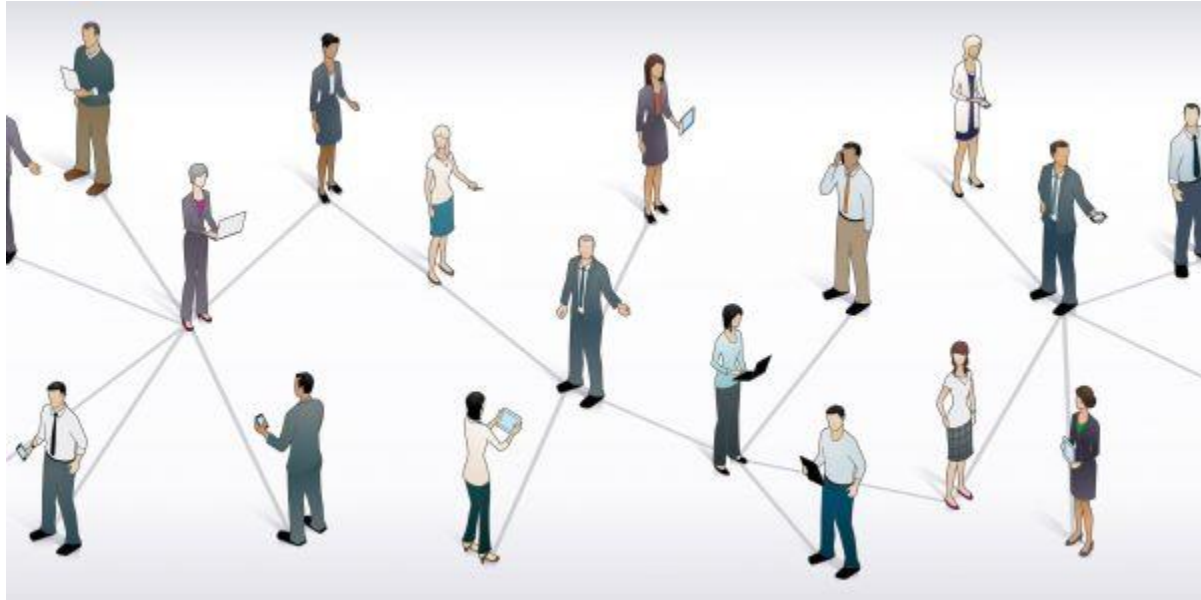


Nonprofits Find New Donors With Databases That Track Connections



By Nicole Wallace

The Henry Ford, a history museum and complex in Dearborn, Mich., had its eye on a company as a potential sponsor for its education program, but none of the nonprofit's executives knew anyone there to start the conversation.

Enter the nonprofit's relationship-mapping database. The group's chief fundraiser looked up the company in the system his group subscribes to and saw that one of the charity's trustees had a former colleague who now worked at the company. The trustee made an introduction, and now, a year later, the business has made a six-figure commitment to the Henry Ford.

Being able to map the connections between the museum and the company was crucial in securing the gift, says Spencer Medford, vice president for institutional advancement.

"That's not to say that we couldn't have found another way," he says. "But it was a way of speeding up the process of getting to a decision maker."

Marine Biological Laboratory

The Marine Biological Laboratory became an affiliate of the University of Chicago in 2013. The university's donor researchers came up with a list of donors who support ocean science and,

using a relationship database, identified existing supporters who had links to those people. That research has led to meetings with potential donors, which fundraisers hope will result in gifts.

Relationship mapping isn't a new idea. Fundraisers have always cared about who knows whom and have tried to trace the connections of their board members and major donors. But new technology is helping them formalize those efforts and uncover hidden connections between the charity's network and prospective donors.

"The motto around our office is 'No meetings, no money,'" says Andrew Bernstein, director of major gifts at the YMCA of Greater New York. "This really helps us get in the door."

Harnessing Memory

Relationship databases that combine publicly available data on things like board membership, employment, and education to map potential links among people are making the biggest splash. But the services aren't cheap. Annual subscriptions to two of the leading services, Prospect Visual and Relationship Science, start at \$3,950 and \$6,000, respectively.

Some charities are taking the [do-it-yourself route](#), using software programs like Muckety and NodeXL to visualize the links they uncover in their own research. Fundraising-software companies are also beefing up their products' ability to store and track relationships.

Standardizing an organization's approach to relationship mapping is a way to harness institutional knowledge for fundraising, says Megan Heister, director of research and prospect management at Planned Parenthood Federation of America.

"It allows you to rely less on the memories of just a couple people who work on your staff," she says, "so that the information is visible to everyone."

But even fundraisers who are excited by the potential of relationship mapping to boost giving say organizations need to exercise good judgment in how they use the information they uncover.

Jim Beikler, assistant manager of prospect research at Colorado State University, says he has seen firsthand what a powerful tool relationship mapping can be. Fundraisers at the university used information gleaned from a relationship database to land a meeting with a graduate on the *Forbes* list of wealthiest Americans. The relationship is in its early stages, but the university hopes it will lead to a gift.

Still, he says, it's important to remember that some people might be taken aback by the amount of information available on them: "It could be perceived as very icky."

