Partners in Dime

How Advancement Professionals can benefit from Research

Thursday, May 30, 2019

Sunnybrook FOUNDATION

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Oh, hello!

Sandra Mapa

Advancement Officer

Lauren Fulthorpe

Prospect Management & Research Officer

Partners in Dime

How Advancement Professionals can benefit from Research

Thursday, May 30, 2019

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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**

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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

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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

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The Partnership

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

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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

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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

CharityCan

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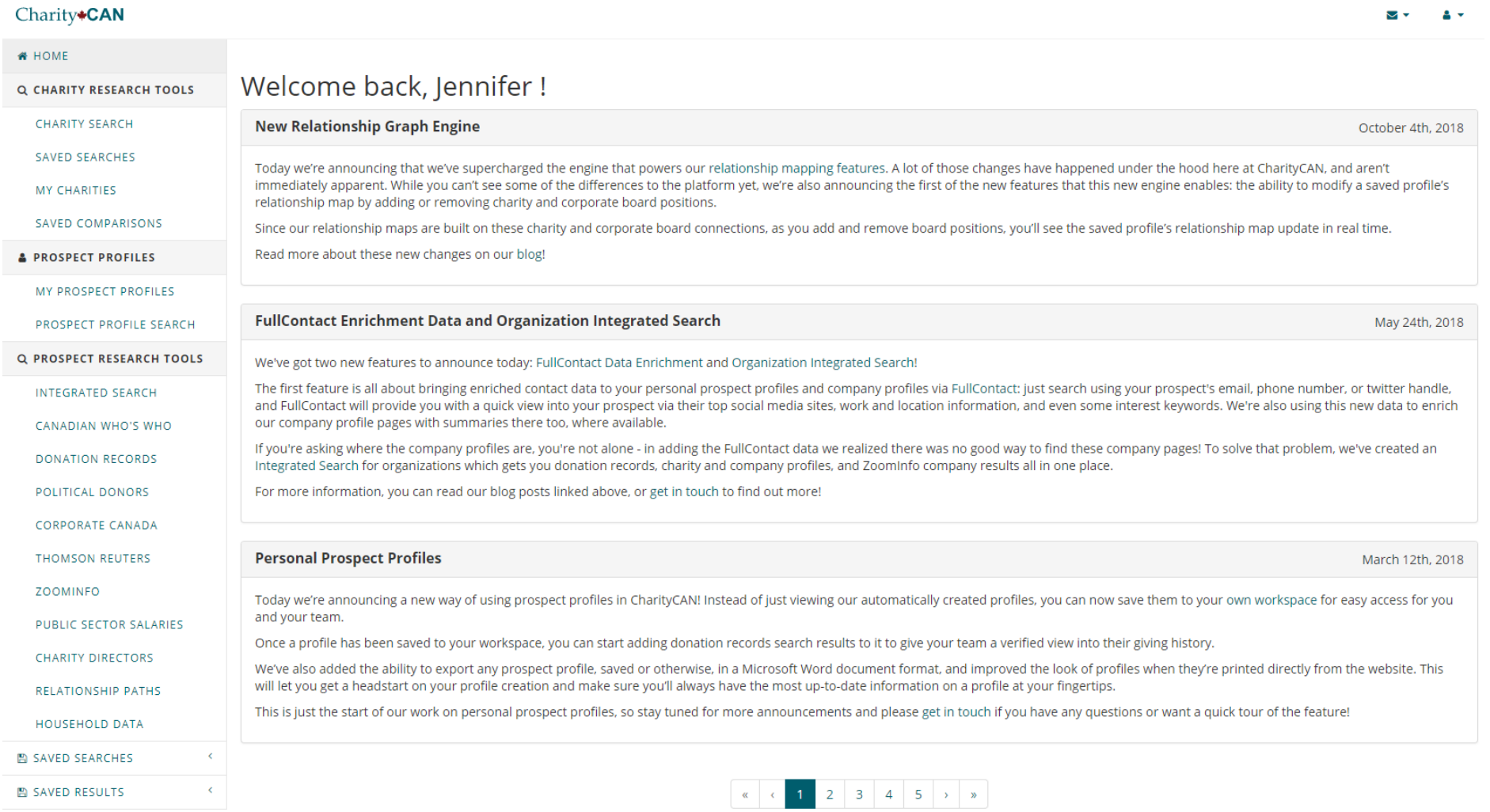

