An Introduction to Prospect Research in the Charitable Sector

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Senior Manager, Prospect Research, Canadian Red Cross

www.traceychurchresearch.com
Agenda

• What is Prospect Research?
• Why the library programs?
• How do we work in the “cultivation cycle”??
• What resources are used to research:
  – Foundations
  – Corporations
  – Individuals
• Data management example: Ratings
• Next Steps: Education, Professional Associations & Job Opportunities
• Summary
• Questions
What is prospect research?

• Prospect researchers are hired by their organizations to find *major giving* donors for their organization through background research on individuals, corporations and foundations to find which will be the *most likely* to give to your organization

• APRA: Association of Professional Researchers for Advancement
  – Ongoing education: conferences, webinars, regional meetings
  – Mentor program, publications, websites, networking

• APRA  [www.aprahome.org](http://www.aprahome.org)  (US $225/year)

• APRA-Canada [www.apracanada.ca](http://www.apracanada.ca)  ($45/year)

APRA-Canada members’ discount price: $65
Non APRA-Canada price: $85

*Business card draw today!!!*
Prospect Research Focus

Types of Giving

- Estate or Planned
- Major
- Annual

Prospect Research
Targeted at Major Gifts
Some Emphasis on Planned Giving
Why do we recruit from the library programs?

Librarians are taught many techniques which are also used by prospect researchers, such as:

- **Reference resources**: used to look up information on individuals & companies
- **Reference “interview”**: used to target appropriate research and reports
- **Database management**: Management of donor databases, online resources, and data mining
- **Natural curiosity and tenacity!**
How a Prospect Researcher “Sees” it:

The Cultivation Cycle

- Identification
- Research
- Qualification
- Solicitation
- Cultivation
- Stewardship
- Research
## The Cultivation Cycle

<table>
<thead>
<tr>
<th>Cultivation Stage</th>
<th>Prospect Research</th>
<th>Prospect Management</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Identification</strong></td>
<td>Identify prospects through various sources</td>
<td>Add/update prospects in database</td>
</tr>
<tr>
<td><strong>Qualification</strong></td>
<td>Collect information regarding new prospect</td>
<td>Rate prospects (internal and/or external tool) for capacity &amp; affinity</td>
</tr>
<tr>
<td><strong>Cultivation</strong></td>
<td>Collect news alerts, update development officers on any new activity. Which cultivation activities might interest the prospect?</td>
<td>Prospects are assigned to development officers for cultivation. Make sure &quot;right&quot; prospects are invited to the &quot;right&quot; cultivation &amp; stewardship events (at the &quot;right&quot; time)</td>
</tr>
<tr>
<td><strong>Solicitation</strong></td>
<td>Compile profile information for development officer's (&amp; volunteer’s) first meeting with prospect</td>
<td>Track prospects along cultivation cycle (moves management with team)</td>
</tr>
<tr>
<td><strong>Ask &amp; Stewardship</strong></td>
<td>Identify probable ask amount based on past giving, capacity, and development officer's added knowledge through cultivation regarding affinity</td>
<td>Team: Update database after gift, new rating, stewardship activity, and beginning date for next cycle of cultivation</td>
</tr>
</tbody>
</table>
Ideally:

• 50% **Reactive** Research
  – Research requests
  – List generation & review
  – Relationship mapping
  – Prospect follow-up
  – Media monitoring

• 50% **Proactive** Research
  – Find *NEW* prospects for pipeline
  – *PUSH* out generated leads to solicitors
  – Moves management of prospects through cultivation cycle
    → tracking & future solicitation strategies
  – Analytics
  – Media monitoring
People, people, people!

- First and foremost! – Do research which looks within at LINKAGES to:
  - Staff Members
  - Board Members (key volunteers)
  - e.g.) Peer Screening
  - Committee Members
  - Event Volunteers
  - Event Attendees
  - Sponsors
  - Vendors
  - Current Major Donors
  - Advisory Groups
  - Professional Groups
  - And your database: RFM*
    - *recency, frequency, monetary

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5 Minute Linkage Break-Out

• Pick someone around you who you don’t know well
• Find at least one linkage or commonality
  – that doesn’t include being a librarian or attending this conference!
• Examples could be:
  – What schools did you attend?
  – Where did you grow up?
  – Who are your family members?
  – What are your other interests and activities?

