

Partners in Dime

How Advancement Professionals can
benefit from Research

Thursday, May 30, 2019

Oh, hello!

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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:
 - The Holland Bone and Joint Program
 - The Integrated Community Program
 - The Odette Cancer Program
 - The Aubrey & Marla Dan Women & Babies Program
 - The Tory Trauma Program
 - The Veterans Program
 - **St. John's Rehab Program**
 - **Schulich Heart Program**

Sunnybrook Foundation by the Numbers

- Philanthropic target: \$75 million
- Major Gift = \$25,000+
- Full time staff : 66
 - 2 full time Researchers + Director
 - 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



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The Partnership

- **Weekly Meetings:**

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

- **Everyday Interactions:**

- BCC Research to update action in Raiser's Edge
- 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!**
 - Weekly Actions Report
 - Call Confirmation Report
 - Major Gift Notifications
 - 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

- HOME
- CHARITY RESEARCH TOOLS
 - CHARITY SEARCH
 - SAVED SEARCHES
 - MY CHARITIES
 - SAVED COMPARISONS
- PROSPECT PROFILES
 - MY PROSPECT PROFILES
 - PROSPECT PROFILE SEARCH
- PROSPECT RESEARCH TOOLS
 - INTEGRATED SEARCH
 - CANADIAN WHO'S WHO
 - DONATION RECORDS
 - POLITICAL DONORS
 - CORPORATE CANADA
 - THOMSON REUTERS
 - ZOOMINFO
 - PUBLIC SECTOR SALARIES
 - CHARITY DIRECTORS
 - RELATIONSHIP PATHS
 - HOUSEHOLD DATA
- SAVED SEARCHES <
- SAVED RESULTS <

Welcome back, Jennifer !

New Relationship Graph Engine

October 4th, 2018

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

May 24th, 2018

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

March 12th, 2018

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!

- HOME
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 - HOUSEHOLD DATA
- SAVED SEARCHES <
- SAVED RESULTS <

Q Canadian Who's Who Search

Keywords

Keywords

Personal Information

Last Name

First Name

* Exclude Initials

Birth City

Current City

Language

Publication:

Any - includes current and archived biographies.

Active - includes only biographies appearing in most recent print edition.

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

Status:

Any - includes living and deceased biographies.

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

Employer

Biography of Seymour Schulich

PRINT

ADD TO PROFILE

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 Tanna

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., Mewmont 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. 1985-2002, merged with Normandy Mining Ltd. of Australia and Newmont Mining Corp., creating Newmont Mining Corp.-

Canadian Who's Who Format

SCHULICH, Seymour, O.C., B.Sc., M.B.A., C.F.A., C.B.H.F.; merchant banker, investor, philanthropist: b. Montreal, Que. 6 Jan 1940; m. Tanna; children: Deborah, Judith; e. McGill Univ. B.Sc. 1961, M.B.A. 1965; Univ. of Virginia C.F.A. 1969; CHAIR AND C.E.O., NEVADA CAPITAL CORP. LTD. and DIR., CHAIR, NEWMONT CAPITAL LTD., Philanthropist: Merchant Banking Div., Mewmont Mining Corp.; entrepreneurial career, Shell Oil Co., Eastern Securities Ltd., Beutel, Goodman & Company Ltd. 1968-90 (rose to Partner, Vice-Pres., Pres.); Co-Founder (with Pierre Lassonde), Chair, Co-C.E.O., Franco-Nevada mining Corp. 1985-2002, merged with Normandy Mining Ltd. of Australia and Newmont Mining Corp., creating Newmont Mining Corp.; author: *Get Smarter: Life and Business Lessons* 2007; honours: Mem., Order of Canada 2000, Officer 2012; inductee Cdn. Bus. Hall of Fame 2011; benefactor of num. Cdn. and foreign universities, incl. \$26 million to Univ. of Western Ont., Schulich Sch. of Business, York Univ., Schulich Heart Ctr., Sunnybrook and Women's College Health Sci. Ctr. (Toronto), Library of Science and Engrn., McGill Univ., student res. and chem. hall, Univ. of Nevada; more than 7,000 student scholarships awarded in Canada and Israel through Schulich Leader Scholarships, United Jewish Appeal Fdn. of Greater Toronto.





