes current and archived biographees. Active - includes only biographees appearing in most recent print edition.

Archived - includes previous biographees who do not appear in most recent print edition.

Status:

Living

Any - includes living and deceased biographees.
### Biography of Seymour Schulich

**Mr. Seymour Schulich, O.C., B.Sc., M.B.A., C.F.A., C.B.H.F.**

- **Last Edited:** 2015-01-11
- **Publication Status:** Active

#### Personal History
- **Marital Status:** Married
- **Spouse:** Married Tamara
- **Children:** Deborah, Judith

#### Languages
- English, French

#### Education
- McGill Univ., B.Sc., 1961
- McGill Univ., M.B.A., 1965
- Univ. of Virginia, C.F.A., 1969

#### Career
- **Occupation:** merchant banker, investor, philanthropist
- **Positions:**
  - **Current:** Chair and C.E.O., Nevada Capital Corp. Ltd., and Dir., Chair, Newmont Capital Ltd.
  - Philanthropist: Merchant Banking Div., Newmont Mining Corp.; entrepreneurial career, Shell Oil Co., Eastern Securities Ltd., Beutel, Goodman & Company Ltd. 1968-1990 (rose to Partner, Vice-Pres., Pres.);
  - Co-Founder (with Pierre Lassonde), Chair, Co.C.E.O., Franco-Nevada mining Corp. 1983-2002, merged with Normandy Mining Ltd. of Australia and Newmont Mining Corp., creating Newmont Mining Corp.;

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**Canadian Who's Who Format**


Search All Databases Simultaneously With 360search

The Integrated 360search allows you to search across all of iWave’s databases simultaneously with a single click. It instantly brings together leading philanthropic, wealth, and biographical information on your prospects and donors.

Search Tips:
- Less is best – we recommend starting with a name and then adding a State/Province
- Customize default data sources in ‘Preferences’
- Build a prospect Profile from your search results by selecting records and clicking ‘Add to Profile’
### Property Information

- **Owner Name(s):** Allan G Mutchnik
- **Property Address:** 1130 Schuyler RD
  - Beverly Hills, CA 90210-2551
- **Mailing Address:** 300 S, Grand AVE Unit 3/400
  - Los Angeles, CA 90071-3137
- **Owner Relationship:** N/A
- **Free and Clear:** No
- **Most Recent Purchase Price:** $39,352,890
- **Most Recent Purchase Date:** February 14, 2005

#### Property Assessment Details

- **Current Value:** N/A
- **Market Value:** N/A
- **Assessed Value:** $46,894,530
- **Appraised Value:** N/A
- **Assd. Improvement Value:** $9,662,028
- **Assd. Land Value:** N/A
- **Tax Amount:** $533,761
- **Tax Year:** 2016
- **Assessed Year:** 2017
- **Assessed Land Value:** $37,232,502

#### Other Information

- **APN Number:** 4350-005-008
- **County:** Los Angeles
- **Type:** Single Family Residence
- **Year Built:** 1955
- **Effective Year Built:** 1957
- **Acres:** 10.19
- **Building Sq. Feet:** N/A
- **Living Sq. Ft.:** 25,437
- **Universal Sq Ft:** 25,437
- **Number of Stories:** 2.00
- **Number of Units:** N/A
- **Cash/Mortgage Sale:** Cash
- **Total Rooms:** 23
- **Total Bedrooms:** 13
- **Total Bathrooms:** 12.00
- **Garage:** N/A
- **Pool:** Type Unknown
- **View:** CITY
- **Location Influence:** N/A
- **Number of Buildings:** 1
- **Land Use:** SFR
Your organization has 7,662 PROscore credits available.

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No Researcher? No Problem!

Three quick tips to get you started:

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The Partnership

- **Steps to success:**
  - Time
  - Flexibility
  - Finding balance
  - Communication
Metrics & Results

Number of Donor Meetings

2016-2017: 66
2017-2018: 134
Metrics & Results

Number of Other Advancement Actions

- 2016-2017: 225
- 2017-2018: 1,046
Metrics & Results

% of Portfolio Moved Forward in the Pipeline

- 2016-2017: 13.62%
- 2017-2018: 30.82%
Metrics & Results

Amount Raised ($)

2016-2017: $429,506
2017-2018: $2,444,200
Key Takeaways

- Show Research Team their value
- Communication is key
- Knowledge Sharing
- Strategic moves management
- Metrics
- Meetings

Knowledge Sharing Small Shop Tip:
- Choose 1-2 reports to discuss with leadership.
- Start small and build from there!

No Researcher? No problem!
- In lieu of meetings, create your own Donor Cheat-Sheet!
Questions

THANK YOU FOR LISTENING!

ANY QUESTIONS?
Oh, thank you!

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