This is relationship building that:
  a) Is necessary in fundraising
  b) Is research
  c) Needs to be recorded

We will do a one minute “share” after 😊
An example of Sources for Foundations

- Your own database: RFM – recency, frequency, monetary
- **Imagine Canada**
  - Grant Connect (fee – formerly Canadian Directory of Foundations & Corporations)
- **Charity Village**
- **Canadian Charities Listings** (CRA) – T3010s
- **BIG Online** (Foundation Search)
- **iWave PRO** – Prospect Research Online
- **CharityCan**
- **NOZA** (also available through **CharityCAN**)
- US foundations: [www.foundationcenter.org](http://www.foundationcenter.org)
- Public or university libraries
T3010s

• All registered non-profit organizations in Canada must file a tax return with Canada Revenue Agency (CRA) that is called a T3010. The information from this form is available to the general public. The information contained in this document includes:
  • Contact information
  • Directors and officers
  • Funding interests
  • Financials
  • Grants
The Detail Page provides you with the foundation’s mailing address:

<table>
<thead>
<tr>
<th>BN/Registration Number:</th>
<th>119240091RR0001</th>
</tr>
</thead>
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<tr>
<td>Charity Status:</td>
<td>Registered</td>
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<tr>
<td>Effective Date of Status:</td>
<td>1967-01-01</td>
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<tr>
<td>Sanction:</td>
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<tr>
<td>Language of Correspondence:</td>
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<td>Designation Description:</td>
<td>Private Foundation</td>
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<td>Charity Type:</td>
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</tr>
<tr>
<td>Category:</td>
<td>(Welfare) Charitable Corporations</td>
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<tr>
<td>Address:</td>
<td>1002, RUE SHERBROOKE OUEST BUREAU 1800</td>
</tr>
<tr>
<td>City:</td>
<td>MONTREAL</td>
</tr>
<tr>
<td>Province/Territory/Other:</td>
<td>QUEBEC</td>
</tr>
<tr>
<td>Country:</td>
<td>CA</td>
</tr>
<tr>
<td>Postal Code/Zip Code:</td>
<td>H3A3L6</td>
</tr>
<tr>
<td>Charity Email Address:</td>
<td><a href="mailto:INFORMATION@MCCONNELLFOUNDATION.CA">INFORMATION@MCCONNELLFOUNDATION.CA</a></td>
</tr>
<tr>
<td>Charity Web site Address:</td>
<td><a href="http://WWW.MCCONNELLFOUNDATION.CA">WWW.MCCONNELLFOUNDATION.CA</a></td>
</tr>
</tbody>
</table>

Registered Charity Information Return: **T3010 Return**

Once you click on “Registered Charity Information Return” you will see the foundation’s T3010 for several years. **Clicking on the year brings you to the T3010.**
Imagine Canada

Grant Connect (fee – formerly Canadian Directory of Foundations & Corporations).

– Grant Connect is a fee-based service from Imagine Canada and uses not only the CRA information each year but also collects profile information from the Foundations directly providing a more robust search tool.
Grant Connect: Example of Funding Interests Search

Funder Search

Quick Lookup

Filter by Funding Interest
- Social Services
- Health
- International
- Religion
- Environment
- Sciences / Social Sciences
- Arts and Culture
- Education
- Sports and Recreation
- Charitable and Voluntary-Sector Development

Filter by Granting Region

- Community / Family Services
- Crime / Violence / Abuse
- Social / Economic Justice
- Aboriginal Peoples
- Gender Issues
- Poverty
- Housing / Shelter
- Community Development
- Children / Youth
- People with Disabilities
- Seniors
- Newcomers to Canada
- Veterans / Military Organizations
- LGBTQ Community
- Crisis Services
- Emergency / Rescue Services
- Safety Awareness
- Cemeteries
- Family Planning
- Adoption / Foster Parenting
- Food Banks
- Conflict Resolution
- Employment Services
- Family Counselling
- Parenting

SHOW RESULTS (1797)  Clear Selected Filters
Foundation Websites

Foundation Annual Reports

• Some foundations publish annual reports, which provide insight on their mission and philosophy, detailed information on gifts, application guidelines, etc. These can be obtained either from the foundation’s website or by contacting the foundation directly.

