



**CASE VIII PRESENTATION**  
**Vancouver, February 24, 2011**

# **BEYOND THE PROFILE:**

## **Strategic Partnership between Prospect Research and Major Gifts**

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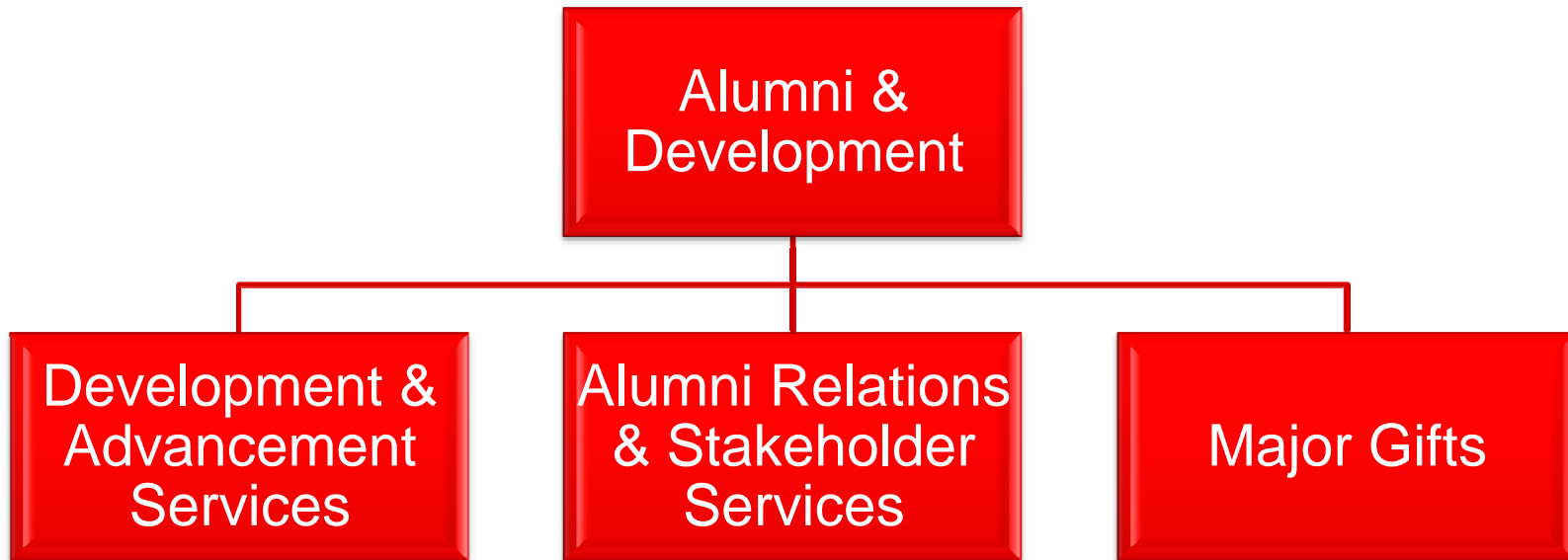
# **ALUMNI & DEVELOPMENT: OUR MISSION**

*Building relationships and investment in support of the SAIT Vision – engaging students, alumni, donors and industry.*