CharityCan

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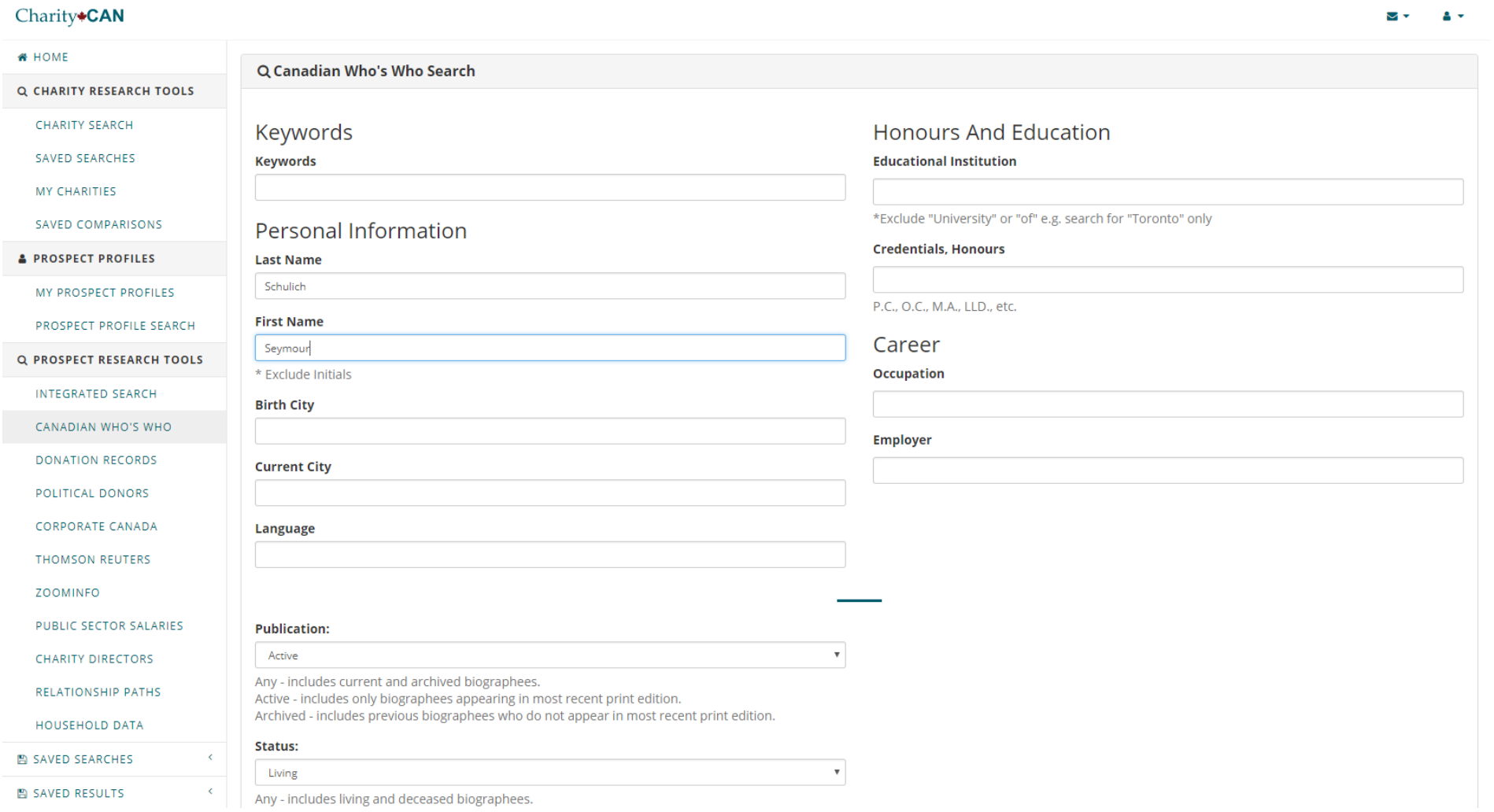

CharityCan

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CharityCAN

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., Philantropist; 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.

