

*Flying Solo: Working with fundraisers, demonstrating your value, and keeping your cool in a solo shop*



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SESSION DATE: Wednesday, October 12, 2016

SESSION TIME: 1:45pm - 3:00pm

# Prospect Researchers



What my friends think I do



What my mom thinks I do



What fundraisers think I do



What my kids think I do



What I think I do



What I REALLY do

# Agenda

## 1) Working in a one-researcher shop

- Building your product suite
- Working with fundraisers
- Advocating for yourself
- Demonstrating your value (ROI)

## 2) Freelancing

- Are you ready to fly solo?
- Setting your rate
- What's in your tool belt?
- Finding clients
- Managing your business

## 3) Questions



# Building your product suite

- 1) Creating templates that support meaningful, specific and concise research
- 2) Reports & Analysis
- 3) Prospecting and prospect clearance
- 4) Educating your fundraising colleagues on the value of research (and managing expectations)
- 5) Assembling your network of volunteers



# Expanding your product suite

- 1) Pipeline management
- 2) Environmental scans
- 3) Case statements
- 4) Campaign development
- 5) Gift pyramids
- 6) Stewardship and grant writing



# Working with fundraisers

- 1) To whom are you reporting? Where are you in the org chart?
- 2) Capitalizing on broad understanding of your organization's pipeline
- 3) Information & knowledge management: fighting confirmation bias
- 4) Talking to your fundraiser
- 5) Event attendance, donor calls, debriefings



# Demonstrating your ROI

- 1) Measure everything
- 2) Assess monthly
- 3) Track kudos
- 4) Evaluate subscription resources annually



# Are you ready to fly solo?

- Experience
  - 52% of respondents to the 2014 APRA Canada Survey had 5+ years experience, and 11% had 11+ years experience.
- Be prepared to be the expert
- Earning requirements and resources
- Entrepreneurial spirit





# Are you ready to fly solo?

Setting up your business

- Registering with CRA
- Website, social media
- Recommendations
- Value proposition and finding your niche



# Setting your rate

- Hourly or project-based
- *“If someone asks you to work for free because it will be great exposure, ask them to specify what that means. If they can’t, don’t.” – Jon Acuff*
- Rule of thumb: hourly rate x 2-3 = freelance rate
- Don’t forget about non-billable work and costs of doing business!



# What's in your tool belt?

- 1) Product suite+
- 2) Research resources
- 3) Kudos



# Finding clients

- 1) Networking
- 2) Cold calling



# Managing your freelance business

- Registering and setting up your business
  - CRA stuff
  - Accounting
  - Setting your rate
- Identifying your network (relationship mapping!)
- Marketing your services
- Confidentiality



# Resources for freelancers (and solos too!)

- APRA (mentoring program, Prospect\_L, webinars, socials)
- AIIP (Association for Independent Information Professionals)
- Accounting tools
- LinkedIn
- Technology training
- Co-working spaces
- *Sole Searcher* (Preeti Gill)



# Questions & Comments

