

factory
knowledge for good

Find the Funds, intelligently

Christopher Carnie

www.factory.com

factory
knowledge for good

Factory

- Founded 1990
- Strategic funders and nonprofits
 - Philanthropists, foundations, companies
- Services
 - Consultancy
 - Strategies for development
 - Research
 - Prospect research
 - Feasibility and market research
 - Coaching, training

www.factory.com

factory
knowledge for good


Find the Funds, intelligently

- Really Important Information
- To Google, or not
- A Strategic Focus for research
- Sources
- Managing Research
 - Who does what, when?

www.factory.com


factory
knowledge for good

Really Important Information

www.factory.com 

From Day One!

Really Important Information

www.factory.com 

Prospect Research

- ✓ Identify and evaluate, using ethical best practice,
 - ✓ Fundraising markets
 - ✓ Potential donors
- ✓ Transmit this information effectively to colleagues
- ✓ Build individual development strategies based on research
- ✓ Track, and sometimes manage, the movement of prospects in the Prospect Pipeline
- ✓ Manage the collection, storage and use of knowledge

www.factory.com 

Prospecting Ethics

- Intrusion
- Need to Know
- Data Protection
- Copyright
- Codes of Conduct

– www.aprahome.org

www.factory.com factory
powered by you

Gift Table

Gift	Donors	Total	Conversion Ratio	Prospects	Suspects
£4,000,000	1	£4,000,000	5	5	15
£1,000,000	3	£3,000,000	5	15	45
£200,000	5	£1,000,000	5	25	75
£100,000	10	£1,000,000	5	50	150
£50,000	20	£1,000,000	5	100	300
Totals		£10,000,000		195	585

www.factory.com factory
powered by you

The Prospect Pool

The Big Objective (normally)

Name	Address	Biography	Assets	Motivation	Connection	Gift Potential
Dr Beige	94, High Street	Medical Doctor				
Dave Brown	12 Mendip Ave,	Shareholder in...				
Jane Green	46, London Road	Architect				
Violet Purple	7b Lincoln Street	Author				

www.factory.com factory
powered by you

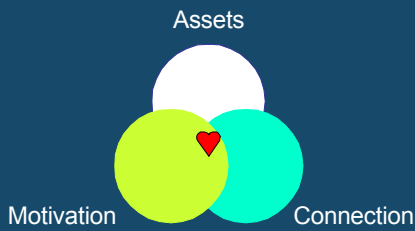
Hypothesis

- Developed from Strategy
- Characteristics
 - Biographic
 - Geographic
 - Philanthropic
 - Historic
 - Social
- Forms the Brief

www.factory.com

factory
powered by you

Research Focus



www.factory.com

factory
powered by you

Discussion

*Example information for
Assets
Motivations
Connections*

www.factory.com

factory
powered by you

Avoid This:

- Irrelevant
 - Is it really going to help you raise funds?
- Uncorroborated
 - “I saw this on Twitter...”
- Illegal
 - “Sensitive personal data”, DPA 1998 Pt1
 - Ethnicity, politics, religion, trades union, health, sexuality, criminality

www.factory.com **factory**

Understanding Motivations

Really Important Information

www.factory.com **factory**

Research Focus

Assets


Motivation

Connection

www.factory.com **factory**

Research Focus

Motivation




Hard to define
Hard to research
Powerful in fundraising

www.factory.com factory
powered by you



www.factory.com factory
powered by you



“There are a variety of reasons that motivate me to work here at the RSPCA. I have a particular interest in dogs, I thoroughly enjoy interacting with staff and public and the tasks I undertake are varied to my usual job.

“I decided to volunteer at the RSPCA as I owned a shop and I found I wanted a break from the monotony.

“The most rewarding experience for me is hearing the success stories of an adoptee. There is such a feeling of self satisfaction knowing that the dog has settled in well and the new owners are happy with their choice.”

www.factory.com factory
powered by you

Volunteer Motivation



Source: The Octagon Model of Volunteer Motivation
A B Young, Voluntas 15, 1, 2004

www.factory.com

factory
powered by you

Who said this?

- [Susie and I] were totally in sync about what to do with wealth - and that was to **give it back to society**.
- We agreed with Andrew Carnegie, who said that huge fortunes that flow in large part from society **should** in large part be returned to society.

