## Introduction to Prospect Research in Nonprofit Organizations
Section 0110

Instructor: Jennifer Zhang
Classes: Thursdays from 6:30-9:30pm
Classroom: BL 325

### CONTACT AND COMMUNICATION

- Email: jzzhang@rogers.com
- Please include "iSchool Prospect Research Workshop" in the subject line
- Please allow 24 hours for response
- I will try to be in the classroom at 6pm to answer questions
- Other discussion times will be arranged by appointment

### WORKSHOP DESCRIPTION

Did you know that Canada's nonprofit and voluntary sector is the 2nd largest in the world and that two million people are employed by these organizations? This represents 11.1% of the economically active population.

As information professionals, your research, data mining, analysis and information management skills are in high demand in the nonprofit sector.

This workshop will provide you with hands-on training and practice in all aspects of prospect research. Topics will include key elements in prospect research, biographical research, wealth indicators, prospect identification and prospect pipeline management.

If you are interested in pursuing a career in prospect research, this workshop will well prepare you, wherever that career takes you -- universities, colleges, private schools, hospitals/healthcare or arts and community organizations.

### WORKSHOP LEARNING OUTCOMES & RELATIONSHIP WITH PROGRAM OUTCOMES

At the end of the workshop, students will:

- be well prepared for a prospect researcher's position at a nonprofit organization;
- have an understanding of what prospect research is and how it supports major gift fundraising;
- learn how to use online resources to effectively conduct prospective donor research;
- discover various wealth indicators and estimate giving capacity;
- explore creative strategies to identify prospective major gift donors; and
- understand the importance and different ways of managing a prospective donor pipeline

## WORKSHOP OVERVIEW

Please note the last day to drop this workshop:
INF 2005H: January 23, 2017
INF 2006H: March 13, 2017

| Week | 1005H Date | 1006H Date | Topic and Note |
|---|---|---|---|
| 1 | Jan 12 | Mar 2 | Workshop overview, expectations, assignments and grading<br>Introduction to major gift fundraising and prospect research<br>*1$^{st}$ assignment distributed and explained* |
| 2 | Jan 19 | Mar 9 | Individual research<br>Wealth indicators<br>*Most important class of the workshop* |
| 3 | Jan 26 | Mar 16 | More on wealth<br>Estimating gift capacity and other ratings<br>*In-class group assignment #1* |
| 4 | Feb 2 | Mar 23 | Corporate and foundation research<br>Media Review<br>*2$^{nd}$ assignment distributed and explained* |
| 5 | Feb 9 | Mar 30 | Prospective donor identification<br>Raiser's Edge demo<br>*In-class group assignment #2* |
| 6 | Feb 16 | Apr 6 | Prospect management, ethics and job searching<br>*In-class group assignment #3* |

## EVALUATION

| Category | Description | Due Date | Weight |
|---|---|---|---|
| In-Class Group Assignment #1 | Ratings | Jan 26 | 10% |
| 1$^{st}$ Assignment | Individual Profile | Jan 29 | 40% |
| In-Class Group Assignment #2 | Prospect Identification | Feb 9 | 10% |
| 2$^{nd}$ Assignment | Corporate or Foundation Profile | Feb 10 | 20% |
| In-Class Group Assignment #3 | Prospect Recommendation | Feb 16 | 10% |
| Participation | Attendance and Participation | Ongoing | 10% |

## GRADING, EXTENSIONS, AND LATE ASSIGNMENTS

Grading:
- Please consult the iSchool's Grade Interpretation Guidelines and the University Assessment and Grading Practices Policy. These documents will form the basis for grading in the workshop.
- Letter grades will be used. The above sources define grades in the A range as "excellent" and grades in the B range as "good."
- The following grading scale is used:

| | | | | | | |
|---|---|---|---|---|---|---|
| **A+** | 90 - 100% | **B+** | 77 - 79% | **FZ** | 0 - 69% |
| **A** | 85 - 89% | **B** | 73 - 76% | | |
| **A**- | 80 - 84% | **B**- | 70 - 72% | | |

Extensions:
- Extensions are granted only in cases of a medical condition or emergency.
- Instructor needs to be informed at least 12 hours before the assignment is due.
- No extensions will be granted under any circumstances after the due date of the assignment!

Late assignments:
- If no extension has been granted the late submission of an assignment carries a penalty of one grade point (e.g., from A to A-) for each week to a maximum of two weeks; thereafter any passing assignment receives a B- grade.

Missed In-Class Group Assignment:
- If you miss an in-class assignment for illness or compassionate reasons (death or serious illness in family, etc.), you are required to contact your instructor with appropriate documentation at the earliest reasonable time. A make-up time will be scheduled.
- In-class assignments that are missed without following these procedures will be counted as 0.

## READING MATERIALS

Books:
- Prospect Research in Canada: an essential guide for researchers and fundraisers, by Tracey Church and Liz Rejman
- Prospect Research: A Primer for Growing Nonprofits, by Cecilia Hogan
- Excellence in Fundraising in Canada, edited by Guy Mallabone

## ACADEMIC INTEGRITY

Please consult the University's site on Academic Integrity. The iSchool has a zero-tolerance policy on plagiarism as defined in section B.I.1.(d) of the University's Code of Behaviour on Academic Matters. You should acquaint yourself with the Code. Please review the material in Cite it Right and if you require further clarification, consult the site How Not to Plagiarize.

## STUDENTS REQUIRING ACCOMODATION

Students with diverse learning styles and needs are welcome in this workshop. If you have a disability or a health consideration that may require accommodations, please feel free to approach me and/or the Accessibility Services Office as soon as possible. The Accessibility Services staff are available by appointment to assess needs, provide referrals and arrange appropriate accommodations. The sooner you let them and I know your needs, the quicker we can assist you in achieving your learning goals in this workshop.