apra | Canada

25 in '26

Apra Canada Tech Talk

Part I

ChairtyCAN, Manifold Data Mining and Sereniti Analytics

Lineup

CharityCAN	Manifold Data Mining Inc.	Sereniti Analytics
		
Robert Fedderson *VP, Sales & Marketing*	Jannis Mei *CEO*	Sounithtra Vongsaphay *Founder & CEO*

Charity CAN

APRA CANADA 2026 · TECH TALK

2026 and Beyond!

“how far we’ll goooooo...”



- Relationship map search
- AI Summaries
- CharityCAN for RE NXT

Robert Fedderson, VP of Sales, CharityCAN

THE RESEARCH WORKFLOW

Where research time goes



Finding the connection

Your board is extremely well connected, but this extremely valuable asset isn't being used

NOW HANDLED BY

Relationship map search



Writing the brief

How much info do your gift officers actually need? Are they getting in when they need it?

NOW HANDLED BY

AI Summaries



Updating the CRM

Does it feel like you're doing the same work twice?

NOW HANDLED BY

CharityCAN for RE NXT

NEW FEATURE 1

Search a relationship map for giving prospects

1 **Start from someone you know**
A board member, volunteer, or loyal donor.

2 **Map their network**
CharityCAN draws their connections from Canadian public records.

3 **Search inside the map**
Filter that network for people with giving history or capacity.

4 **See the path**
Relationship Paths show how your contact links to each prospect.

CONNECTIONS COME FROM

- Charity boards
- Corporate boards
- Federal corporations
- Donation records

NEW FEATURE 2

AI Summaries

A readable brief, built from the profile you would otherwise summarize by hand.

One profile, one brief

Giving history, board roles, career and capacity indicators in a short narrative.

Grounded in your data

Written from CharityCAN records and the RE NXT constituent record, with web search optional.

The researcher stays in control

Review and edit the brief before anyone else sees it.

Sent to RE NXT

Push the summary straight to the constituent record.

WORKS ON

Individual, corporate and foundation profiles

NEW FEATURE 3

CharityCAN for RE NXT

ChartyCAN research, inside the system your team already works in.

Inside the constituent record

Relationship maps, donations, wealth estimates and compensation, shown in RE NXT.

Profile exports from RE NXT

Export a CharityCAN profile without leaving Raiser's Edge.

No copying and pasting

Research lands on the record directly, AI Summaries included.

One source of truth

Researchers, gift officers and managers work from the same record.

BUILT FOR

Blackbaud Raiser's Edge NXT

PUTTING IT TOGETHER

Find, understand, act

FIND

Search the relationship map

Surface prospects already connected to people you know.

UNDERSTAND

Generate an AI Summary

Turn each prospect's profile into a brief you can review.

ACT

Send it to RE NXT

The gift officer sees it on the record they already use.

The research moves from the map to the gift officer without being retyped.

CharityCAN

THANK YOU

Questions

See all three live at the CharityCAN booth. Bring us a prospect name and we'll show you who they know.

Robert Fedderson, VP of Sales charitycan.ca info@charitycan.ca



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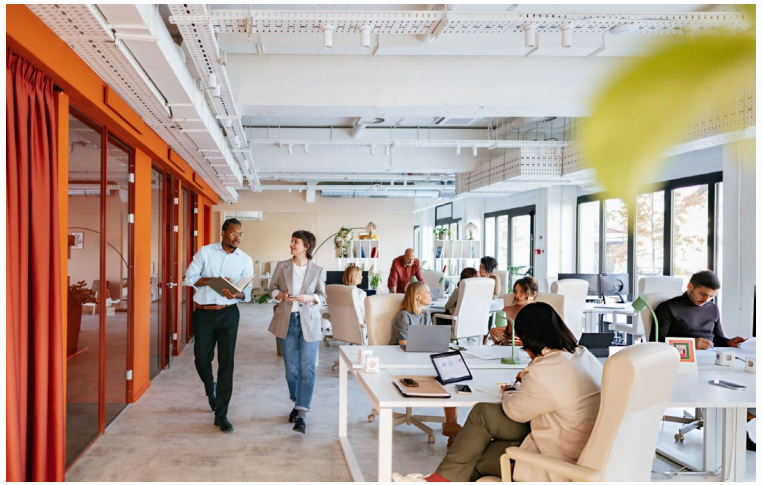