iWave

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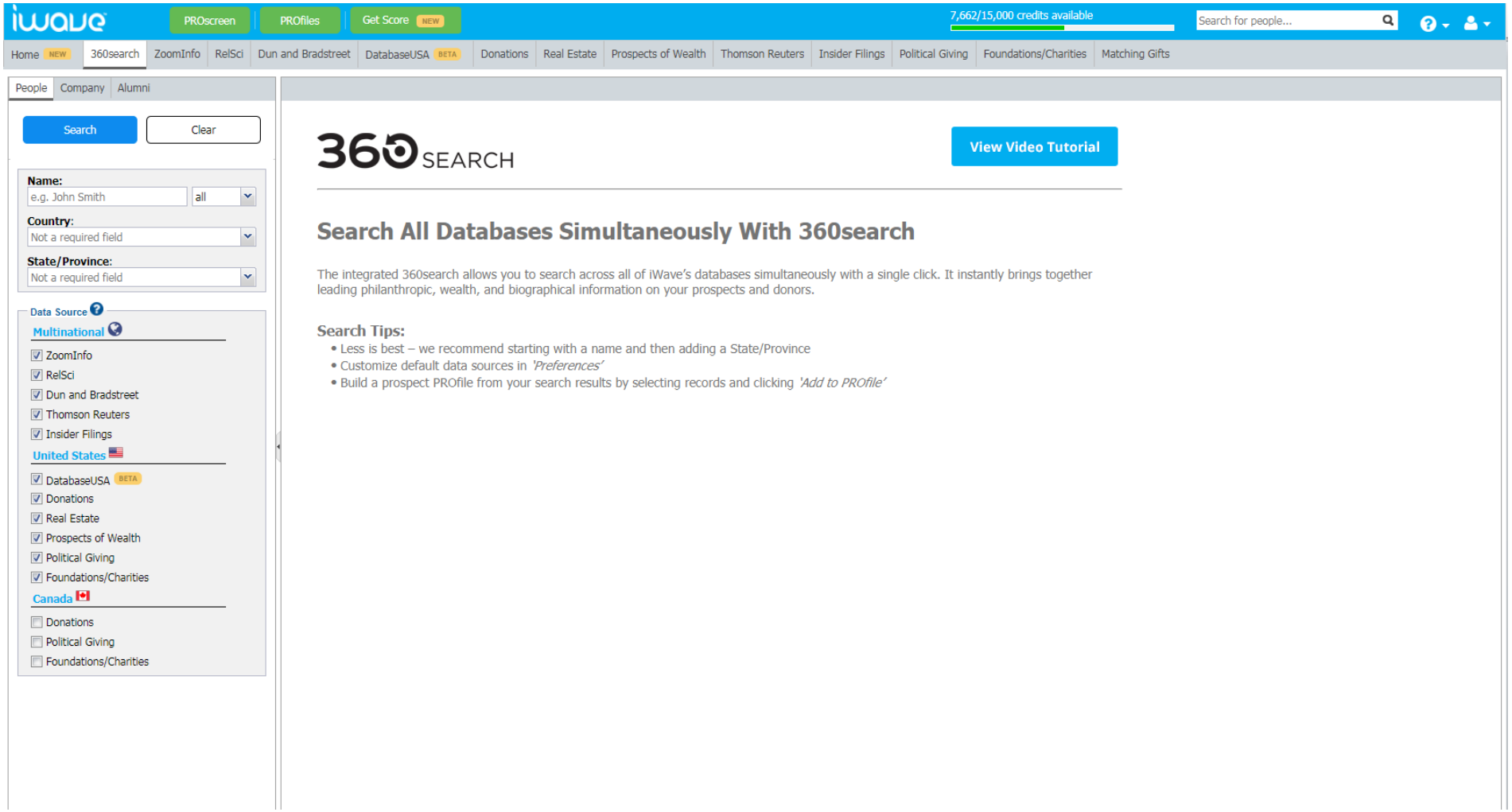

iWave

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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

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.

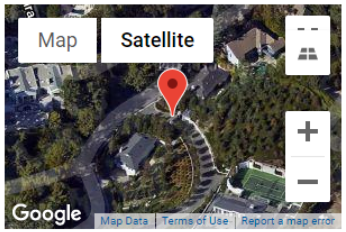
Property Type:
Agricultural
Amusement-recreation
Apartment
Commercial
Commercial Condominium

Record (1)

Back | Add to PROfile | 360 | Export Results | Print | Help | Get More:

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



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		

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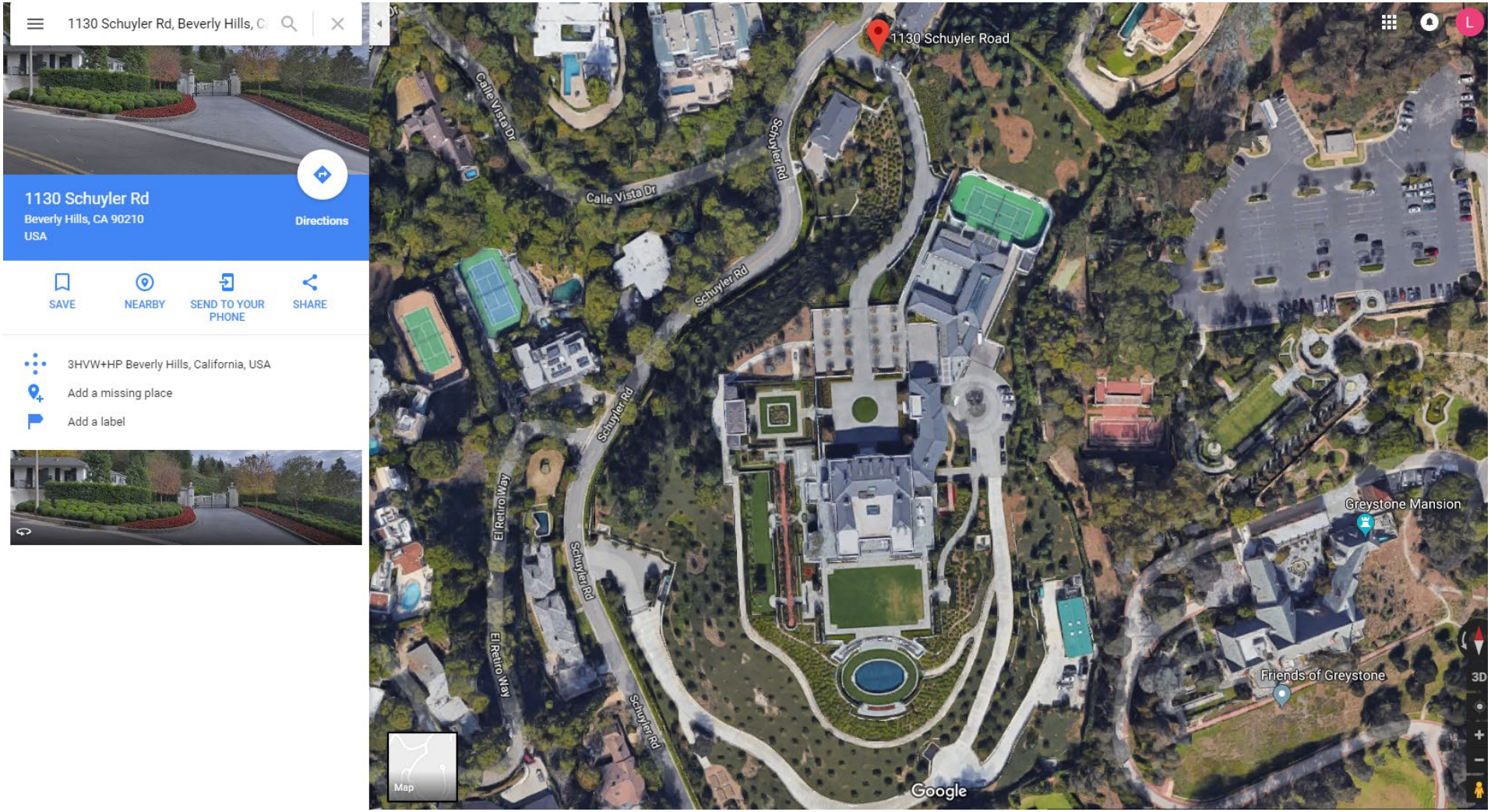