PROscreen

PROfiles

Get Score NEW

7,662/15,000 credits available

Search for people...

Home NEW

360search

ZoomInfo

RelSci

Dun and Bradstreet

DatabaseUSA BETA

Donations

Real Estate

Prospects of Wealth

Thomson Reuters

Insider Filings

Political Giving

Foundations/Charities

Matching Gifts

People

Company

Alumni

Search

Clear

Name:

e.g. John Smith

all

Country:

Not a required field

State/Province:

Not a required field

Data Source

Multinational

☒ ZoomInfo

☒ RelSci

☒ Dun and Bradstreet

☒ Thomson Reuters

☒ Insider Filings

United States

☒ DatabaseUSA BETA

☒ Donations

☒ Real Estate

☒ Prospects of Wealth

☒ Political Giving

☒ Foundations/Charities

Canada

☐ Donations

☐ Political Giving

☐ Foundations/Charities

360SEARCH

View Video Tutorial

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'

United States

Canada

Search

Clear

Name:

all

Country:

United States

State:

California

City:

Los Angeles

Los Angeles

Los Angeles AFB

Los Angls AFB

Street:

P.O. Box:

ZIP Code:

Address Type ?

☐ All

☒ Owner

☐ Property

Other Information

Owner Type:

☐ All

☒ Ind.

☐ Corp.

Property Type:

Agricultural

Amusement-recreation

Apartment

Commercial

Commercial Condominium

Record (1)

Back

Add to Profile

360

Export Results

Print

Help

Property Information

Property Transaction History (4)

Additional Properties (1)

Owner Names:

Allan G Mutchnik

Property Address:

1130 Schuyler RD
Beverly Hills, CA 90210-2551

Mailing Address:

300 S, Grand AVE Unit 3400
Los Angeles, CA 90071-3137

Owner Relationship:

N/A

Free and Clear: ?

No

Most Recent Purchase Price:

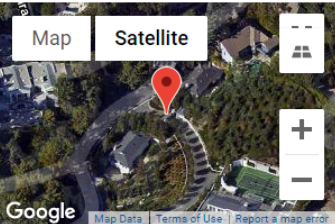
\$39,352,890

Most Recent Purchase Date:

February 14, 2005

Map

Satellite



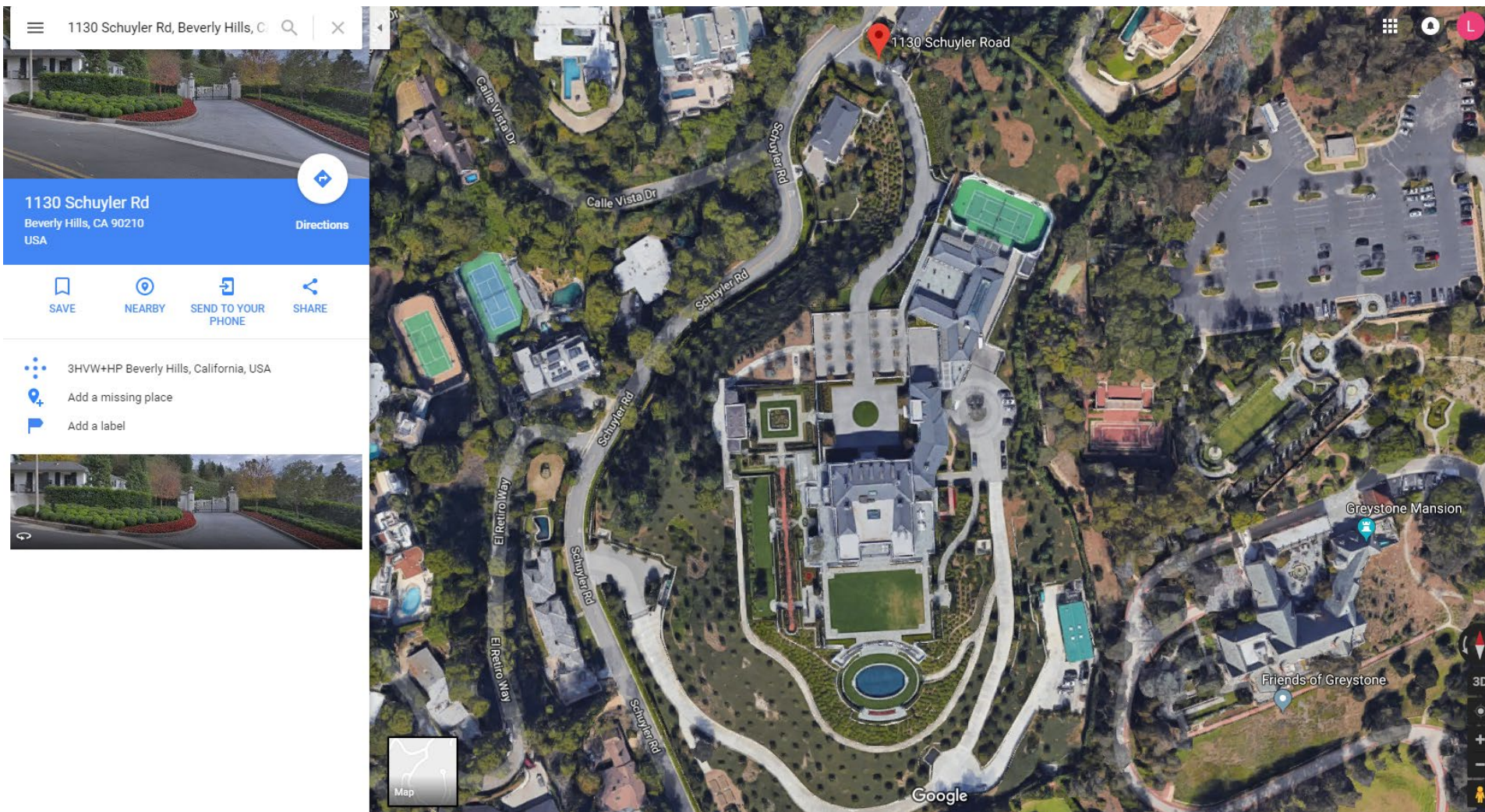
Click to view larger map

Property Assessment Details

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

Property Information

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





[PROscreen](#)
[PROfiles](#)
[Get Score NEW](#)

7,662/15,000 credits available


Search for people... 






[Home NEW](#)
[360search](#)
[ZoomInfo](#)
[RelSci](#)
[Dun and Bradstreet](#)
[DatabaseUSA BETA](#)
[Donations](#)
[Real Estate](#)
[Prospects of Wealth](#)
[Thomson Reuters](#)
[Insider Filings](#)
[Political Giving](#)
[Foundations/Charities](#)
[Matching Gifts](#)

PROscreen [New Project](#) Help



Your organization has 7,662 PROscore credits available.







 Print

Displaying 1 - 2 of 2

Page 1 of 1

Project Name	Total Capacity	Prospecting Affinity	Confidence	Submitted By	Date Submitted	Status	Credits Used	Export	Delete	Info
Sunnybrook Foundation_Analytics-Philanthropy Lense_29August2018	\$861,200,000	Philanthropy	4	lauren.fulthorpe@sunnybrook...	Aug 29, 2018	Completed	3669			
Sunnybrook Foundation_DataAnalytics_28...	\$861,400,000	Health	4	lauren.fulthorpe@sunnybrook...	Aug 28, 2018	Completed	3669			

No Researcher? No Problem!