A Tale of Two Foundations Case Study

Evolution of Prospect Research at 2 Foundations

Background of 2 Foundations

- One very large foundation
  - Prospect Researchers: ~10
  - Advancement Team: 200+
  - Constituents:~500,000 + ~15,000/year
- One smaller foundation
  - Prospect Researchers: ~0
  - Advancement Team: 3 people
  - Constituents: ~10,000 + ~100/year





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Original Prospect Research Approach

- Large Foundation
  - Randomly assign selection of biggest donors, large recent donors, and other recent constituents to prospect research team
  - Impossible to systematically look through ~15,000 new names a year + work on backlog
- Small Foundation
  - Look up people's home prices sporadically
  - Ask the top 5 biggest donors for more money

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First Step in Evolution

- Large Foundation started using some American approaches to estimate gift capacity
  - Did not have estimates of net worth data for 500K constituents
    - So used best guess at comparable home value for 10s of thousands of constituents as starter
  - American approach: annual gifts = 6% of annual income, or 5-year giving capacity = 5% of net worth
  - Estimates were wildly off
  - Canada
    - Average house price in GTA = $1 million
    - Who is giving $50K over 5 years?
    - If your household income is $100K+, who is giving $6K/year?



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How do we get Net Worth Data?

- Start with similar basics
  - Real estate listings
  - Property assessments
  - Income
  - Business equity
  - Investments and debts
  - Wealth surveys
  - Consumer surveys
  - Consulting firms
  - CMHC, Canadian Bankers Association
  - etc.

- Systematically ingest for large portions of Canadians
- Apply modelling across all of Canada
- Output at 6-digit postal code level for every 6-digit postal code in Canada
  - Privacy-compliant + still granular

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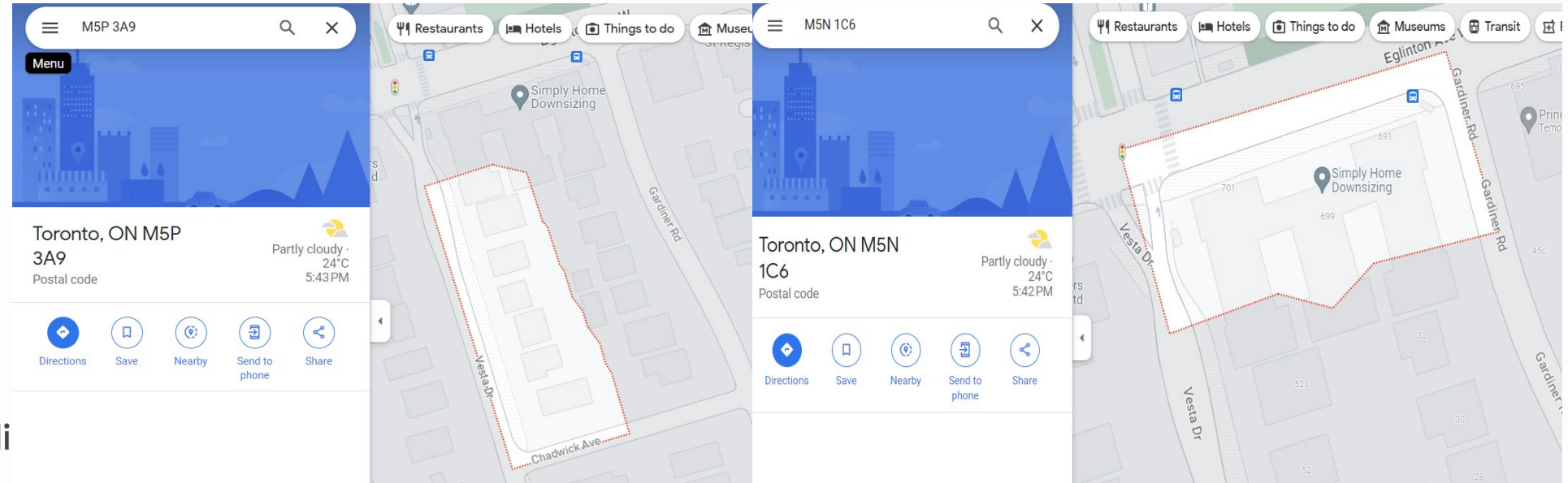
How does a Foundation use Manifold's data?

