

Prospect Research and Frontline Fundraising: Communication and Collaboration

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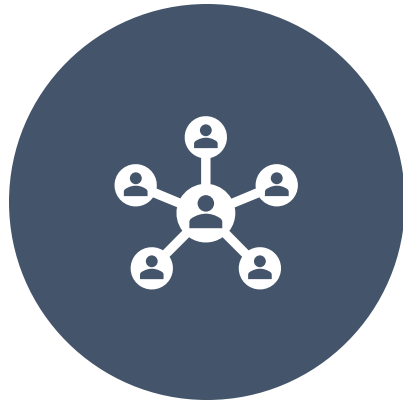
Welcome!

Three learning objectives:

- Learn to collaborate and communicate effectively between frontline fundraisers and prospect researchers
- Create a relationship to achieve individual and collective goals
- Turn prospects into engaged alumni and donors



How we communicate and collaborate for success



RELATIONSHIPS!

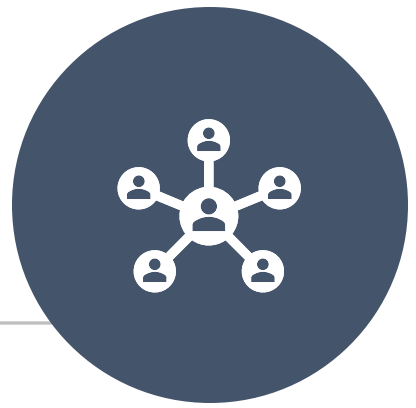


PROSPECTS!



PROBLEM SOLVING!

Relationships!



MUSIC

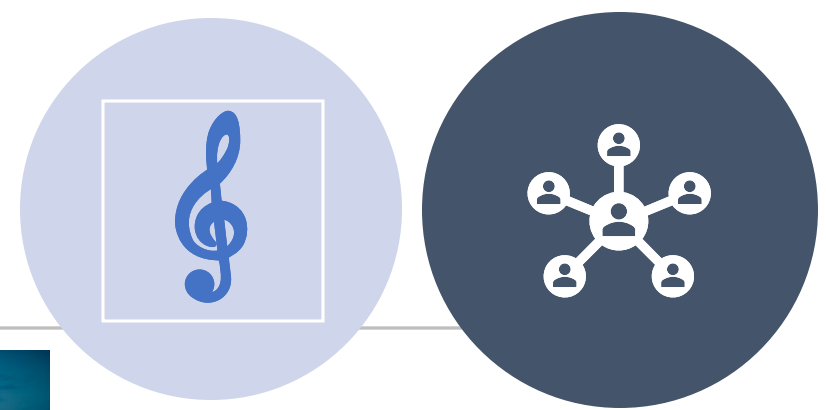


BASEBALL



FOOD

Relationships!

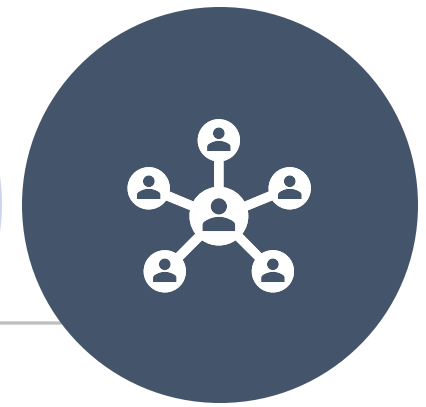
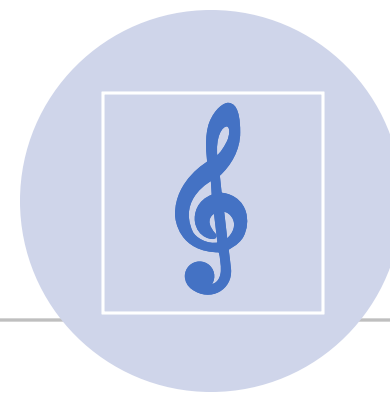


What does Eli/fundraiser want and need?



What does Adam/researcher + analyst want and need?