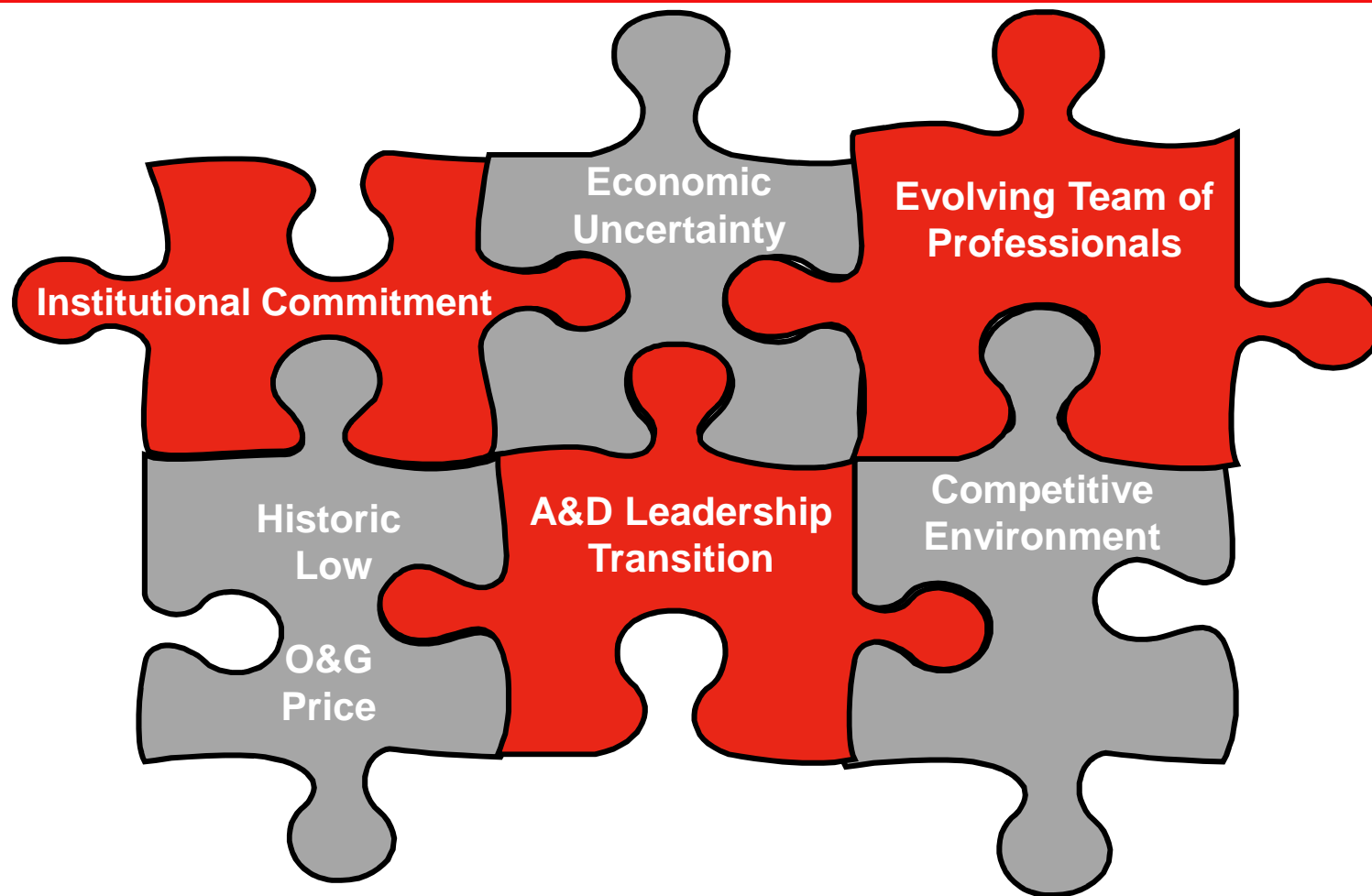


# DEPARTMENT STRUCTURE

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# 2008 ENVIRONMENT



**A lofty goal: Promising Futures™ – a \$75 million campaign to fund the new Trades and Technology Complex**

# 2008 ENVIRONMENT

Relationship with Major Gifts based on internal customer model:

-  Predominantly reactive
-  Service response
-  Volume driven
-  Traditional research products  
(Profile, LIA rating Chronologies)



# 2008 ENVIRONMENT

**2.5** Researchers   ■   **6** Major Gifts Officers   ■   **2** Annual Giving Officers

Performance Measure	Annual Target
New Profiles Created	500
Profiles Updated	250
Prospects Identified by Research	40
Chronologies prepared	No measure
90% of Asks supported by research	No measure

# THE OPPORTUNITY

Proactive involvement of research throughout donor cycle:

- ✚ Integration into the pipeline
- ✚ Strategic, ongoing Communication
- ✚ Feedback from frontline fundraisers

# DEFINING STRATEGIC PARTNERSHIP

- ✦ Cultivation plan preparation
- ✦ Enumeration of key influencers
- ✦ Ask strategy recommendations
- ✦ Objection preparation

**Collective ownership of prospect information: a shared business asset**



## TWO YEARS LATER...

- ⚙️ Number of outstanding asks increased by 148%.
- ⚙️ Number of Major Gift donors increased by 40%.
- ⚙️ Value of Major Gift pipeline increased by 47%.
- ⚙️ Prospects to be asked increased by 52%.