1. Attach to their constituent records at 6-digit postal code level
2. Use to narrow down prospect research lists
3. Use in donor profiling and segmenting
4. Use in modelling
    a) Mid-level to major gift pipeline
    b) Lapsed donor reactivation
    c) Legacy giving
    d) Media channel response

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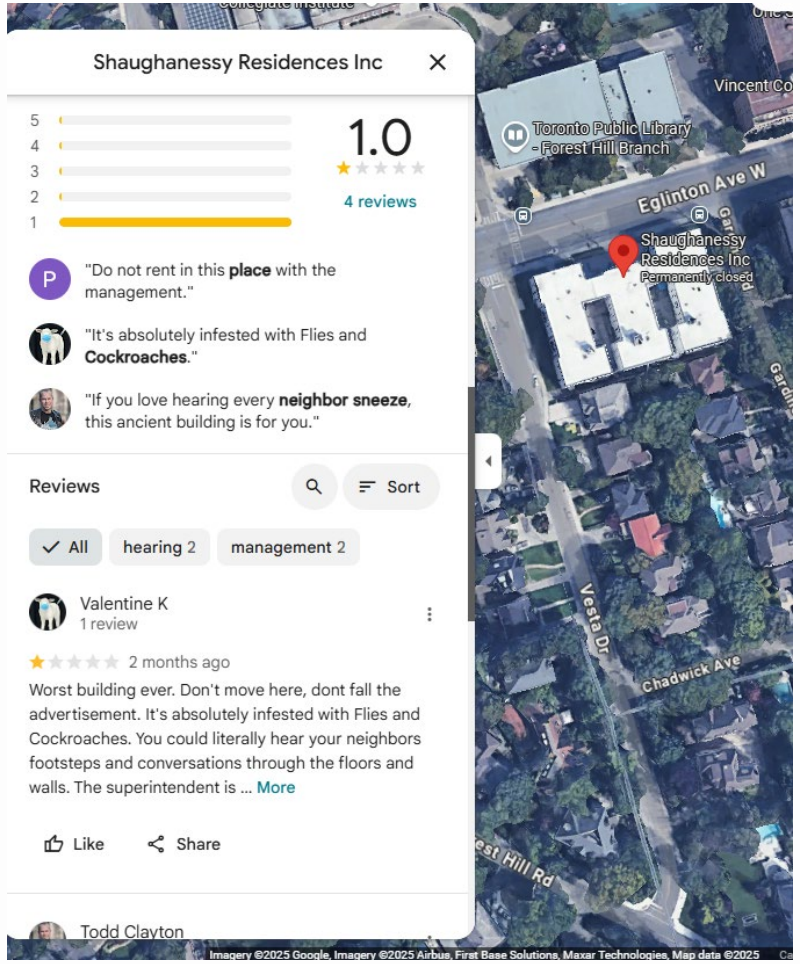
What is a 6-digit postal code?

- 2 buildings separated by 5 feet
- 523 Vesta Drive, M5P 3A9
- 697 Eglinton Ave West, M5N 1C6
- Same “Census Neighbourhood” (Dissemination Area)
- Different postal codes, very different people/clients



What is a 6-digit postal code? Part 2

- 697 Eglinton Ave West, M5N 1C6 (Shaughanessy Residences*)
- Different postal codes, very different people/donors/constituents