Fundraiser Perspective

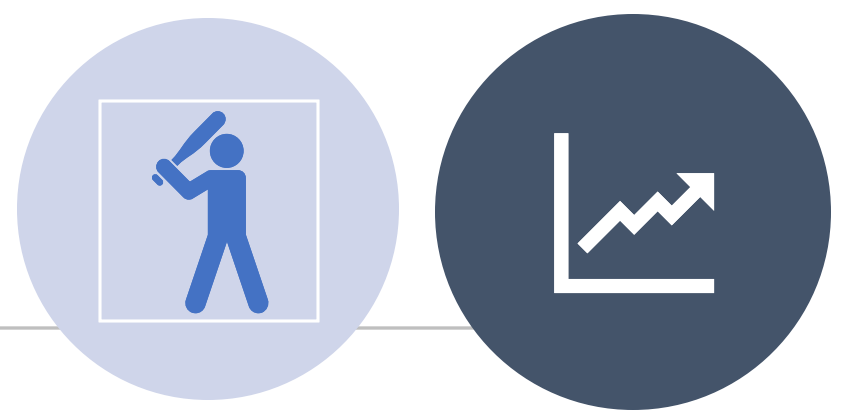


What does Eli/fundraiser want and need?



Wealthy ≠ generous

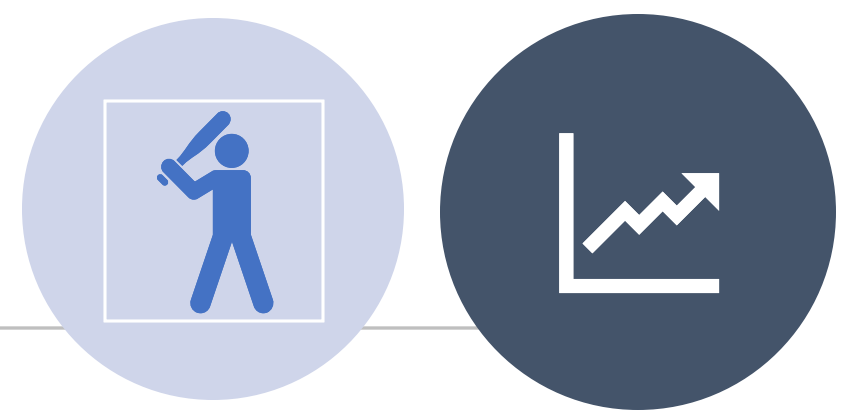
Prospects!



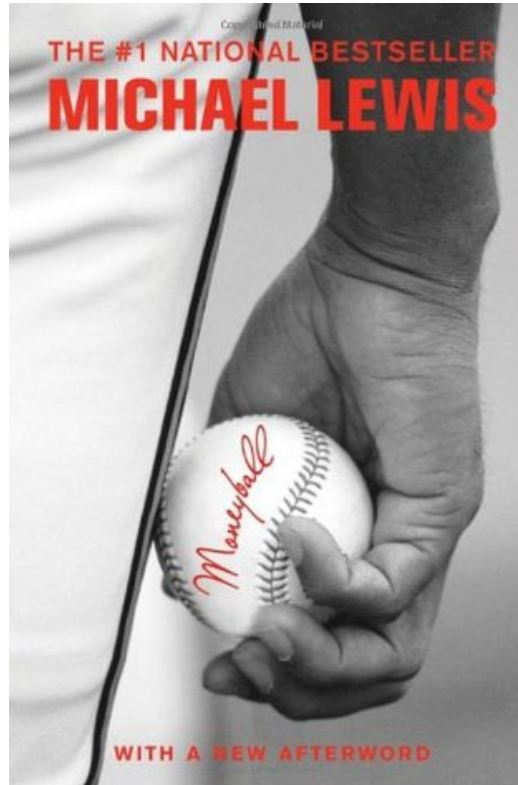
- Question conventional wisdom:
 - Data analysis
 - Who is being ignored?
- What we look for in a prospect:
 - *Organic* reasons to contact prospects/donors
 - Opportunities for stewardship
 - Demonstrations of affinity/participation



Prospects!