Three quick tips to get you started:

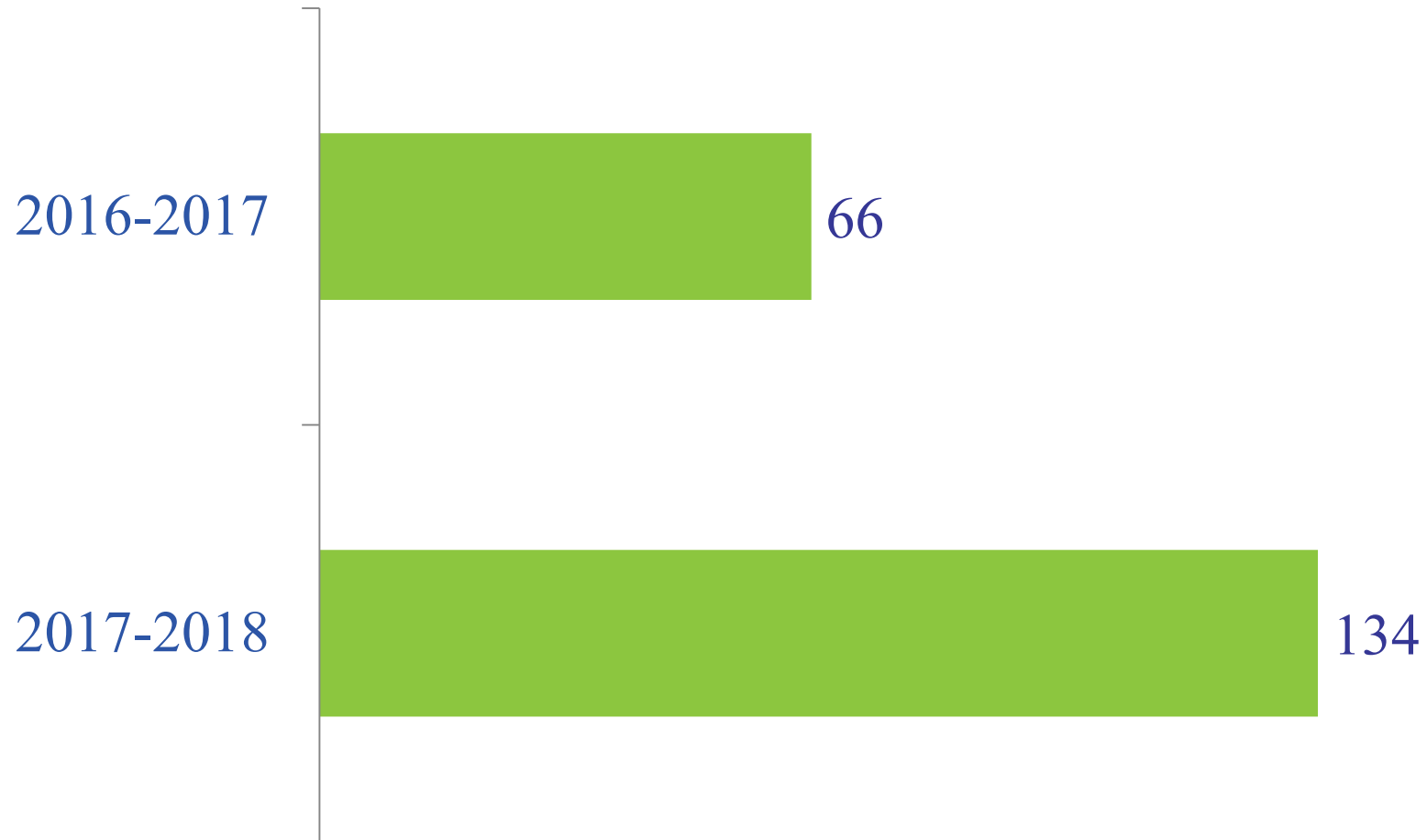
- Subscribe to a database (iWave, CharityCan)
- Embrace Research Highlights
- Wealth Ratings

The Partnership

- **Steps to success:**
 - Time
 - Flexibility
 - Finding balance
 - Communication