Mr. Beikler says development staff need to be open with donors and volunteers about where they got the information and explain how conducting research helps the group raise money to carry out its mission.

A Starting Point

Fundraisers also need to look at the information in relationship databases as a starting point rather than ironclad proof of a link, says Catherine Cefalu, lead prospect-research analyst at the University of Chicago. Sometimes the data can have errors. But even if it's accurate, she says, organizations can't make assumptions based on the fact that two people served on a board together.

Says Ms. Cefalu: "There's really no way of knowing whether or not they actually know each other, whether they're best friends, whether they're enemies."

The university is using relationship mapping to lay a foundation for fundraising in a new area.

Early last year, the University of Chicago and the Marine Biological Laboratory in Woods Hole, Mass., formed [an affiliation](#). When fundraisers at the university conducted research on who supports ocean science, they came up with a list of very wealthy people, says Ms. Cefalu: "Having these stars to shoot for was a little bit daunting."

But by looking up those people in a relationship database, fundraisers were able to find paths between the wealthy philanthropists and people who were already strong supporters of the university. As they worked those connections, fundraisers have been able to set up meetings and start to get to know the prospective donors.

Says Ms. Cefalu: "Relationship mapping helped so much in this because we were starting from scratch."

Speeding Up

While some charities begin by thinking of a dream donor and working backward to find a connection, others start with their existing supporters and cast their nets outward.

The University of Washington recently mapped the networks of board members and major donors who are willing to help the institution identify other potential supporters.

It's a proactive way for fundraisers to accomplish one of their toughest tasks, finding "people who can make very, very large gifts who are not already close to us," says Jennifer MacCormack, associate director for advancement analytics.

"Often these relationships are very hard to find and research," she says. "A lot of the time you find them because you're having the conversations with your donors already, and they're making these introductions."

Right now gift officers are working with university supporters to identify the most likely potential donors in their networks. Ms. MacCormack says the university should start to see if the effort is successful in the next year to 18 months.

The World Wildlife Fund is using relationship mapping to put a new twist on peer review. Instead of asking all board members to look at the same list of names to identify people they know and think would be likely to give, the organization is creating custom lists for each person.

The lists are a good tool for getting volunteers into the right mind-set, says Andrea Balzano, senior development research analyst.

"They don't necessarily find a lot of people they'd be willing to invite to dinner," she says. "But the lists really help speed up the process and get them thinking about who they might know."

The approach is new, so the organization is still waiting to see if it will be successful.

"It is a numbers game," says Ms. Balzano. "I think it's going to take a lot of peer-review sessions to come up with a handful of good names."

Questionnaires

Relationship databases can be a useful fundraising tool, but getting information directly from board members and other volunteers can be invaluable in helping fundraisers navigate the torrent of data they provide, says Mark DeFilippis, director of prospect development at the Nature Conservancy.

The environmental group routinely uses relationship databases, but it still asks board members and other fundraising volunteers to fill out questionnaires about their professional background and past board service.

Says Mr. DeFilippis: "If the volunteer can tell me from the outset that these are the three or four boards or organizations where they feel engaged and have some reach, then that helps me not worry about the other 50 organizations they might be affiliated with."

Travel is a big part of many fundraisers' jobs, and relationship mapping can help them make the most of their time out of the office.

Recently executives at the YMCA of the USA traveled to meet with a foundation in California. By searching for companies and other foundations within a 50-mile radius and tracing the Y's contacts to people within those institutions in a relationship database, the executives were able to set up several other meetings. "They said, 'Hey, we're going to be in the area. We'd love to meet with you,'" says Mary Ramirez, a consultant who conducts fundraising research for the organization. "It made the trip a lot more productive."

Fundraisers at Northwestern University do the same thing when they're visiting cities where the university hasn't identified a lot of potential donors.

Using a relationship database to ferret out potential donors and people in the university's orbit who can make introductions is especially helpful when gift officers travel internationally, says Jennifer Fry, director of prospect discovery and information.

"In a lot of cultures, that's more important than anything," she says.

Looking at the size and influence of supporters' personal networks also helps the university determine who might make good campaign volunteers, says Ms. Fry. "The potential volunteer might not be capable of a very large gift or be formally someone who's very influential," she says. "They might have a circle of really great connections, so they would serve as a great connector for us."

Unexpected Benefits

Nonprofits sometimes end up using relationship mapping for unexpected purposes.

Mr. Medford, at the Henry Ford, has used a relationship database to help the museum's curators find connections between the institution and collectors they're trying to contact.

Giving board members specific assignments, he says, like asking them to make introductions and help set up meetings for fundraisers and curators, has strengthened their ties to the Henry Ford.

Says Mr. Medford: "I have a highly engaged fund-development committee, and to me that is worth its weight in gold."

The Henry Ford: Multiple Uses for Relationship Mapping

Finding Introductions: Using a relationship database, fundraisers at The Henry Ford museum learned that a board member had a link to someone who had ties to a company they wanted to solicit. Officials got the necessary introductions and in time won a six-figure gift.

Connecting With Collectors: Museum officials also use the relationship database to help curators find connections between the institution and collectors they're trying to contact.

Engaging Board Members: Giving board members specific assignments, such as making introductions for fundraisers and curators, has helped strengthen their ties to the institution.