

## FOREWORD

////////////////////

### **“Can Con”**

My first brush with prospect research occurred 15 years ago. I was fresh out of university, having earned a liberal arts degree, and therefore, qualified to do very little in the workplace. A job posting for a research assistant at Simon Fraser University (SFU) Advancement managed to meander my way. Searching for information about successful people using a bevy of mainstream media, among other resources, appealed to this recently retired term paper writer. I was hooked.

My first real job had me learning about someone or something new each day, harnessing my insatiable curiosity. My manager Erin was a wealth of knowledge. She helped me unearth a slew of resources that a researcher can access about local and national funding opportunities, in addition to clearly explaining the difference between an in-kind gift and an outright donation. Since then, numerous intelligent, experienced and supportive colleagues like Erin have provided patient guidance on my career journey.

Piecing together resources, techniques, guiding principles and stories, shaped my knowledge of prospect research and fundraising. This somewhat scattered approach has led others to define prospect research in Canada. Frontline fundraising colleagues have assessed its effectiveness. American counterparts have guided best practices. Now, this book allows Canadian contributors to finally define prospect research in our own way, on our own confident terms.

Here’s a chance for you, dear reader, to learn techniques and guidelines based on the real world experiences of active, expert practitioners. To set the scene, the editors have given me an opportunity to define what prospect research means: three terms come to mind - preparation, perspective and community.

*Prospect research is about preparation.*

It’s about knowing who to approach, in what way, when and for how much, throughout the various stages of the fundraising cycle. This could mean the difference between securing \$10,000 or \$100,000 from a donor. Through prospect research, you could find the “hook” to approach and bring someone new closer to your organization.

Soliciting a donor for support of a cause she doesn’t care about or isn’t known to already support feels like a waste of that donor’s (and the organization’s) time. Trying to find a meaningful fit, before approaching, is what a prospect researcher prepares a fundraiser to do.

*Prospect research is about perspective.*

While we strive for accuracy, we’re limited by resources that are only publicly available (and the Timbits in our respective databases). Request a prospect profile about entrepreneur Heather Reisman from two

researchers and you'll receive two very different versions about her as a philanthropic individual.

Perhaps divergent perspectives account for why prospect research can elicit feelings of discomfort, even negativity. This sentiment continues to concern me. Using findings with great care and tact makes prospect research the most powerful in a fundraiser's cadre of strategies. Practicing this craft has consequentially grown my own generosity and made me a savvier donor.

From a comparative perspective: market research drives consumerism. Business development grows corporate enterprise. Prospect research fosters transformational philanthropy.

Prospect research in Canada is about community.

At first glance, the work of a prospect researcher may seem solitary in nature and scope, but there are dedicated professionals across Canada who connect this generous community. You will find them answering a question about wealth screening on a listserv, volunteering for a position on the APRA Canada board, or mentoring a colleague who is new to the field.

In the same way the CRTC attempts to meet the needs and interests of Canadians by providing home-grown programming on radio and television, this book attempts something similar, to reflect Canadian attitudes, opinions, ideas and values. As Liz Rejman describes it, "A prospect research resource specific to Canadian research, written by Canadians, was missing. I know some really smart researchers whose knowledge should be shared beyond a conference session or article in [APRA Canada's] *The Scoop*." "Life, liberty and the pursuit of happiness" may motivate donors south of the 49th Parallel, but an experienced researcher assesses donors and prospects closer to home through the tempered lens of "peace, order and good government."

My heartfelt thank-you goes to all the contributors to this important work, for sharing their expertise to create a timely body of content. The contributors demonstrate how prospect research can be a social activity, best practiced in collaboration with others. When you work with other prospect researchers, you will better understand the craft.

Long live prospect research in Canada.

**MS. PREETI GILL**

Manager, Prospect Development  
St. Paul's Foundation in Vancouver, British Columbia

## PREFACE

////////////////////

As the Canadian Chapter of the Association of Professional Researchers for Advancement (APRA Canada) celebrates its 15th Anniversary since its first official by-laws were enacted (March 3, 2001), it was time to recognize that the research we do in Canada for our fundraising organizations is very different than that found in the currently available resources from the United States. While we continue to learn from our research partners in the US, (since they have been doing this far longer than we have) the vast differences in the privacy laws and availability of resources, made it obvious that we, as Canadian researchers, needed our own resource. Luckily, we have a great network of researchers across Canada who, when asked, were more than willing to contribute to this valuable tool.

Despite the great many areas this book covers, we are aware that many of its components still have room for more complex content in their own right. Deciding what level of content was needed for our first publication required a careful balance, and much discussion, after which we are very happy with the result. This book is intended for fundraisers and researchers just starting out with prospect research; those wishing to establish training and guidelines for their organization or educational programs; or those from other sectors or countries who realize the unique skill sets required to successfully conduct research in Canada. Regardless of the intentions, we believe the readers will find information which will better help them understand why we, as Canadian researchers, are not only specialists in our field, but also passionate about our ethics and standards and continually improving this profession that we love.

**TRACEY CHURCH & LIZ REJMAN**

Editors