Fortune magazine, June 25 2006

www.factory.com

factory
powered by you

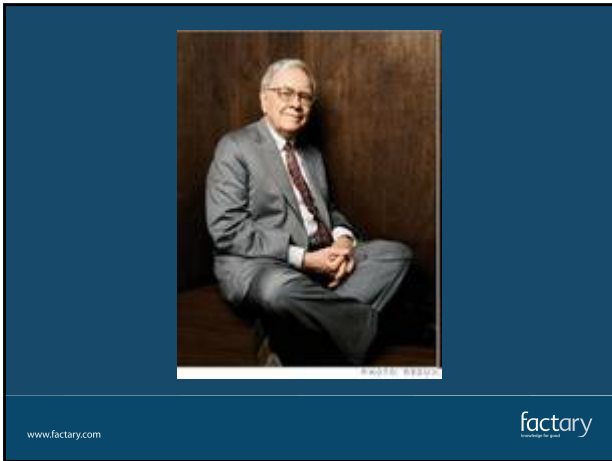
...and this?

“Over the years I had gotten to know Bill and Melinda well, spent a lot of time with them having fun and, way beyond that, had **grown to admire** what they were doing with their foundation. I'm always amazed at the enthusiasm and passion and energy they're pouring into their work. They've gone at it, you might say, with both **head and heart**.”

Fortune magazine, June 25 2006

www.factory.com

factory
powered by you







Find me 10 prospects who...

- Are interested in medical research
- Understand science
- Care about breast cancer
- Care about our university

...would support our breast cancer laboratory project

Prospect Hypothesis

www.factory.com factory

To Google, or Not?

www.factory.com factory

Google or Not?

Search Engine Use April 2009


Search Engine	Searches (millions)
Google	5510
Yahoo!	1406
MSN/Windows Live	853
AOL	321
Ask.com	182
My Web	59

Searches, millions. Source: Nielsen Online

www.factory.com factory

Google or Not?


- Search Engine Watch
 - www.searchenginewatch.com
- The Extreme Searcher's Internet Handbook
 - www.extremesearcher.com


www.factory.com 

Google, or Bookle?

- Google
 - Vertical search
 - Follow a track
- Bookle
 - Books, newspapers
 - Horizontal search
 - Get off the tracks
 - Find new stuff


Which newspaper do you read each day?



www.factory.com 

Google, or People?

- People
 - Interviews
 - The Duchess' friend at a big NGO
 - INSEAD's coffee breaks
 - Chatting in the Museum
 - Peer Review
 - Rioja and Rating

www.factory.com 

Discussion

*What's your in-house research programme?
Who are you talking to?*

www.factory.com **factory**

A Strategic Focus for Research

www.factory.com **factory**

Target Audiences

- Trusts and Foundations
- Individual Donors
- Corporations


www.factory.com **factory**

It's an inter-linked market

- Foundation
 - Linked via a board member to...
- Company
 - Linked via a shareholder to...
 - » Major donor


www.factory.com 

Emilio Botín



- Shareholder, Banco Santander
- President, Santander
- Fundación Marcelino Botín
 - www.fundacionmbotin.org
 - €33m budget for education, innovation, tech transfer, rural development

Holistic Research

www.factory.com 

Strategic Funders

- We call this inter-linked market segment

“Strategic Funders”

www.factory.com 

Discussion

Have you linked your trust and foundation grants – including research grants – to your major donor programme?

www.factory.com **factory**
powered by you

Top Sources

www.factory.com **factory**
powered by you

Discussion

- 1. Draw a Prospect*
- 2. Who does she know?*
- 3. Where could you find out about her?*

www.factory.com **factory**
powered by you

Find the Rich

- Factiva
- Lexis Nexis
- BoardEx
- Bureau van Dijk (www.bvdep.com)
 - Amadeus
 - DASH
- OneSource

www.factory.com

factory

Find the Rich

- Who's Who
 - UK x 2
 - France
 - Germany
 - Spain
 - Italy
- <http://www.whoswho-sutter.com/>

www.factory.com

factory

Find the Rich

Challenge.fr
L'économie en temps réel
Business

Les 50 patrons français les mieux payés touchent 3,8 millions

Cette somme représente 318 années de Smic. Avec 12 millions d'euros par an, l'ancien PDG de Renault Lucien Schwab est le plus riche.

Les salaires des patrons français ont connu un progrès en 2008, avec les 50 mieux payés touchant un montant moyen de 3,8 millions d'euros, soit l'équivalent de 318 années de Smic.

C'est un bon record du côté de l'industrie française. Les patrons allemands et japonais ont touché en moyenne 4,2 millions d'euros, soit 350 années de Smic. En comparaison, le salaire moyen d'un ouvrier français est de 12,2% de ce montant.

Les 50 patrons français les mieux payés ont touché en moyenne 3,8 millions d'euros, soit 318 années de Smic. Le salaire moyen d'un ouvrier français est de 12,2% de ce montant.