• Visit the J.W. McConnell Family Foundation website at: http://www.mcconnellfoundation.ca/

• To see the information available through a foundation website.
Example of Sources for Corporations

- Your own database: RFM – recency, frequency, monetary
- Google Finance or Globe Investor
- Canadian Newswire www.newswire.ca/en/
- CharityCAN
- Charity Village
- *D&B Canadian Key Business Directory Online (bought by Mergent) - private companies!
- *Scott’s Ontario Manufacturers (Print) – smaller businesses!
- SEDAR
- SEDI
- EDGAR
- *FP Directory of Directors (& Corporate listings) Print, CD, online
- Hoovers (online) www.hoovers.com
- Innovation, Science and Economic Development Canada (fmr. Industry Canada)
- LEDC (& other Economic Development Corp. business directories)
- *BIG (online) www.bigdatabase.ca
- *PRO – Prospect Research Online
- ZOOM
- PUBLIC or university libraries
Types of Companies in Canada

A corporate prospect may be:

- A publicly-traded Canadian company
- A private Canadian company
- A subsidiary of another company
# Types of Information

<table>
<thead>
<tr>
<th></th>
<th>Public</th>
<th>Private</th>
<th>Subsidiary</th>
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</thead>
<tbody>
<tr>
<td>Corporate Website</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Annual Information Form</td>
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<tr>
<td>Annual Report</td>
<td>✔️</td>
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<td>Financial Statements</td>
<td>✔️</td>
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<td>Imagine</td>
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<tr>
<td>Internet Search</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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</tbody>
</table>
Corporate Ways of Giving

Companies financially support their communities in various ways, including:

- Donations
- Sponsorships
- Deep discounts
- Collection from the public (scan when buy)
- Strategic partnerships (CRM – cause-related marketing e.g.)
Types of Giving

- Direct donations = 81%
- Sponsorship & Cause-Related Marketing = 19%
- Overall contributions averaged $340,000

Cause-related marketing (CRM) is “a partnership between a for-profit company and a non-profit organization that increases the company’s sales by aligning with a charitable cause to influence buying decisions. CRM bolsters sales as it enhances corporate image, targets key markets, differentiates a company from its competition and fosters customer loyalty” (Canadian Cancer Society, 2009).

e.g. Pink Ribbons on products

* Chooka Boots - 10% of proceeds go to Breast Cancer Research
## Example Info from a SEDAR Report (ONEX Corp.)

### Summary Compensation Table

<table>
<thead>
<tr>
<th>Name and principal Position</th>
<th>Year</th>
<th>Salary</th>
<th>Share-based awards</th>
<th>Option-based awards (1)</th>
<th>Annual incentive plans</th>
<th>Long-term incentive plans</th>
<th>Pension value</th>
<th>All other compensation</th>
<th>Total compensation</th>
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<tbody>
<tr>
<td>Chief Executive Officer</td>
<td>2013</td>
<td>US$1,300,000</td>
<td>—</td>
<td>US$59,583,828</td>
<td>US$24,433,577</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>US$85,317,405</td>
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<tr>
<td></td>
<td>2012</td>
<td>US$1,300,000</td>
<td>—</td>
<td>—</td>
<td>US$12,000,000</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>US$13,300,000</td>
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<td>Mr. Donald W. Lewtas</td>
<td>2014</td>
<td>US$ 376,081</td>
<td>—</td>
<td>US$ 142,575</td>
<td>US$ 1,007,429</td>
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<td>—</td>
<td>—</td>
<td>US$ 1,526,085</td>
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<tr>
<td>Chief Financial Officer</td>
<td>2013</td>
<td>US$ 402,050</td>
<td>—</td>
<td>US$ 308,575</td>
<td>US$ 1,244,029</td>
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<td>US$ 1,954,654</td>
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<tr>
<td></td>
<td>2012</td>
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<td>US$ 215,900</td>
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<td>—</td>
<td>US$ 1,709,214</td>
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<tr>
<td></td>
<td>2012</td>
<td>US$ 400,000</td>
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<td>US$ 431,800</td>
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<td>—</td>
<td>US$ 4,801,800</td>
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<tr>
<td>Mr. Seth M. Mersky (2)</td>
<td>2014</td>
<td>US$ 400,000</td>
<td>—</td>
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<td>US$22,936,543</td>
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<td>US$23,336,543</td>
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<td>2012</td>
<td>US$ 400,000</td>
<td>—</td>
<td>US$ 431,800</td>
<td>US$ 3,500,000</td>
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<td>—</td>
<td>—</td>
<td>US$ 4,331,800</td>
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<tr>
<td>Mr. Anthony Munk (2)</td>
<td>2014</td>
<td>US$ 400,000</td>
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<td>—</td>
<td>US$ 5,079,682</td>
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<td>US$ 5,479,682</td>
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<td>2012</td>
<td>US$ 400,000</td>
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<td>US$ 431,800</td>
<td>US$ 2,000,000</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>US$ 2,831,800</td>
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</table>
Example of GlobeInvestor