## TWO YEARS LATER...

- ⚙️ Dollars raised increased by 159% to \$31.2 million
- ⚙️ Verbal commitments increased by 275%.
- ⚙️ Largest gift in SAIT's 94 year history which was also the largest personal gift made to any college or polytechnic in Canada to date.

## **TWO YEARS LATER...**

- ✦ Empowered relationship with Development Officers
- ✦ Researcher is treated like a colleague...like a fundraiser

Prospect Researcher, informed by data and experience, plays a key role directing, working with and leading the field fundraiser to the right prospects, at the right time, for the right ask.

## HOW WE DID IT?



- ✦ Team leaders agreed and helped a new proactive approach
- ✦ Researchers work faster and more efficiently in partnership with the Major Gift team
- ✦ Integrated in the fundraising pipeline to ensure research is used effectively
- ✦ A shifted role to lead, as well as to respond to, activity driven by the Major Gift & Leadership Giving teams

## HOW WE DID IT?



- \* A more **comprehensive mix of deliverables** to the MG & Campaign team.
- \* Improving awareness and communication with MG team so that **information is used timely and effectively.**
- \* Bringing prospect research at SAIT to the next level towards a more **proactive and strategic approach.**

# HOW WE DID IT?



## Revised performance measures to:

- ✦ Set achievable & motivating expectations
- ✦ Reflect behavior required for the stage of the business cycle, maturity of team
- ✦ Balance various performance requirements
- ✦ Remain relevant by refreshing regularly

# THE RESPONSE

- Partnership with the Development officers to:
  - Identify needs and respond to them
  - develop a cultivation plan
  - provide final recommendations on strategy as the “ask” time approached
  - recommend ask value, suggested key influencers to be included and identify potential issues

# THE RESPONSE

- ✦ The role of researchers has changed from “information pusher” to “partner in fundraising,”
- ✦ New deliverables were created to respond to the team’s needs:
  - ✦ strategic summaries
  - ✦ research memos
  - ✦ qualification summaries
  - ✦ bi-annual portfolio assessments
  - ✦ ask matrix and closing matrix
  - ✦ interactive relationship maps



# OUR RESULTS

Product	Status	Time Range	Annual Goals /Per Full Time Researcher	
			Per Year	Per Month
LIA ( linkage, Interest, Ability) Calculator	Identification	1- 1.5 hours	242	20
Qualification Summaries	Identification	1- 2 hours		
Research Memos	Any Stage	1 – 2 hours		
Strategic Summaries	Solicitation	3-4 hours		
Full Profiles	Cultivation	4-6 hours		
Relationship Maps	Cultivation Solicitation Stewardship	6-12 hours	12	1
Prospect Lists	N/A	8- 12 hours	18	1.5
New Leads - \$25K+ capacity	N/A	Depend on the methodologies	24	2



# OUR RESULTS

- ✦ Some institutions benchmark 10 profiles (or research projects) a month per researcher. Our averages are higher as we are moving away from the full profile and working more on focused, less time and more effective research.
- ✦ Since each of our senior development officer has a full portfolio, our focus is more on providing quality leads (rather than number of leads) and helping them keep focused on the upcoming asks.
- ✦ Sometimes products fall above or below the usual time because of atypical prospects.

# OUR ROAD MAP





# INDUSTRY PRACTICE

- ✦ Researcher ratio ranges from 1:1.5 to 1:17
- ✦ Moving away from full profile due to limited resources.
  - Mini profile
  - Computer generated profile
  - Research memo
- ✦ Other deliverables
  - Identification “blurb”
  - Capacity assessment
  - Research menu
  - Sector reports and philanthropic trend
  - Database generated donor giving report
  - Event screening
  - List generation

# COMPONENTS OF STRATEGIC RESEARCH

**Role of Researcher:** Provide “just in time” research at different stages

Research is most effective when:

- ❖ Researchers are aware of the big picture
- ❖ Their info is acted upon
- ❖ They communicate regularly with fundraisers and build relationship with the team

# COMPONENTS OF STRATEGIC RESEARCH

## Communication with frontline fundraiser

- Find out what fundraisers already know before starting
- Be copied on contact reports
- Be at the table at fundraising discussions
- Obtain feedback through volunteer connectors directly or indirectly through fundraiser