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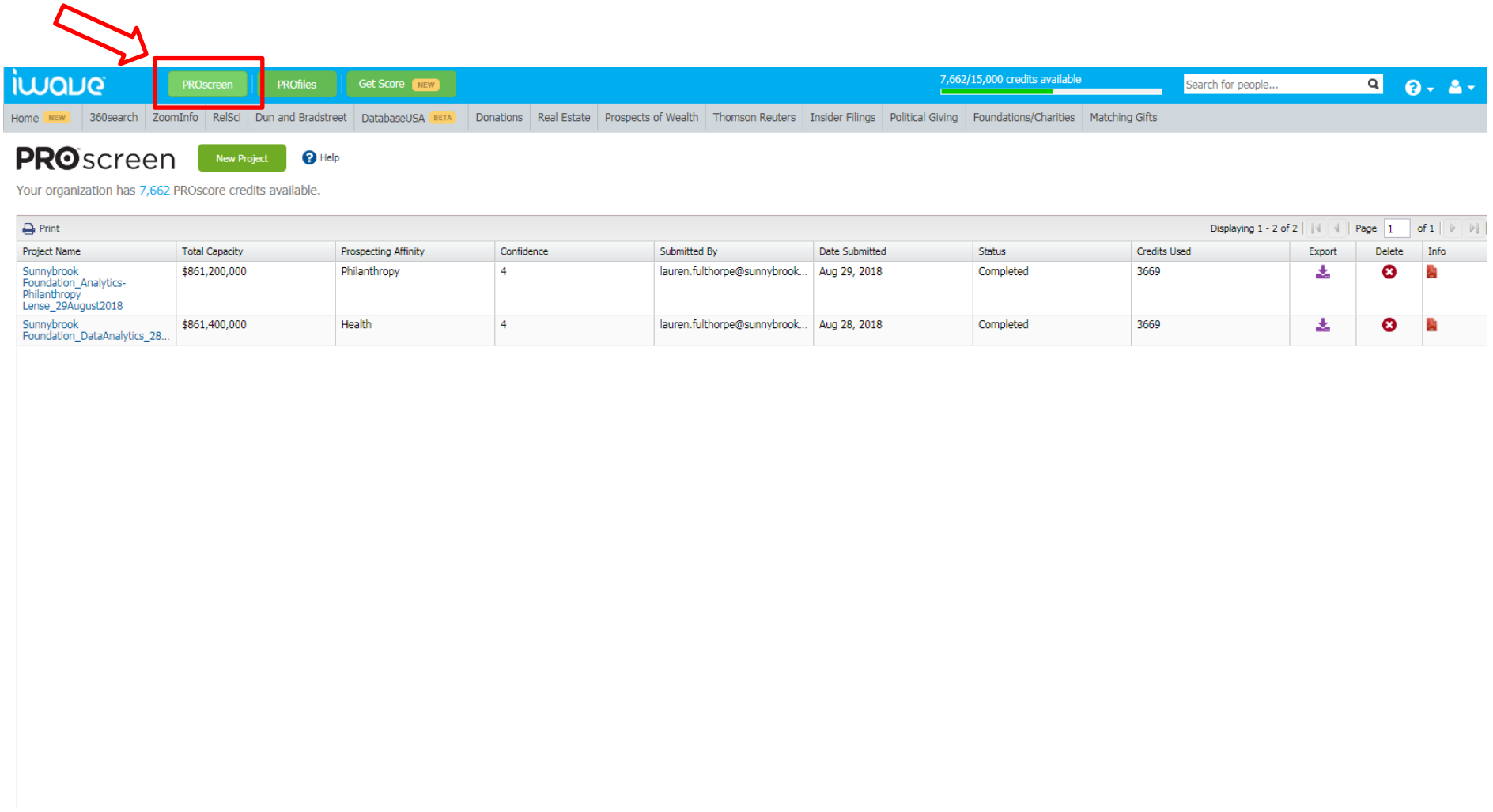

Project Name	Total Capacity	Prospecting Affinity	Confidence	Submitted By	Date Submitted	Status	Credits Used	Export	Delete	Info
Sunnybrook Foundation_Analytics-Philanthropy Lense_29August2018	