### Onex Corporation

**OCX | TSX | Management and Diversified**

<table>
<thead>
<tr>
<th>Latest</th>
<th>Change</th>
<th>Volume</th>
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</thead>
<tbody>
<tr>
<td>43.60</td>
<td>-0.09</td>
<td>2,428</td>
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</table>

**TSX data delayed 15 minutes.**

<table>
<thead>
<tr>
<th>Summary</th>
<th>Chart</th>
<th>News</th>
<th>StockTwits</th>
<th>Financials</th>
<th>Analysts</th>
<th>Competitors</th>
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<tr>
<td>Open</td>
<td>43.56</td>
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<tr>
<td>Previous Close</td>
<td>43.69</td>
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<tr>
<td>High</td>
<td>43.66</td>
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<tr>
<td>Low</td>
<td>43.55</td>
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<tr>
<td>Bid x1</td>
<td>43.52</td>
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<td>Ask x1</td>
<td>43.55</td>
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<tr>
<td>52-week High</td>
<td>01/28</td>
<td>45.00</td>
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<tr>
<td>52-week Low</td>
<td>03/02</td>
<td>35.34</td>
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<tr>
<td>Beta</td>
<td>0.793</td>
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<td>Market Cap</td>
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<td>EPS</td>
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<tr>
<td>P/E</td>
<td>--</td>
<td></td>
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<tr>
<td>Forward P/E</td>
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<tr>
<td>PEG</td>
<td>--</td>
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<tr>
<td>Annual Dividend</td>
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<tr>
<td>Yield</td>
<td>0.253</td>
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</tbody>
</table>

**Range:** 1 Day, 5 Day, 1 Year

[View Large Chart]
Public & Subscription Sources for Individuals

- Data mining your own database: RFM – recency, frequency, monetary
- **Canadian Business Resource** (by executive)
- **CharityCan** (Canadian Who’s Who, CRA, NOZA & Political Contributions)
- Financial Post **Directory of Directors** (Print, CD, Online)
- KCI (Ketchum Canada) Research Update – Web & RSS
- Alumni directories (online & print)
- Who’s Who in Canadian Business (defunct 2005) Print & CD
- Top 100’s
- **MLS** - for real estate information (home listing prices)
- **NOZA** – gifts to other organizations
- **PRO** – Prospect Research Online (online) [www.iwave.com](http://www.iwave.com)
  - Power ZOOM, Gifts to Other Orgs, Political Contributions, Wealth Ratings, & Real Estate
- **SEDAR** (online) [www.sedar.com](http://www.sedar.com) for holdings/info for each public company
- **SEDI** (online) [www.sedi.ca](http://www.sedi.ca) for share holdings in other public companies
- **EDGAR** (online) [www.sec.gov/cgi-bin/srch-edgar](http://www.sec.gov/cgi-bin/srch-edgar) - US Securities
- **ZOOM** (online) [www.zoominfo.com](http://www.zoominfo.com) – non subscription site
- Charity Village News (online) [www.charityvillage.com](http://www.charityvillage.com) – Newsbytes
- **PUBLIC** or university libraries

[www.traceychurchresearch.com](http://www.traceychurchresearch.com)
Also Social Media: not just for the young at heart, or those light in the wallet!

As of the 2nd quarter of 2016…

• Facebook had 1.71 billion monthly active users
• Twitter, 313 million monthly active users
• LinkedIn, 450 million members
• Instagram, 500 million monthly active users
Canadian Who’s Who