# COMPONENTS OF STRATEGIC RESEARCH

## Targeted Analysis

- Most general information to an email list don't get read or used
- Provide what can be truly valuable for an organization's or campaign's overall strategy

## Examples:

- “Top List” analysis to identify “recession-proof industries”
- Changing landscape of wealth in Canada: generational transfer of wealth, emerging wealth in ethnic communities, “Say on Pay” corporate policies
- Government policies: taxation and charitable giving

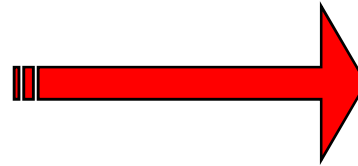
# INDUSTRY TREND

## Targeted Research

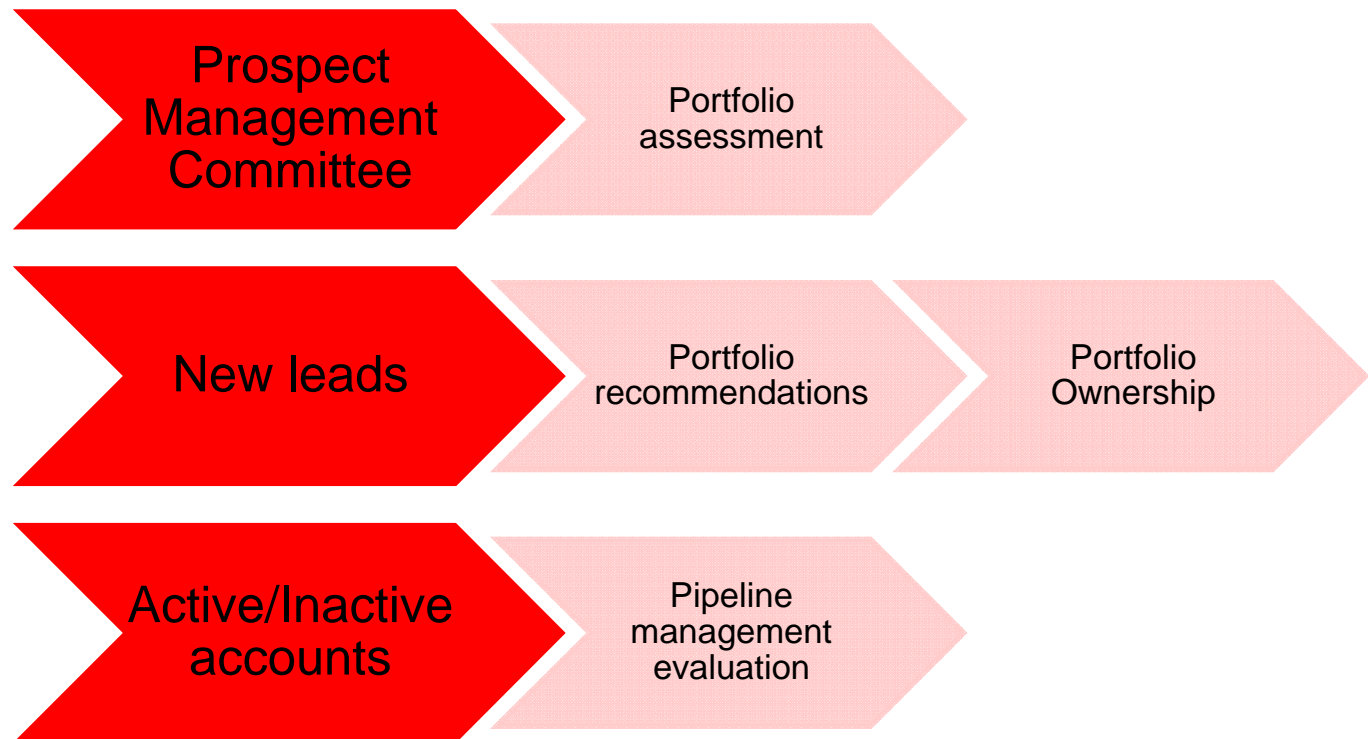
- Targeted information
- Recommendations from researcher
- Example: Qualification Summary
  - Short answer & recommendation
  - Supporting information (short bio, connectors, giving history etc.)
- Benefits:
  - Shorter turn-around time than full profile
  - Key information is highlighted according to the need
  - Researcher's input

