



Swinging for the Fences: Identifying, Presenting, and Managing Transformational Prospects at SickKids Foundation

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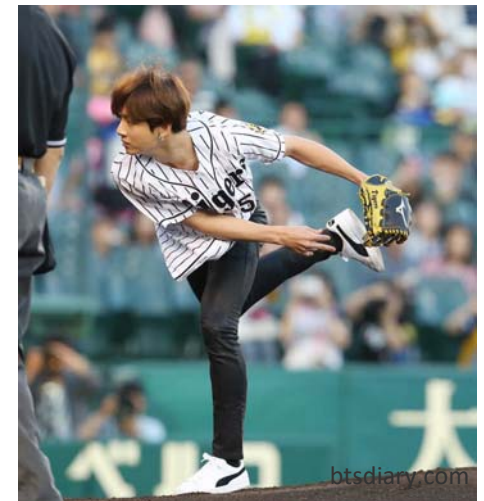
Land Acknowledgement





Batting Order

- Background
- Process
- Looking ahead





The Pitches

- Prospect identification strategies
- Presenting new prospects to senior fundraisers
- Data maintenance and reporting
- Learnings and future enhancements



A League of Their Own (1992)



Survey - Share in Chat

- What is one thing that you hope to learn or discuss at this session?





Business Analytics & Data Science (BADS)

- Research is one of three teams in BADS:
 - Research Services
 - Analytics
 - Data Warehouse
- BADS is one of three teams in the Business Intelligence & Information Technology (BIIT) team





SKF Lineup



Andre Bernardo

Coordinator,
Research Services



Caitlin Aber

Senior Specialist,
Research Services



Christine King

Senior Specialist,
Research Services



Maria Cheung

Associate Director,
Prospect Research
& Market Intellig...



Suzy Mack

Senior Specialist,
Research Services



Our Bases

- Prospect research
- Prospect identification
- Prospect & data management
- Fundraiser partnership





Survey – Share in Chat

- Do you have prospect clearance meetings where you regularly present newly identified prospects to fundraisers?





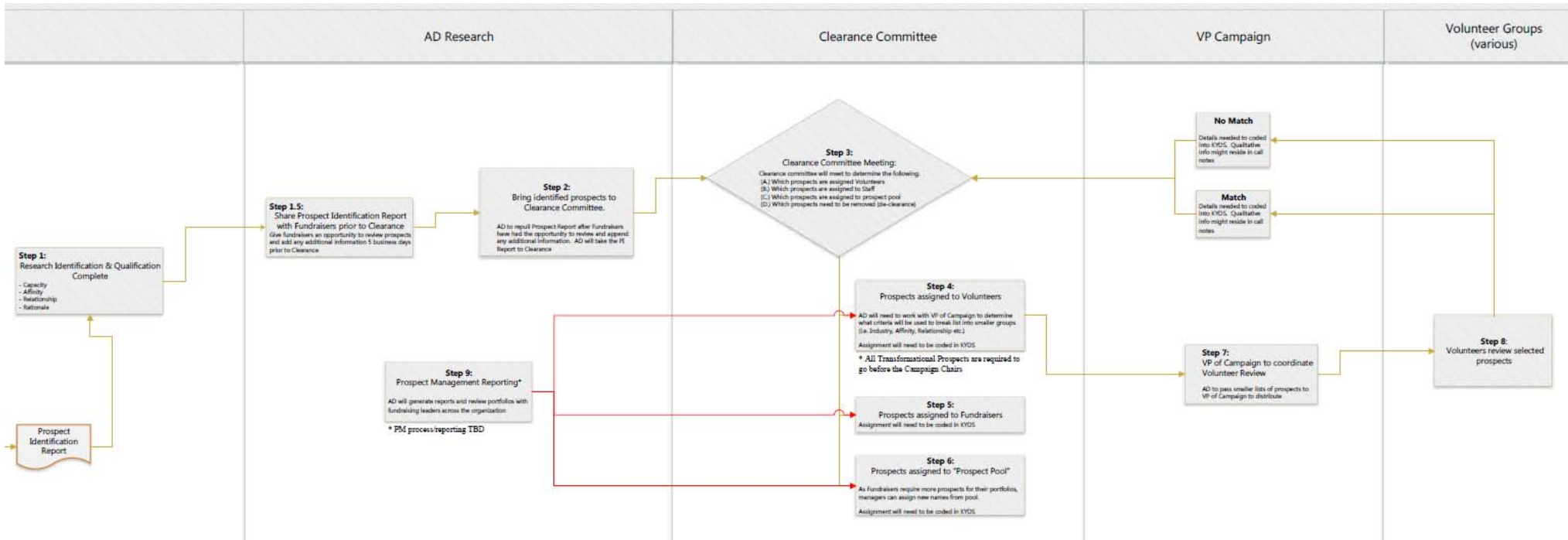
Stepping Up to the Plate

- Prospect identification at SKF
- Gaps
- Why now?