Canadian Who’s Who Biography


www.traceychurchresearch.com
# KCI Web Updates: Individuals & Gifts

## KCI Sector News

**Have news to share?** [Click here to submit it to us](#)

### Major Gift News

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Gift</th>
<th>Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Toronto, ON</td>
<td><strong>$700,000</strong></td>
<td>June 2014</td>
</tr>
<tr>
<td>Indspire and Pathways to Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>W. Garfield Weston Foundation</td>
<td><strong>$1,000,000</strong></td>
<td>June 2014</td>
</tr>
<tr>
<td>The Salvation Army’s Toronto Grace Health Centre, ON</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gerry and Paula Coleman</td>
<td><strong>$1,200,000</strong></td>
<td>June 2014</td>
</tr>
<tr>
<td>Oakville Hospital Foundation, ON</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CorVan Raay</td>
<td><strong>$5,000,000</strong></td>
<td>June 2014</td>
</tr>
<tr>
<td>University of Lethbridge and Lethbridge College, AB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dr. Bev Robertson</td>
<td><strong>$500,000</strong></td>
<td>June 2014</td>
</tr>
<tr>
<td>Johnson Shoyama Graduate School of Public Policy (JSGSPP), SK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bill &amp; Irma Welikoklad</td>
<td><strong>$1,000,000</strong></td>
<td>June 2014</td>
</tr>
<tr>
<td>Red Deer College, AB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bill &amp; Melinda Gates Foundation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### People on the Move

<table>
<thead>
<tr>
<th>Position</th>
<th>Recipient</th>
<th>Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair, Board of Governors</td>
<td>Pete Merlo, Grande Prairie Regional College (GPRC), AB</td>
<td>June 2014</td>
</tr>
<tr>
<td>Director &amp; CEO (effective July 2, 2014)</td>
<td>Alex Benay, Canada Science and Technology Museums Corporation (CSTM)</td>
<td>June 2014</td>
</tr>
<tr>
<td>Senior Vice President, Strategic Partnerships &amp; Branding</td>
<td>David Hughes, YMCA Canada</td>
<td>June 2014</td>
</tr>
<tr>
<td>Chair</td>
<td>Edward Sellers, Trillium Health Partners, Mississauga, ON</td>
<td>June 2014</td>
</tr>
<tr>
<td>President (effective August 4, 2014)</td>
<td>Dianne Taylor-Gearing, NSCAD University, Halifax, NS</td>
<td>June 2014</td>
</tr>
<tr>
<td>President (effective September, 2014)</td>
<td>Dr. Suzanne Johnston, Niagara Health System, ON</td>
<td>June 2014</td>
</tr>
<tr>
<td>Chief Advancement Officer</td>
<td>Tracy MacLeod, Laurier University, Sudbury, ON</td>
<td>June 2014</td>
</tr>
<tr>
<td>Executive Director</td>
<td>Lesley Mansfield, Halton Learning Foundation, ON</td>
<td>June 2014</td>
</tr>
<tr>
<td>General Manager</td>
<td>Terry Caddo, Canada Blooms Flower and Garden Festival, Toronto, ON</td>
<td>June 2014</td>
</tr>
</tbody>
</table>
### Real Estate Example: iWave PRO

<table>
<thead>
<tr>
<th>Owner Names:</th>
<th>Gerald W Schwartz</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Address:</td>
<td>22140 Pacific Coast HWY Malibu, CA 90265-5027</td>
</tr>
<tr>
<td>Mailing Address:</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Owner Relationship:</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Phone:</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Free and Clear:</td>
<td>No</td>
</tr>
<tr>
<td>Most Recent Purchase Price:</td>
<td>$19,000,000</td>
</tr>
<tr>
<td>Most Recent Purchase Date:</td>
<td>June 10, 2008</td>
</tr>
</tbody>
</table>

#### Property Assessment Details

| Current Value:        | $7,155,027                                              |
| Market Value:         | N/A                                                     |
| Assessed Value:       | $34,797,177                                             |
| Appraised Value:      | N/A                                                     |
| Ass’d. Improvement Value: | N/A                                                   |

#### Property Information

| APN Number:           | 4451-006-038                                            |
| County:               | Los Angeles                                             |
| Property Type:        | Single Family Residence                                 |
| Year Built:           | N/A                                                     |
| Effective Year Built: | N/A                                                     |
| Acres:                | 0.50                                                    |
| Cash/Mortgage Sale:   | N/A                                                     |
| Total Rooms:          | N/A                                                     |
| Total Bedrooms:       | N/A                                                     |
| Total Bathrooms:      | N/A                                                     |
| Garage:               | N/A                                                     |
| Pool:                 | N/A                                                     |