# PROSPECT MANAGEMENT

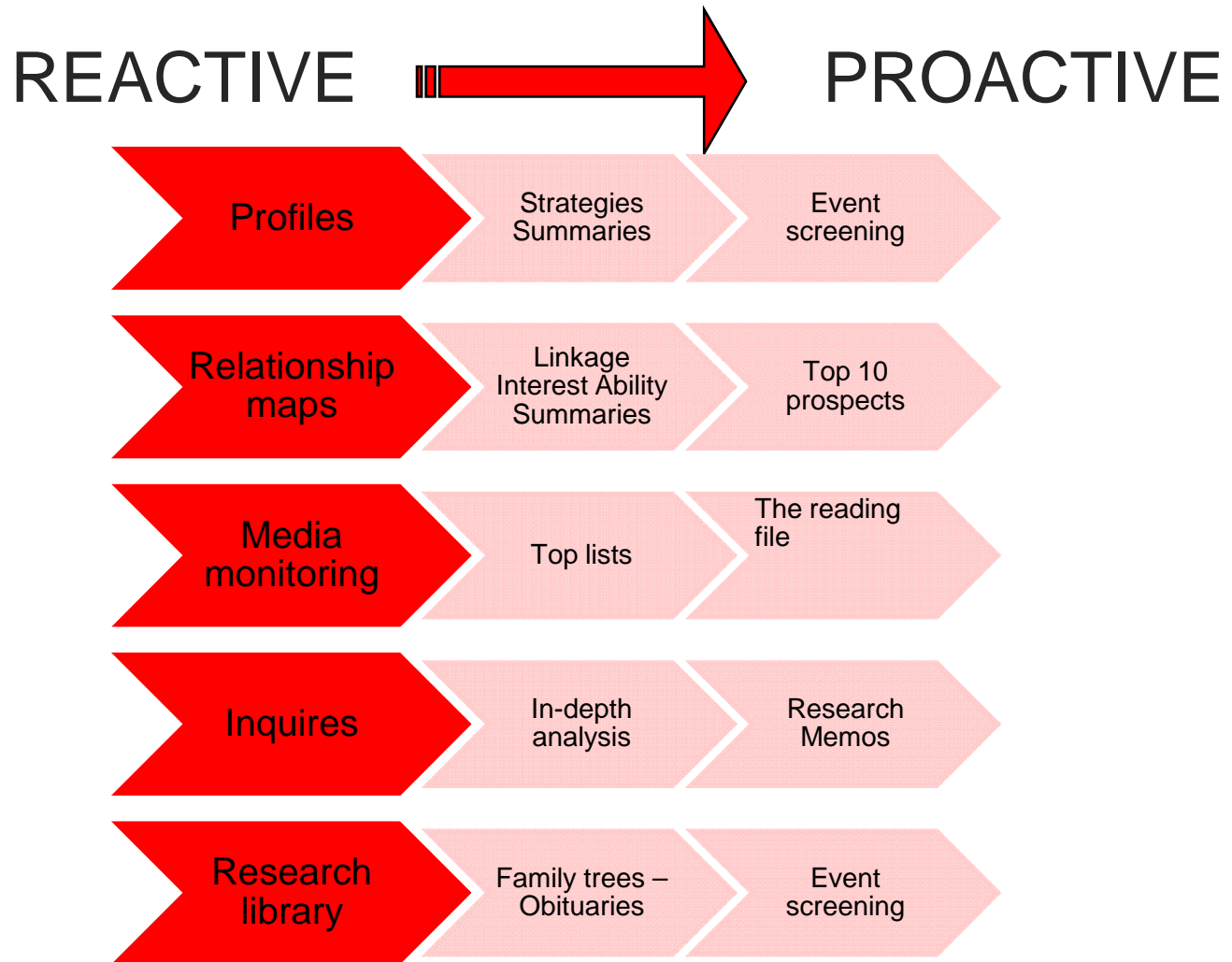
REACTIVE



PROACTIVE

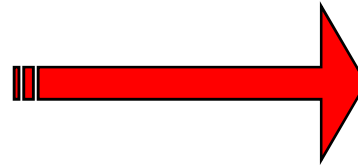


# INFORMATION MANAGEMENT

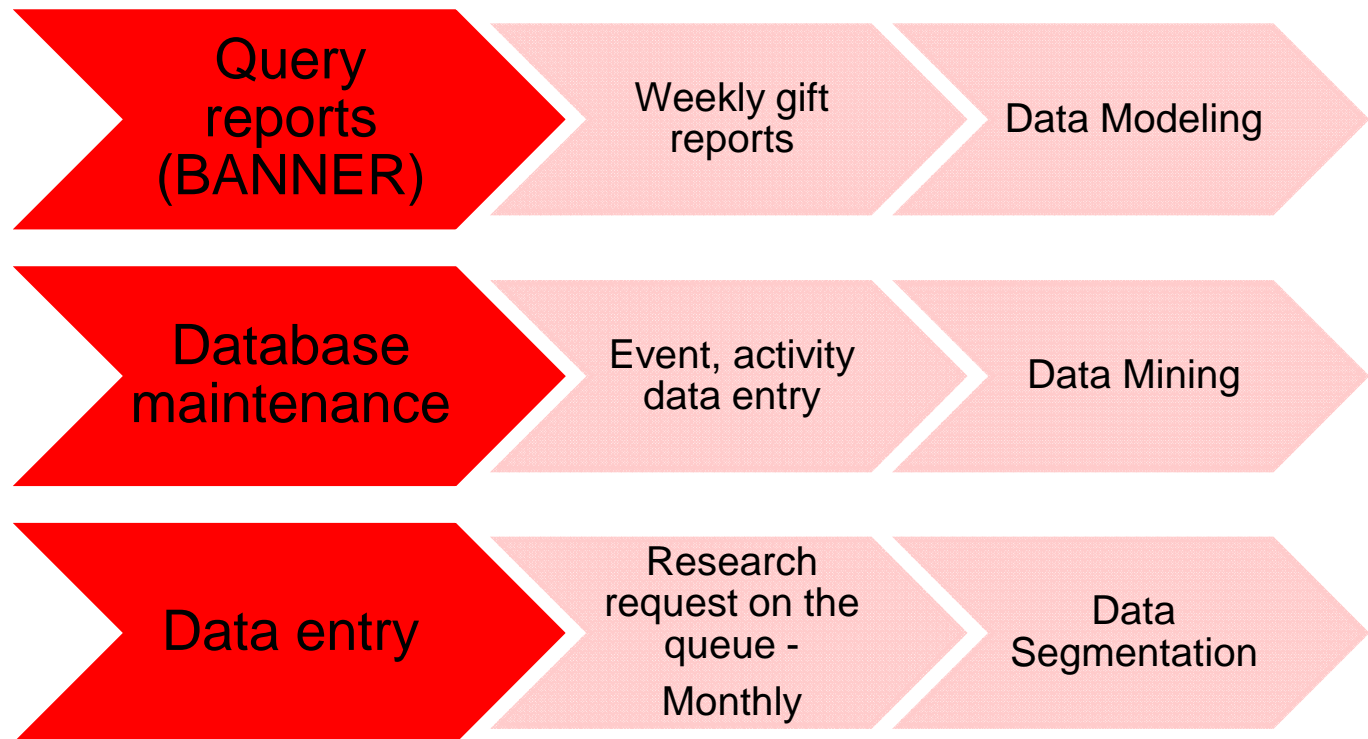


# DATA MANAGEMENT

REACTIVE



PROACTIVE





# RESEARCH IN DIFFERENT STAGES

STAGES	TARGETED RESEARCH
IDENTIFICATION & QUALIFICATION (Status: Lead, Assign for Action, Discovery)	<ul style="list-style-type: none"> <li>-Prospecting tools (media scan, data mining, etc.)</li> <li>-Qualification tools (Linkage, Interest and Ability &amp; Planned Giving Rating and Prospect Management Committee recommendations)</li> </ul>
CULTIVATION	<ul style="list-style-type: none"> <li>-Full profile</li> <li>-Relationship map</li> </ul>
SOLICITATION (Status: To-Be-Asked, Ask Pending, Verbal Commitment, Written Commitment )	<ul style="list-style-type: none"> <li>-Strategic Summary</li> <li>-Media updates</li> <li>-Relationship Map</li> </ul>
ASKED DECLINED	-Prospect Management Committee
STEWARDSHIP	-Follow life events and flag acknowledgement where appropriate; suggest re-engagement where appropriate

# MAKING IT WORK





# QUESTIONS ?