$861,200,000	Philanthropy	4	lauren.fulthorpe@sunnybrook...	Aug 29, 2018	Completed	3669			
Sunnybrook Foundation_DataAnalytics_28...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

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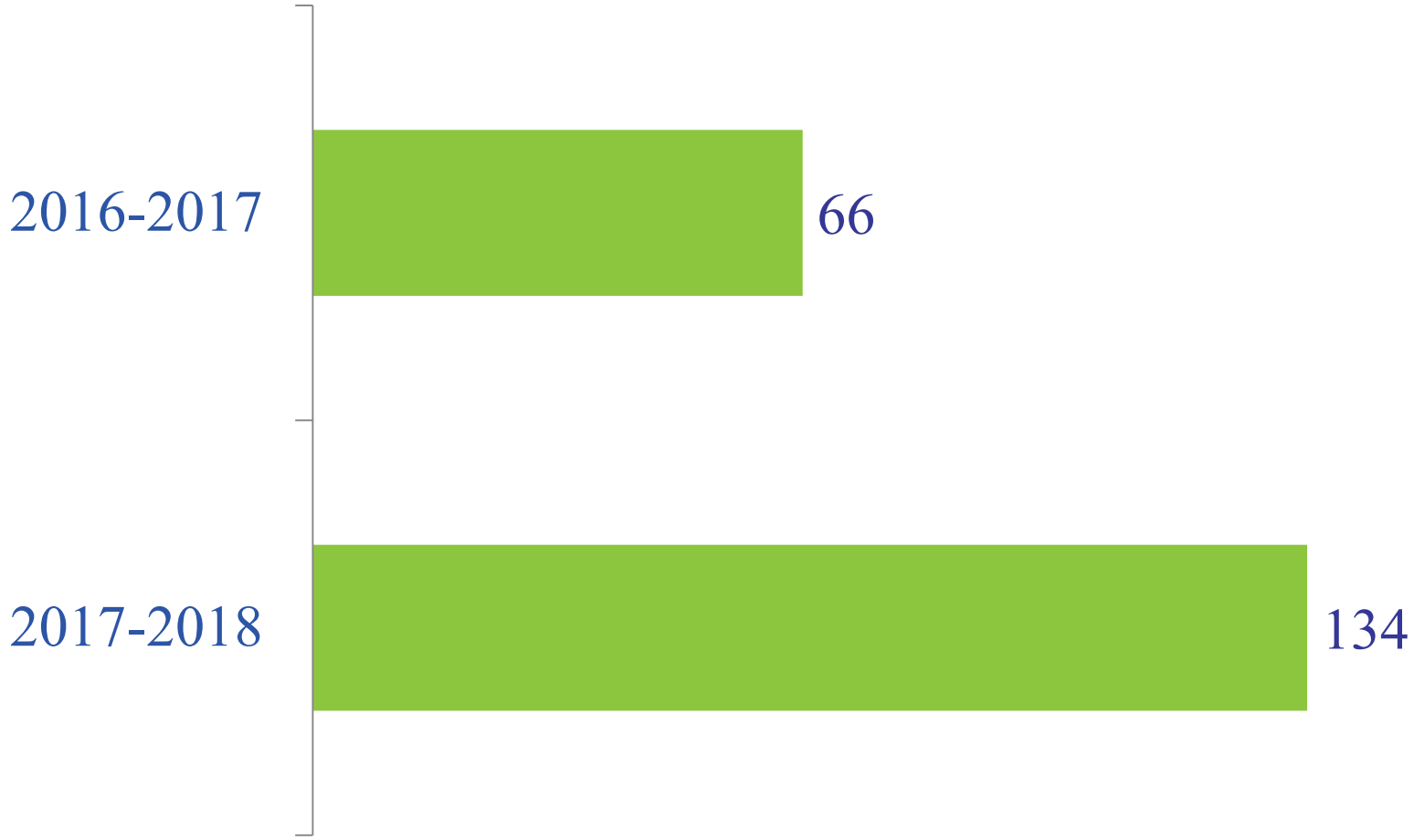
The Partnership