[Click to view larger map]
Salary Estimates: **Monster**

**Executive Jobs in Canada** Browse the largest listing of $100K plus Executive postings in Canada.

**Victimology Certification** Become a Victims Advocate & Support Leadership & Change. Free Guide.

**Become a Bookkeeper** Learn bookkeeping at home with expert training from ICS Canada. [www.ic](http://www.ic)

---

**Similar Jobs**

- Top Government Affairs Executive (Federal Level)
- Account Management Manager
- Accounting Manager
- Accounts Payable Manager
- Accounts Payable/Receivable Manager
- Accounts Receivable Manager

<table>
<thead>
<tr>
<th>Branch Manager I</th>
<th>Methodology</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA National Averages</td>
<td></td>
</tr>
<tr>
<td>Median Salary + Bonus</td>
<td><strong>C$73,381</strong></td>
</tr>
</tbody>
</table>

- 10%: C$48,036
- 25%: C$60,115
- 75%: C$90,834
- 90%: C$106,725

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Ontario Public Sector Salary Disclosure
(The Sunshine List)

*Note: many physicians are cross-appt with a university & have salaries with both!

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Salary 1</th>
<th>Salary 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERIAN</td>
<td>Clinician Investigator</td>
<td>$112,008.00</td>
<td>$576.52</td>
</tr>
<tr>
<td>CARMICHAEL</td>
<td>Chief, Dentistry</td>
<td>$193,032.24</td>
<td>$1,013.33</td>
</tr>
<tr>
<td>CHAU</td>
<td>Senior Scientist</td>
<td>$150,010.15</td>
<td>$720.72</td>
</tr>
<tr>
<td>FALZON</td>
<td>Senior Director, Rehab and Complex Continuing Care/Chief Nursing Executive</td>
<td>$119,739.10</td>
<td>$762.50</td>
</tr>
<tr>
<td>FEHLINGS</td>
<td>Physician Director</td>
<td>$292,963.13</td>
<td>$1,312.74</td>
</tr>
<tr>
<td>GUIROD</td>
<td>Director, Research Operations</td>
<td>$105,623.20</td>
<td>$540.54</td>
</tr>
<tr>
<td>HAANSTRA</td>
<td>Chief, Communications and Public Affairs</td>
<td>$144,917.75</td>
<td>$715.56</td>
</tr>
<tr>
<td>HANCOCK</td>
<td>Senior Director, Facility Management</td>
<td>$120,851.62</td>
<td>$603.50</td>
</tr>
<tr>
<td>HATTON</td>
<td>Senior Director, Information Systems</td>
<td>$120,703.30</td>
<td>$630.58</td>
</tr>
<tr>
<td>HUNG</td>
<td>Physician</td>
<td>$100,381.15</td>
<td>$0.00</td>
</tr>
<tr>
<td>HUNTER</td>
<td>Vice President, Human Resources and Organization Development</td>
<td>$203,496.54</td>
<td>$1,506.18</td>
</tr>
<tr>
<td>JARVIS</td>
<td>President/Chief Executive Officer</td>
<td>$472,029.64</td>
<td>$9,860.50</td>
</tr>
<tr>
<td>JIMINEZ</td>
<td>Physician</td>
<td>$165,143.94</td>
<td>$761.86</td>
</tr>
<tr>
<td>KAWAMURA</td>
<td>Physician</td>
<td>$184,670.19</td>
<td>$702.54</td>
</tr>
<tr>
<td>KILLEY</td>
<td>Director, Organization Development and Learning</td>
<td>$106,772.00</td>
<td>$1,024.14</td>
</tr>
</tbody>
</table>
Salary Estimates: Featured Articles

**Total physicians:** $295,606

**By specialty:**
- Anesthesia, $323,975
- Dermatology, $385,325
- Family Medicine, $241,077
- General surgery, $386,723
- Internal medicine, $371,795
- Neurology, $277,928
- Obstetrics/gynecology, $401,465
- Ophthalmology, $676,551
- Orthopedic surgery, $372,742
- Pediatrics, $268,172
- Physical medicine, $255,972
- Plastic surgery, $337,874
- Psychiatry, $215,434
- Thoracic/cardiovasc surgery, $467,794
- Urology, $430,358

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**SECOND OPINION**

**How much are Canadian doctors paid?**

ANDRÉ PICARD
The Globe and Mail
Published Wednesday, Jan. 23 2013, 11:41 PM EST
Last updated Thursday, Jan. 24 2013, 7:26 PM EST

How much are Canadian doctors paid?