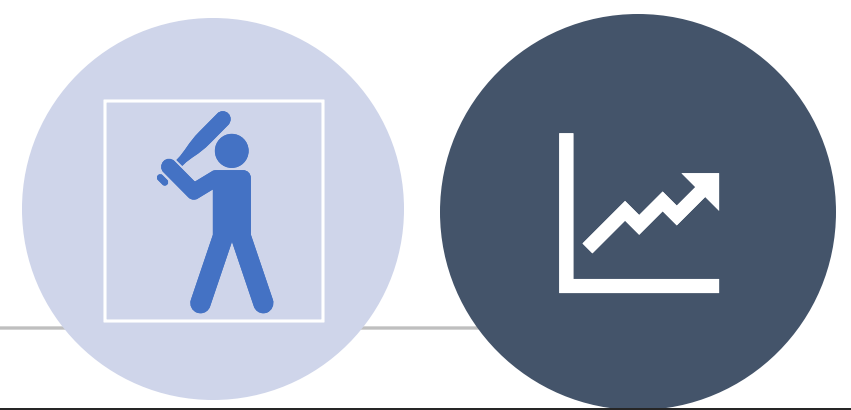
- Affinity *first*
- Wealth with no interest = *fantasy fundraising* = ☹️



“People...operate with beliefs and biases. To the extent you can eliminate both and replace them with data, you gain a clear advantage.”

—Michael Lewis, [Moneyball: The Art of Winning an Unfair Game](#)

Prospects!



- Event attendees
- Recent donations
- Loyal donors
- Potential

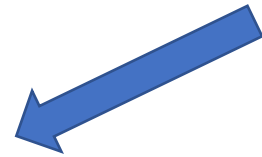
Hi Ben,

Hope you're well.

A discovery prospect of yours, [REDACTED], just made an annual gift of \$50. If you'd like to thank the donor as a touchpoint, please go ahead – hopefully he is responsive.

Thanks (on behalf of FASE!).

Best,
Adam



Hi Adam,

Thank you very much for your note – I will reach out to [REDACTED] to thank him and to invite him to meet again as he was unresponsive to my first invitation. Thanks for keeping me in the loop!

Have a great day,

Ben

Case Studies

Donor # 1

- Affinity
 - "Her father, husband, and now daughter are all graduates of the University. She feels it is important for her family to contribute back to UofT since it has always been so important to her and her parents"
 - 2012- student award in parent's memory
 - No contact from advancement for 2 years
 - No donations for 3 years
- Capacity
 - \$50,000 previous gift

7/27/2016	\$240.00
6/15/2016	\$240.00
7/8/2013	\$2,086.00
10/29/2012	\$50,000.00
5/9/2007	\$1,907.00
12/15/1992	\$25.00
6/14/1991	\$25.00
12/20/1990	\$25.00
12/31/1987	\$20.00
12/15/1986	\$10.00
11/13/1985	\$10.00

Case Studies

Donor # 2

Hey Eli,

Take a look at [REDACTED] Has established a BPP before. Husband, daughter, father all U of T grads. I have old research on the daughter I am attaching.

Thanks, Adam. Meeting request sent!

Meeting booked, wish they were all that easy! Thanks, Adam.

July, 9, 2020

9:38 AM

11:45 AM

4:06 PM

Case Studies



Meeting Preparation

Giving history

Previous interactions with advancement

Recent student award recipients and report



Meeting Objectives

Learn about her connection to U of T

Donor service

- Student award
- Alumni engagement

Gauge interest in additional giving (annual, major, planned)

Case Studies



Meeting Results

Connected her business with University's
Employer Recruitment and Engagement Team

Learned her business is currently in acquisition
mode and liquid capital is not available

Pivoted to planned giving

Case Studies



Gift

Confirmed planned gift \$200K

Case Studies

- Follow Up

November 9, 2020

Hi Adam,

Long loop around on this, I've submitted a bequest from [REDACTED] for posting. Unfortunately, it's toward her already established BPP so won't hit the A&S books.