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

Metrics & Results

Number of Donor Meetings



Metrics & Results

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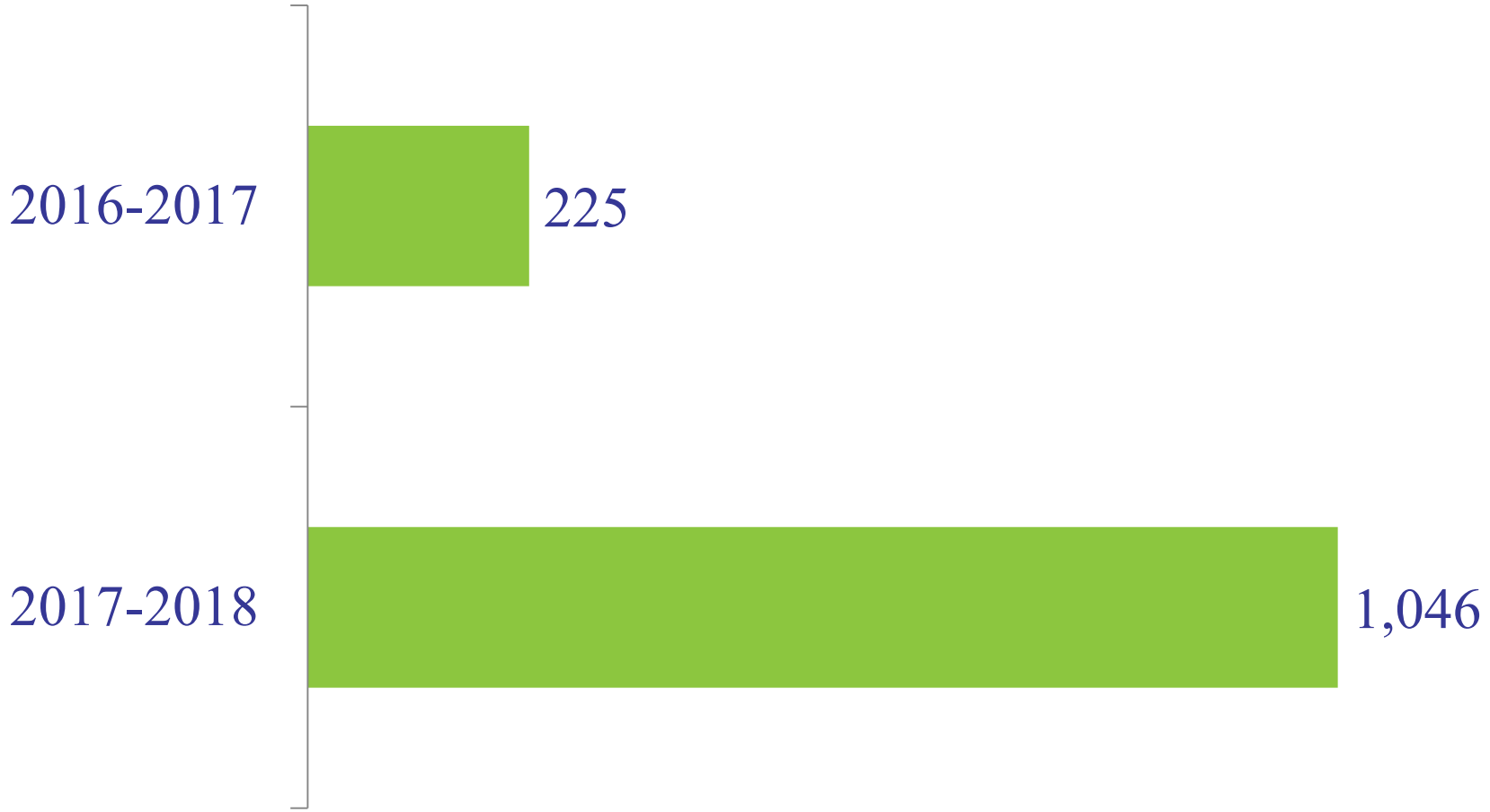
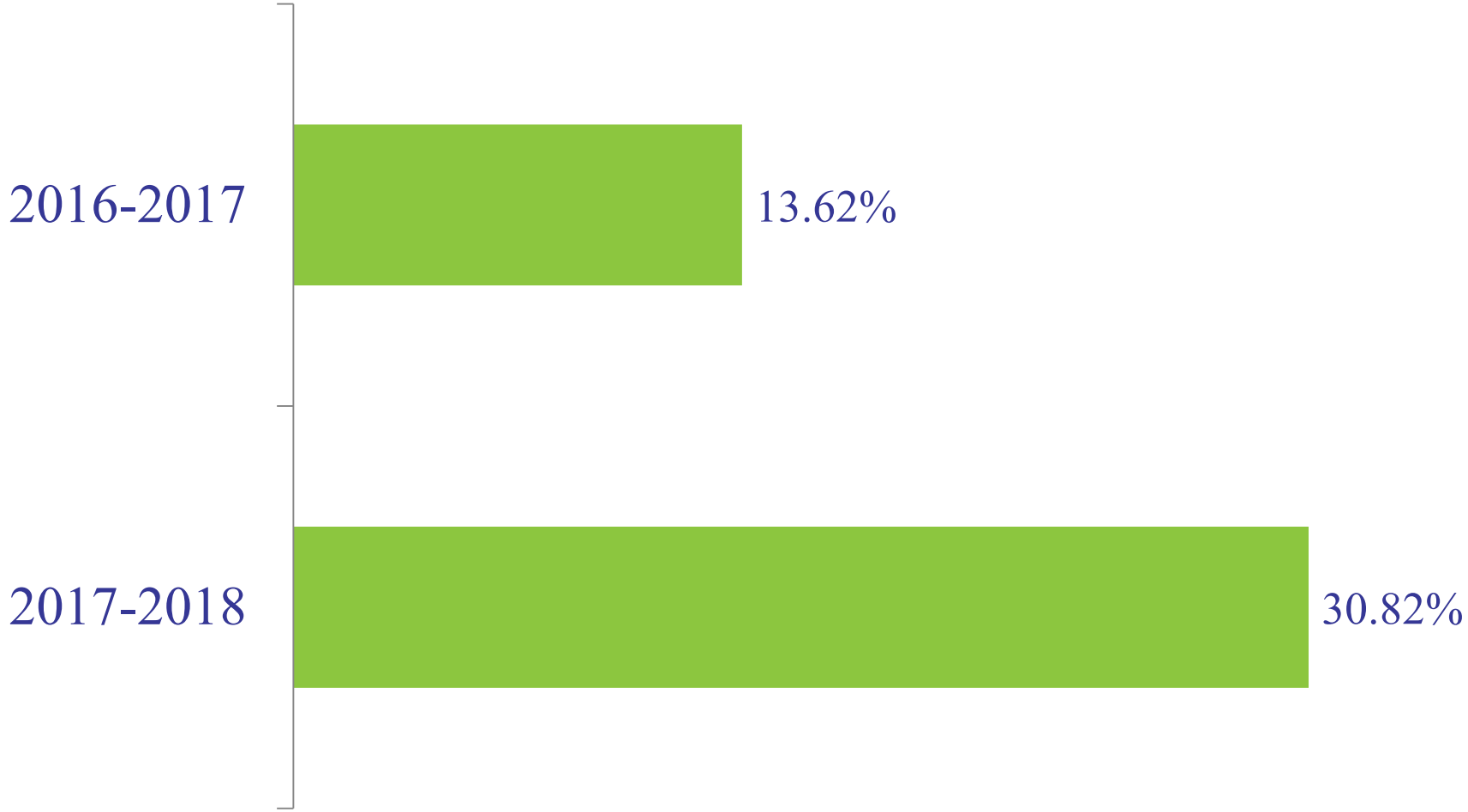
Number of Other Advancement Actions