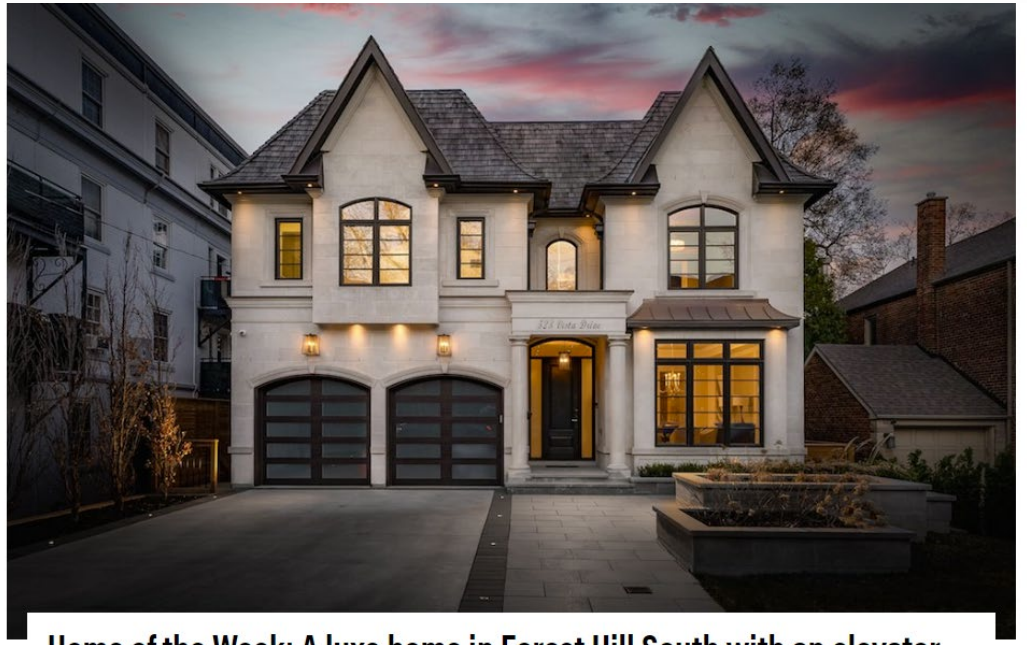


*aka 701 Eglinton Ave West on internet forums

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What is a 6-digit postal code? Part 3

- 523 Vesta Drive, M5P 3A9, listed for $5.988 million in 2021
- Different postal codes, very different people/ donors/constituents



Home of the Week: A luxe home in Forest Hill South with an elevator for $5.988 million

by Chelsea Dolan for Streets Of Toronto | Posted: April 6, 2021 | Photo: Stallone Media (All photos)

There's plenty of room to roam inside this chic home at 523 Vesta Dr. It spans more than 5,000 square feet of living space across three levels. Aside from its four bedrooms and seven bathrooms, the future owners can enjoy some nice amenities.

The home features an elevator, home theatre and wine cellar. The Forest Hill South abode is also a short drive away from everything at Yonge and Eglinton. It's listed for a fitting $5.988 million.

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What happened next?

- Both foundations know that 90% of their donations come from 0.1% of constituents
- Large Foundation
  - Used our data to narrow down from 15,000 new names per year + filter existing list of 500K to ~200 names per researcher per year
  - Data analysis team created donor profiles, custom in-house models, etc.
- Small Foundation
  - Used our data to zoom in on 25 constituents to steward/foster relationships with

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What happened next?

- Large Foundation
  - Prospect researchers had a more manageable, targeted list for deep-diving
  - Narrowed down from 15,000 new per year + existing backlog to ~200 per researcher per year
- Small Foundation
  - 2 years pre-campaign, invited each of the 25 constituents to lunch with a senior administrator, just to get to know them. No ask. No campaign details. Just relationship stewarding
  - After lunch with 4th constituent, they wrote a $25,000 unrestricted check unprompted

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Small Foundation: Benefits of using Manifold's Services

- Easy way to start/test value of prospect research.
  - Now hired a full-time prospect researcher
- Built pipeline of annual giving to major gifts and data-backed gift chart
- Identified key constituents to steward for next campaign.
- Asks now driven by systematic data
- A dedicated and knowledgeable team that has worked in the not-for-profit space for decades.



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Large Foundation: Benefits of using Manifold's Services

- 10% increase in received donations for test group vs. benchmark over 6 months
- Campaign planning: planning for # of donors at each giving level
- Automated method to transition constituents from Annual Giving levels to Mid-Level to Major Gift Prospects.
- Automated identification of potential Major Gift prospects.
- Prioritize prospects for the 10-person research team to research.
- Prioritize prospects for the philanthropy team. For example, level 5 prospects are a manageable number for a team of 20 to handle.

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Let’s start with a little **game.**

You should all have a scratch card.



Everyone won!

Yes. Everyone is a winner.



Now imagine...

Tomorrow morning,
you win $50 million.




Could your team
do it as well as you?

Could they answer?

- Who are our most important prospects?
- Who knows whom?
- What happened in that conversation?
- What matters to that donor?
- What should happen next?



Or would they say...

“It’s in the CRM somewhere...”

Those six words that can make a fundraiser’s heart rate go up.




Success isn’t simply
having a database.
Success is having a database
that takes complexity away.

A 360-degree view of a donor.

- Giving history and pledges
- Family, relationships and affiliations
- Interests and engagement
- Conversations
- Capacity and propensity




Not a 360-degree view.
An escape room!
?
?
?
?

Data quality starts **before the record.**

- Do we already have this person?
- Is this a duplicate?
- Same email? Same household?
- Existing relationship?