Thanks again for suggesting her as a prospect!

Problem Solving!



Identify barriers

Who can solve which problem?

Case Studies

Donor # 2 – Problem Solving!

- Affinity
 - Alumnus
 - Leadership annual giving donor - \$5K
 - No advancement contact in 4 years
- Capacity
 - \$5K annual supports suggests MG capacity

Case Studies



Meeting Preparation

Giving history

Previous interactions with advancement



Meeting Objectives

Affinity

Suggest student award major gift

Case Studies



Meeting Results

Father did not attend University but ensured she would be able to

Donates to extend her father's value on education

Daughter works at UTSC

Asked if she had ever considered creating a scholarship

Suggested redirecting her annual support as a major gift pledge

Matching gift opportunity

Case Studies



Challenges

Can't make a \$25K gift

Immediate impact

Immediate matching

Program and campus specific

Case Studies



Solutions

Can't make a \$25K gift – 5 year pledge

Immediate impact – annual gift

Immediate matching - department

Program and campus specific

Case Studies



Gift

\$30K pledge over 5 years (\$5K endowed, \$1K expendable/year)

Expendable matched by the department until endowed matching begins

Case Studies

Donor # 3 – Relationships! Prospects! Problem solving!

- Affinity
 - Alumnus
 - Deceased mother also an alumnus
 - 1 donation - \$1,000 (2016), lapsed for 3 years
 - To specific scholarship
 - No documented advancement interactions
- Capacity
 - Unknown
 - \$1,000 gift suggests LAG capacity

Case Studies



Meeting Preparation

None



Meeting Objectives

Learn about her connection to U of T

Alumni engagement

Gauge interest in additional giving (annual, major, planned)

Case Studies



Meeting Results

Mother

Attended UofT from the West Indies and became a citizen

Successful academic career

Provided donor with opportunities for education and success

Pledged a continuing monthly donation of \$100

Consideration of donating an existing life insurance policy

Case Studies

- Continued Engagement
 - LAG stewardship and GP cultivation
 - Stopped responding
 - Cancer diagnosis
 - Critical illness insurance
 - Something good from something bad

Case Studies

- Student Award
 - Matching funds
 - Mother's memory
 - International students

Case Studies

- Match her own gift
- Shifting monthly payments
 - Expendable/endowed

Year	BOY Fund	Deposit	EOY Fund	Award	Top Up	Annual Payment	Monthly Payment
1	\$25,000	\$2,500	\$27,500	\$1,000	\$1,000	\$3,500	\$292
2	\$27,500	\$2,500	\$30,000	\$1,100	\$900	\$3,400	\$283
3	\$30,000	\$2,500	\$32,500	\$1,200	\$800	\$3,300	\$275
4	\$32,500	\$2,500	\$35,000	\$1,300	\$700	\$3,200	\$267
5	\$35,000	\$2,500	\$37,500	\$1,400	\$600	\$3,100	\$258
6	\$37,500	\$2,500	\$40,000	\$1,500	\$500	\$3,000	\$250
7	\$40,000	\$2,500	\$42,500	\$1,600	\$400	\$2,900	\$242
8	\$42,500	\$2,500	\$45,000	\$1,700	\$300	\$2,800	\$233
9	\$45,000	\$2,500	\$47,500	\$1,800	\$200	\$2,700	\$225
10	\$47,500	\$2,500	\$50,000	\$1,900	\$100	\$2,600	\$217
11	\$50,000	\$0	\$50,000	\$2,000	\$0	\$0	\$0

Case Studies

- Solution
 - Monthly donations to endowed
 - Annual gift to expendable
- Story feature
- Continued GP cultivation

Case Studies



Homework!

	How <i>*do*</i> you now?	How <i>*can*</i> you better?
Harness your relationships		
(Re-)think the value of your prospects/portfolio		
Solve problems, remove barriers		

Thank you!

- Eli Clarke: clarke27@mcmaster.ca
- Adam Fox: adam.fox@utoronto.ca