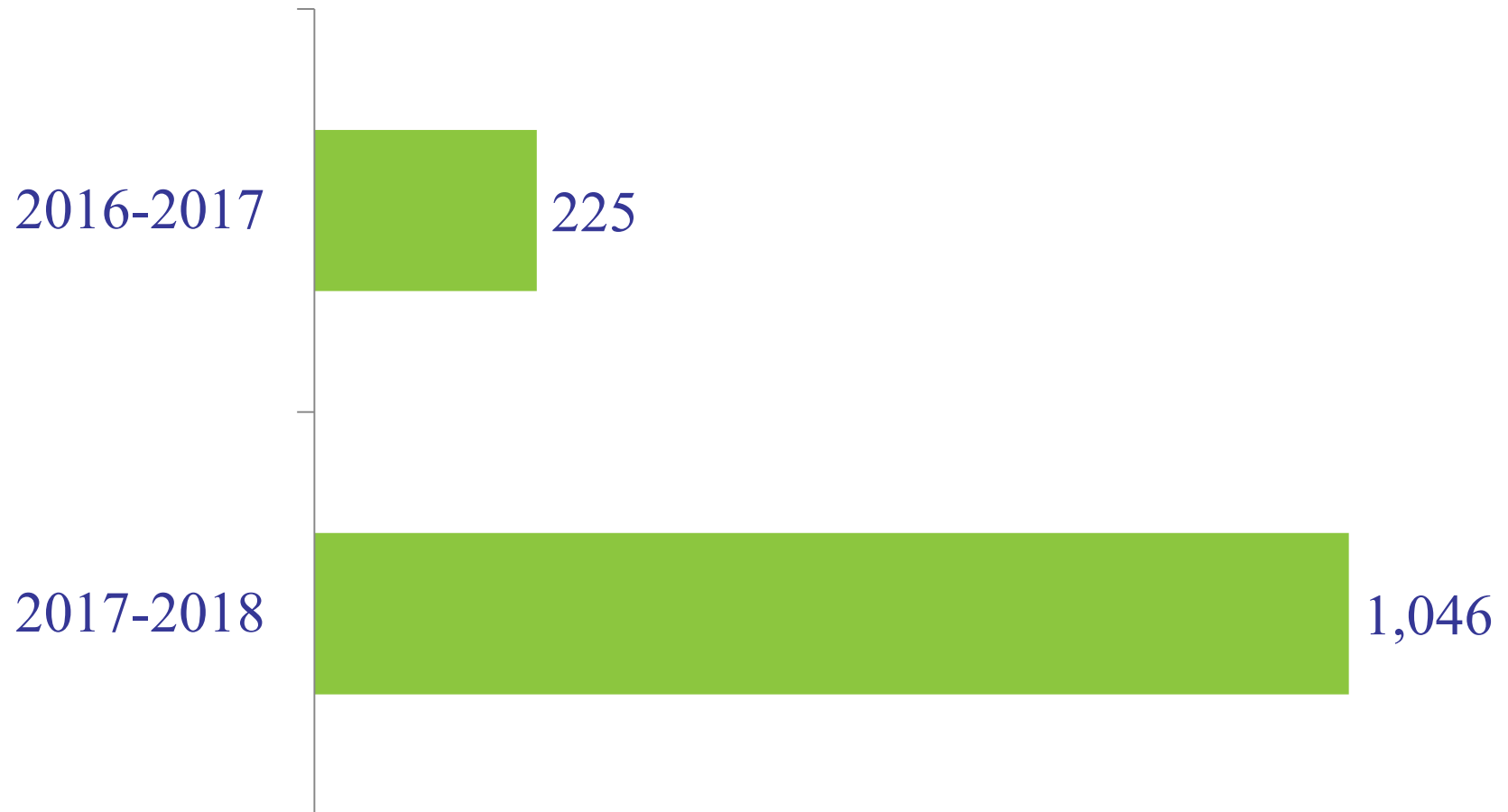
Metrics & Results

Number of Donor Meetings



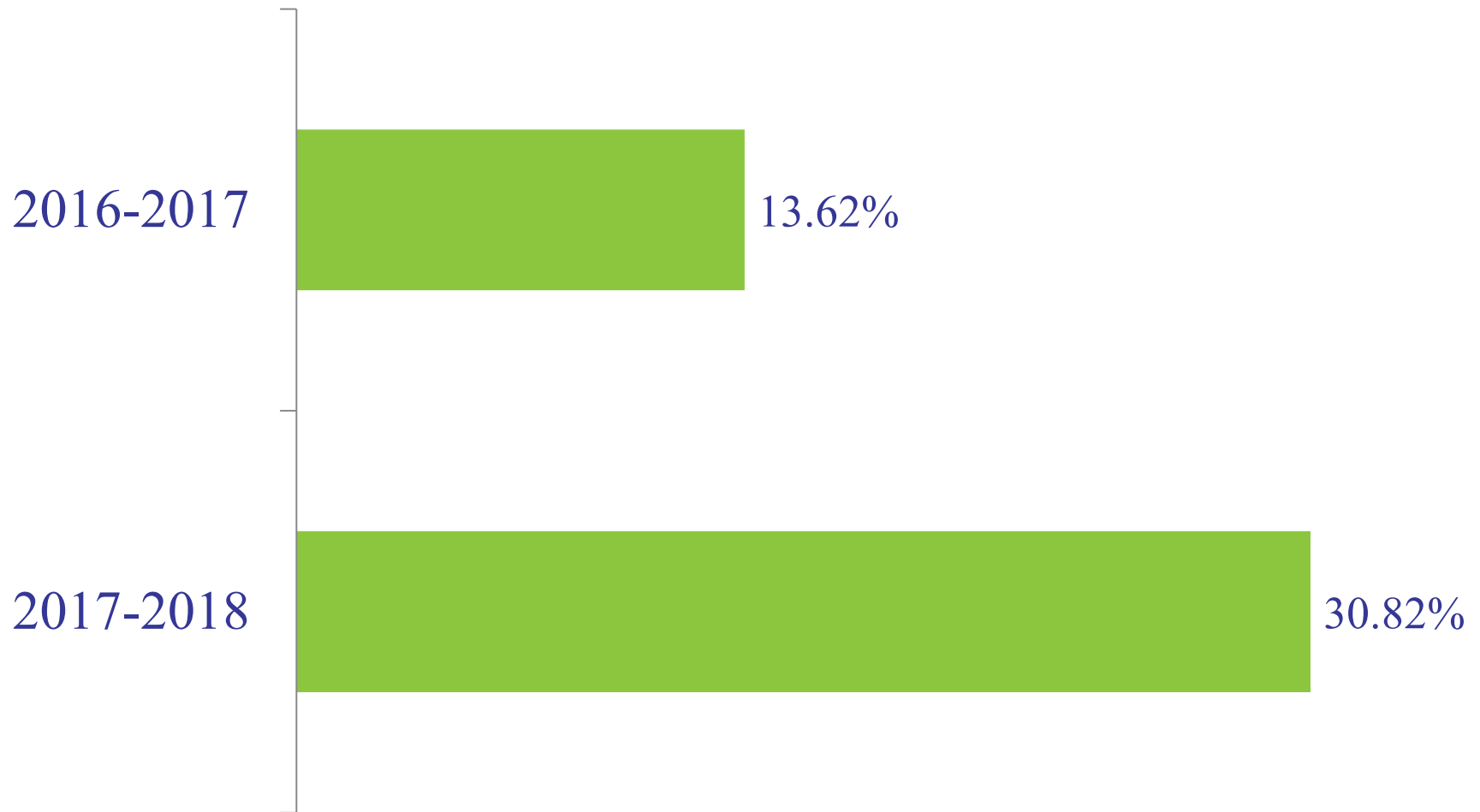
Metrics & Results