If you read the newspaper headlines, you will think they are paid, on average, about $307,000. If you ask doctors – and family docs in particular – they will tell you their take-home pay is less than that of many plumbers and auto workers.

What’s perplexing is that both those statements are true.
Share Values

• Look up your prospect in the Directory of Directors and list the companies where he/she serves on the board
• Visit SEDAR www.sedar.com to retrieve the information circular for all of these companies and record the number of shares your prospect holds in each
• Visit SEDI www.sedi.ca to retrieve share ownership in other public companies
• Visit EDGAR to retrieve share ownership in US

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Additional Resources – Used Daily (when time allows)

- Online news updates, Twitter, RSS Feeds → Reader (e.g. Feedly – push)
- Regional Newspapers & Magazines
- National Newspapers & Magazines
  - Globe & Mail
  - National Post & Financial Post
  - National Post Entrepreneurs
  - Canadian Business
- Regional Directories – Vernon’s (print) – can find wacky info
- Public & university libraries
- Canadian Newswire – News alerts
- TSX/TMX & Dow Jones (what’s trending)
- Chronicle of Philanthropy (US online)
- Financial Post Canadian Demographics
- Canada411 (online) – Reverse Look-Up
- Google – News alerts, Street View
- FP Infomart (online) – News alerts
- Factiva (online) – News alerts
- StatsCAN reports & tables

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Prospect Management

Data Mining and Modeling
Once you have your list of prospects in your database, how do you prioritize which prospects to visit first? What programs best suit a prospect: annual, planned, and/or major giving? Prospect rating varies from in-house rating systems to custom rating tools from external companies.

• **Data Mining**: Automated or manual extraction or query of information from a constituent database (Henze, 2004).

• **Predictive Modeling**: Discovery of underlying meaningful relationships and patterns from historical and current information within a database (and external info) and using these findings to predict *individual* behaviour (Henze, 2004). (e.g. Analytics)
Setting up Capacity & Affinity Ratings

**Capacity** estimates what a prospect is able to give (think *predictive & external*)

- Researchers may look at what donations, if any, a prospect has given to other organizations or foundations.
- An *individual’s* salary may be found on SEDAR, if he or she is a top executive of a public company.
- *Corporations* often have written commitments to community support on their web pages or in their annual reports.
- *Foundations* usually list their totals assets and also their gift ranges.
- From all of these sources, and more, a researcher may be able to estimate how much a prospect is able to give to any organization.
Setting up Capacity & Affinity Ratings

**Affinity** rates *how likely* a prospect is likely to give to *your* organization based on a closeness or connection with your organization.

- In health-care organizations, a grateful patient may have a high affinity to your institution.
- Unfortunately, or fortunately, because of the privacy laws in Canada, unless a grateful patient comes forward to declare his strong affinity, we may never know it.
- But, there are other ways to see affinity:
  - Past donations to your own organizations or others like it
  - Volunteer activity in your organization or others like it
  - Common business associations with your organizations, and so on.
Setting up Capacity & Affinity Ratings

For **capacity**, researchers & solicitors can set up potential gift ranges, such as:

- Under $1,000
- $1,000 – 4,999
- $5,000 – 9,999
- $10,000 – 24,999
- $25,000 – 49,999
- $50,000 – 99,999
- $100,000 – 499,999
- $500,000 – 999,999
- $1 million or more

Similarly, **affinity** ratings can be created, such as:

- 0 – Unknown
- 1 – Low
- 2 – Moderate
- 3 – Excellent

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Capacity vs Affinity

High Capacity
Low Affinity

Major Giving Potential
Needs Cultivation

Move

High Capacity
High Affinity

Major Giving Potential High
Priority MG Prospects

Giving Potential Low
Affinity Low
Don’t Waste Resources

Major Giving Potential Low
Affinity High
Good Planned Giving Prospects

Low Capacity
Low Affinity

Low Capacity
High Affinity

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What’s happening at your organization?

• Has anyone been involved in a fundraising campaign?
• Has anyone been a volunteer on a board for a NFP organization?
• What would be the fundraising priorities at your organization?
• How does your organization do their fundraising now?
• Any fundraising war stories?
As review: where are we going with this?