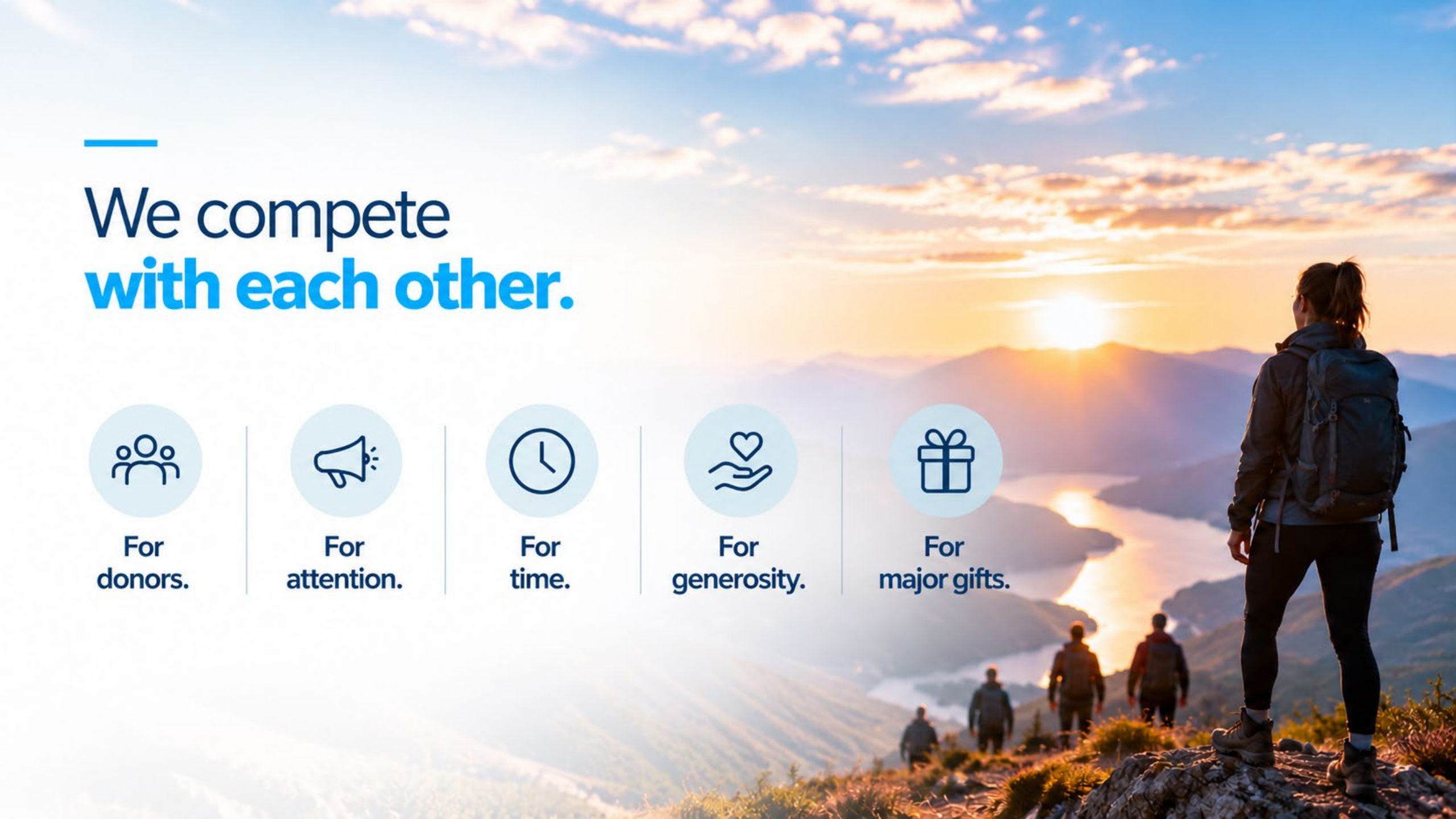
Sales were down 20%.
People are drinking less.
Case closed?




Because somewhere inside
that 20%... there may be a gem.


Finding that gem can change
your focus. And your impact.

We compete **with each other.**



For donors.

For attention.

For time.

For generosity.

For major gifts.


You are
the key element.


Better Data.
Better Decisions.
Greater Impact.


And maybe that's
the real prize.

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Thank you!

Charity CAN

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ANALYTICS