Metrics & Results

% of Portfolio Moved Forward in the Pipeline



Metrics & Results

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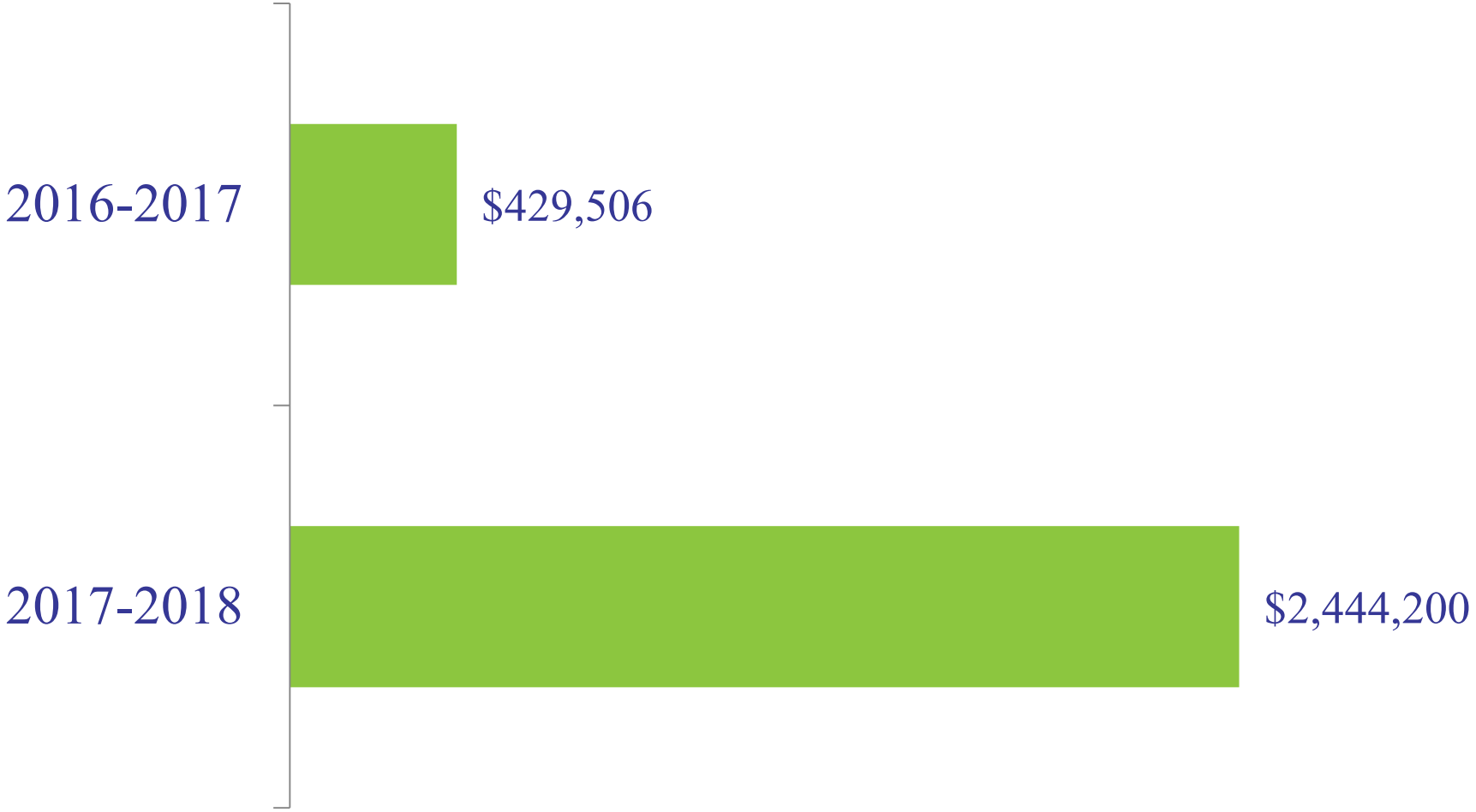
Amount Raised ($)



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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!

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Questions

Oh, thank you!

Sandra Mapa

sandra.mapa@sunnybrook.ca

Lauren Fulthorpe

lauren.fulthorpe@sunnybrook.ca