Prospect Clearance Meeting Concept





Prospect Clearance Meeting

- Overview
 - Objective
 - Prospect Clearance Committee
 - Agenda
 - Roles & Responsibilities
 - Post-meeting
 - Feedback
- Other avenues to roll out Research-Identified Prospects





Prospecting

- Sources:
 - News (IPOs, M&A, market trends, gift announcements)
 - Previously-identified prospects
 - Major gift model names with transformational potential
 - Researcher “sixth sense”





Prospecting

- Qualification:
 - Wealth assessment (new capacity rating system)
 - Connections to SickKids
 - Other philanthropy
 - Due diligence (watch out for curveballs!)



Johnny Baseball **(ID654321, No PM)**

Former professional baseball player

- In MLB from 2007-2019, played in Toronto from 2015-2019

Disclosed SickKids Relationship(s):

- Parent of a patient

Volunteer Connections:

- Board member John Smith sits on the board of Concussion Research Canada with Johnny Baseball.
- Hospital Trustee Jane Doe is a partial owner of Johnny Baseball's former baseball team.

SickKids Lifetime Giving:

- Johnny Baseball has donated \$2,632 (2015-2021), all via the Baseball Challenge third party event.

Potential Gift Range: \$1M-\$5M

Wealth Indicators:

- Johnny Baseball signed a 5-year, \$50M contract with the Toronto Club in 2014.
- Johnny and his family live in postal code M5P 1M7 in the Forest Hill neighbourhood of Toronto. The average dwelling value for this postal code is \$5.6M.

Philanthropy:

- Upon his retirement in 2019, Johnny announced a \$2M donation to the Toronto Baseball Club Foundation to support youth baseball programs.
- Johnny joined the board of Concussion Research Canada and announced a \$1M campaign gift in 2021.

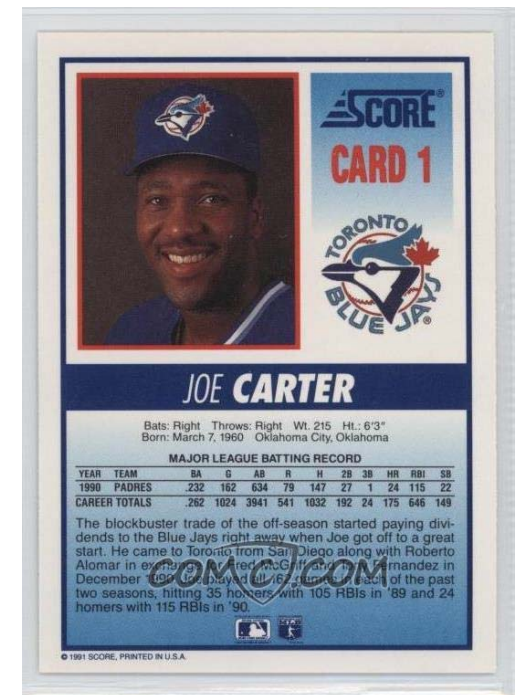
Additional notes:

- Johnny Baseball was born and raised in Etobicoke.
- He has two children aged 3 and 5.



Bases Loaded

- Blackbaud CRM
- Data tracking & reporting
- Prospect management
- Other uses for data





Home Run

Wins

- Partnership with other teams
- Research visibility & recognition
- Enhanced “prospect pool” — 150+ net new names
- >80 Transformational names over 2021

Learnings

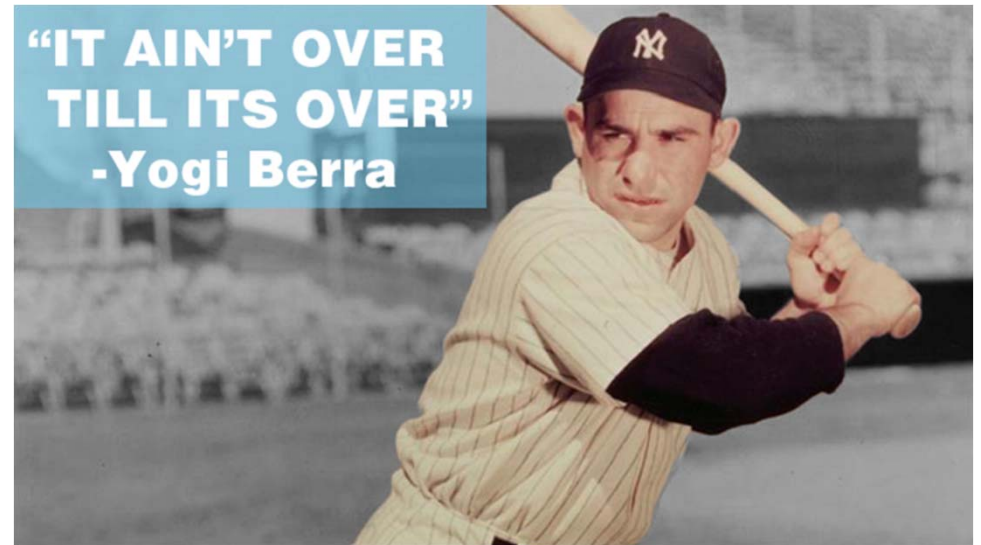
- Long game
- Defining success
- Resourcing





Extra Innings

- Prospect management policy
- Strive for diversity in prospecting
- Research enhancements
- Keep prospecting!





Thank You! Questions?

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