- A charity deserves targeted, relevant, well-timed asks for good use of donor dollars
- Researchers are uniquely skilled to complement a development team to meet their goals with well-matched prospects
- Researchers work strategically with development teams to provide the “right prospects” for the “right programs”, at the “right gift amount”, at the “right time”
- Use your research resources to find: individuals, corporations & foundations that match a charity’s mission & financial goal
- Manage the database to be able to easily add your prospects, rate them, and extract them according to fundraising needs
- Part of a researcher’s worth is steering the fund development team AWAY from those prospects who have neither the capacity NOR the affinity to give to your organization!
Want to learn more?

Western University, MLIS Program:
Winter 2017
LIS 9509: Prospect Research in Fundraising
Instructors:
• Tracey Church, MLIS
  – Tracey Church & Associates, Research + Consulting Services
• Izabela Piasecka-Latour, MLIS
  – Prospect Research Manager, Canadian Arthritis Society

University of Toronto, iSchool MI Program
Winter 2017
INF1005H: Introduction to Prospect Research in Nonprofit Organizations
• Instructor, Jennifer Zhang, Director, Knowledge & Systems at Sunnybrook Foundation

www.traceychurchresearch.com
Jobs in Prospect Research

APRA Canada Job Postings
http://www.apracanada.ca/jobs

AFP (Association of Fundraising Professionals)
http://afptoronto.org/jobs/
Senior Specialist, Research Services

Date Posted: January 9, 2014
Position Status: Temporary (1 year contract)
Available: Immediately

Description of the Position:
The Senior Specialist, Research Services provides responsive, accurate, precise donor intelligence and information that informs the decision-making of fundraisers so that a desired plan of action is confirmed; and identifies prospects whose connections, interest, capacity or philanthropic inclination predispose them to support hospital fundraising priorities. The position reports directly to the Director, Research Services.

Duties and Responsibilities:
- Provides timely, responsive research service to Foundation staff in accordance with the Research Service Level Agreement.
- Collects information, interprets, analyzes, assesses, evaluates and synthesize data into a coherent and accurate report to support planning and decision-making by fundraisers.
- Consults with fundraisers to establish timeframes and clarify research requirements.
- Collaborates with the Research Services Team to build create prospect identification strategies to meet overall departmental goals.
- Conducts strategic prospecting using proprietary information and/or electronic print resources to identify major gift prospects.
- Ensures that relevant information regarding donors and prospects is up-to-date and accurate on the donor database and tracks strategic research data on the database to facilitate ongoing and future prospect identification.
- Shares relevant information with the Foundation’s fundraisers to facilitate the development of prospect management strategies to better cultivate and solicit major gift prospects.
- Review and monitor major news publications for announcements and news items of interest concerning major gift donors, prospects, and the Foundation.

Required Qualifications:
- Minimum 5+ years of work experience related to prospect research
- Master of Information & Library Science
- Proven record of accomplishments in the fundraising research environment
- Experience working with word processing, database management and spreadsheet software, online subscription services/databases.
- Exceptional technical skills, including data analysis, segmentation and screening.
- Experience, coursework, or other training in fundraising principles and practices, including the participation in the Association of Professional Researchers for Advancement and other professional development activities.
- Excellent analytical, verbal and written skills. Ability to synthesize information from multiple sources into a coherent and accurate profile report presentation format that is used to support planning and decision-making.

About SickKids Foundation:
Established in 1972, SickKids Foundation raises funds on behalf of The Hospital for Sick Children (SickKids) and is the largest charitable funder of child health research, learning and care in Canada. Philanthropy is a critical source of funding for SickKids—one of the world’s foremost pediatric health care institutions. For the fiscal year ending March 31, 2013, SickKids Foundation contributed $92.6 million to research, learning and care—the largest amount in its history.

As a national charity, SickKids Foundation not only invests in the important work taking place at SickKids, it also invests in national and international initiatives to benefit children in Canada and around the world. This commitment is true to the spirit of the Foundation’s founders, who articulated a vision for the Foundation that went well beyond the hospital walls 40 years ago.

Together we will change the future of children’s health.

Hours: 9 am to 5 pm Monday to Friday
Available to: Internal and External Applicants
Deadline: Internal: January 16, 2013
External: January 23, 2013
Submit Resume to: careers@sickkidsfoundation.com

Only those applicants selected for an interview will be contacted. No phone calls please.
Questions?

Tracey Church, MLIS
Tracey Church & Associates, Research + Consulting Services
www.traceychurchresearch.com
traceychurch024@gmail.com

Katherine Scott, MA
Senior Manager, Prospect Research, Canadian Red Cross
www.redcross.ca
katherine.scott@redcross.ca