Lire aussi

- Les salaires des patrons français ont connu un progrès en 2008
- Les salaires des patrons français ont connu un progrès en 2008
- Les salaires des patrons français ont connu un progrès en 2008

www.factory.com

factory

www.bilanz.ch
www.challenges.fr
www.manager-magazin.de/

The image shows two screenshots from financial websites. The left one is from 'bilanz.ch' showing a magazine cover. The right one is from 'challenges.fr' showing a list of 'LES PLUS GRANDES FORTUNES' with Michel Reybier at the top, including a small line graph showing his wealth progression from 2003 to 2008.

www.factory.com factory

Company Sources

- Stock Exchanges
 - www.euronext.com
- Government Registers
 - www.zefix.ch
- Compilers
 - www.societe.com
- Sponsorship
 - www.admical.org

www.factory.com factory

Finding Foundations

- Directories
- Registers
- Competition
- Company Directories
- Who's Who

www.factory.com factory

Where to go for information: Europe

- European Foundation Centre
 - www.efc.be
- Foundation Associations
 - www.fundaciones.org
 - www.swissfoundations.ch
 - www.centre-francais-fondations.org/
 - www.verenigingvanfondsen.nl/

www.factory.com

factory

Where to go for information: Europe

- Foundation Registers
 - Normally the same as company registers
 - www.zefix.ch
 - www.just.fgov.be/index_fr.htm
 - ...but include voluntary registers
 - <http://www.fondazioni.it/>
- Special Interest Associations
 - www.evpa.eu.com
 - www.acri.it
 - Italian banking foundations association

www.factory.com

factory

Where to go for information: USA

- www.foundationcenter.org
 - *Guide to U.S. Foundations, Their Trustees, Officers, and Donors*
 - FC Search
 - Foundation Directory
- www.guidestar.org
- Foundation's website
- Chronicle of Philanthropy
 - www.philanthropy.com

www.factory.com

factory

Managing Research
Who Does What?

www.factory.com

factory
powered by you

The Prospect Pipeline

www.factory.com

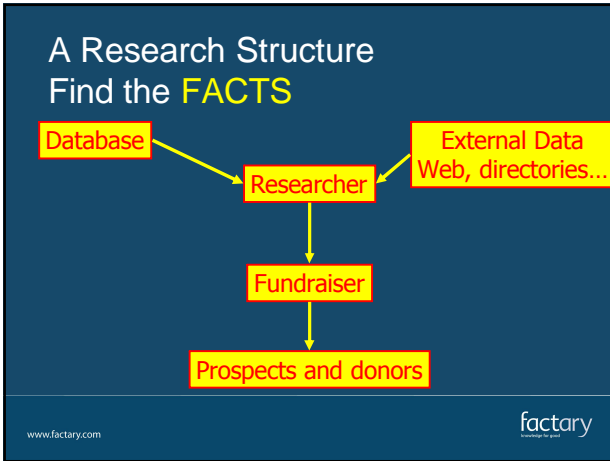
factory
powered by you

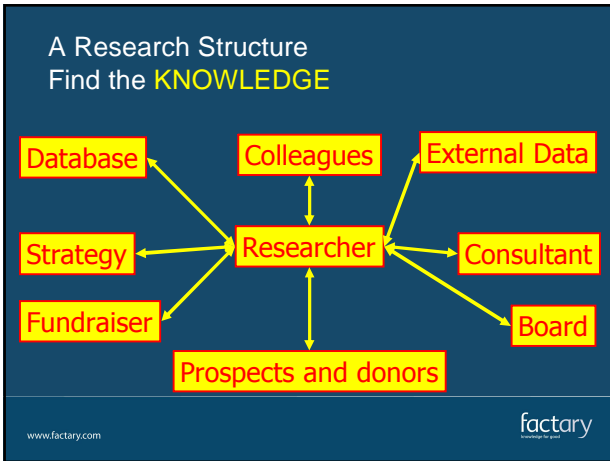
Discussion

Which research, when?

www.factory.com

factory
powered by you






Discussion

*Are you really **MANAGING** the knowledge?*

www.factory.com factory

Example Research Metrics

- New prospect acquisitions
- Numbers at each Pipeline stage
- % increase in upgrade rate after research
- £ increase in donations after research
- £ decrease in
 - Cost per acquisition
 - Cost per upgrade

www.factory.com 


Find the Funds, intelligently

- ✓ Really Important Information
- ✓ To Google, or not
- ✓ A Strategic Focus for research
- ✓ Sources
- ✓ Managing Research
 - Who does what, when?

www.factory.com 

Your Action Plan

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

www.factory.com 

Thank you!

Chris Carnie
chris@factory.com

www.factory.com

factory