Number of Other Advancement Actions



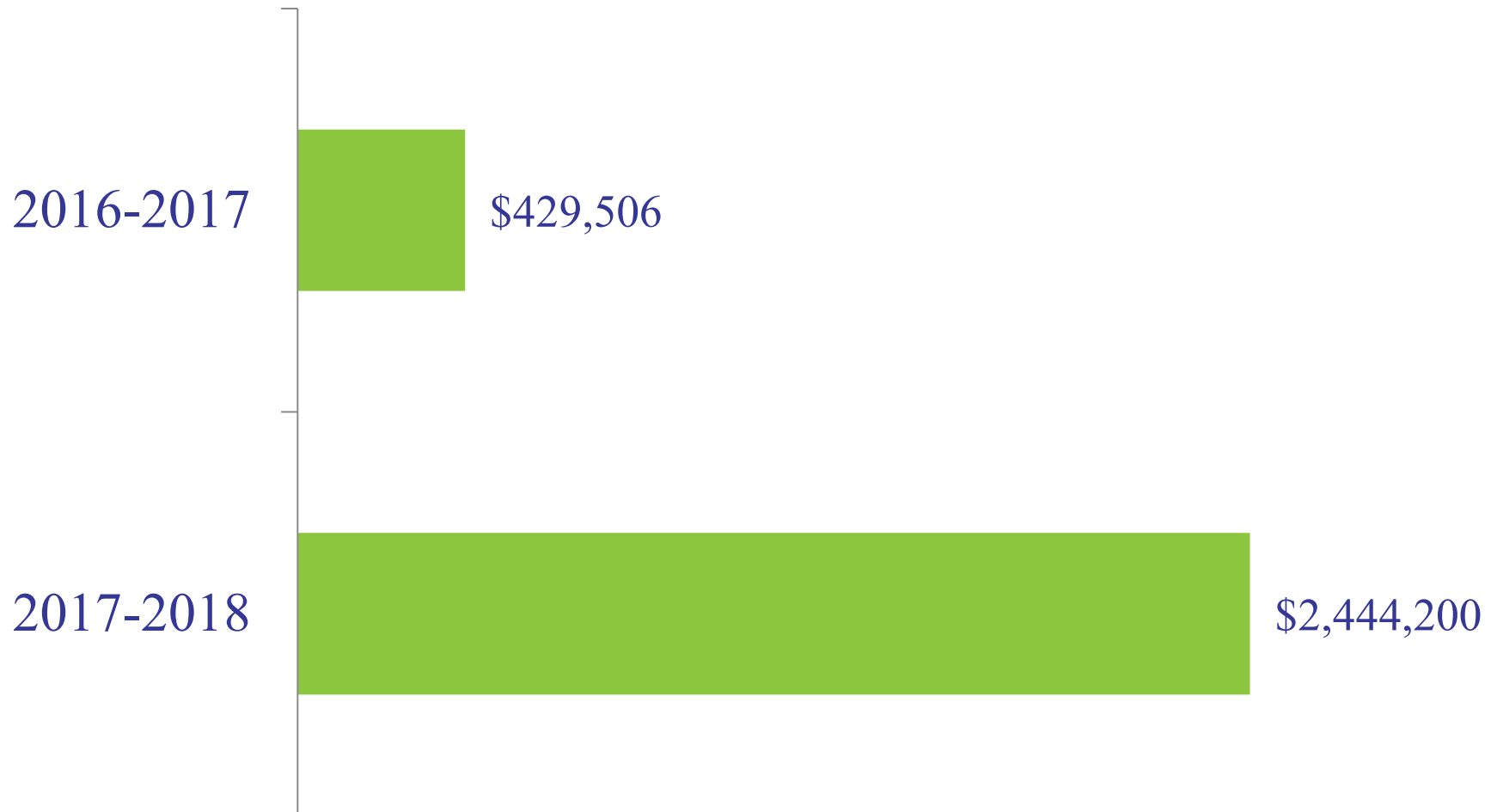
Metrics & Results

% of Portfolio Moved Forward in the Pipeline



Metrics & Results

Amount Raised (\$)



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



Oh, thank you!

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