# PROSPECTING THE PROSPECTS

**IDENTIFYING NEW CORPORATE DONORS** 

WED MAY 4th 1 PM ET 12 PM CT 11 AM MT 10 AM PT

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## HOSTS



Kelly Velasquez-Hague VP, Marketing OneCause



Chris Hammond
CEO & Founder
Corporate Giving Connections
(CGC)



Brittany LaGanke
Vice President of
Project Management
Corporate Giving Connections
(CGC)



## Introduction

During this presentation we'll cover the following topics:

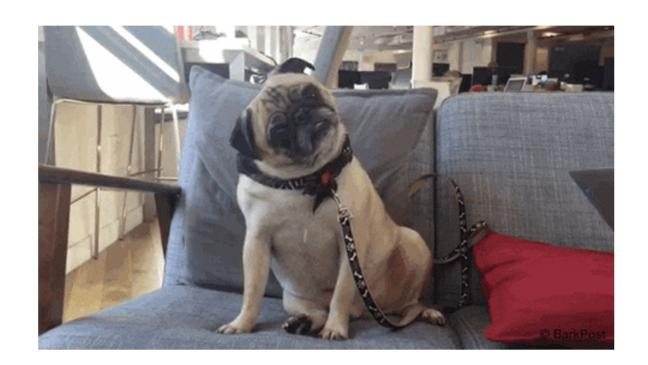
- 1) How to conduct a Market Analysis
- How to put together Corporate Prospect Research
- 3) Identifying your value propositions
- 4) Getting introductions





## **Question Time**

Does your organization have a team or staff member dedicated to corporate partnerships?







## How will a Market Analysis help your organization?

- Identify peers and competitors in your space.
- What types of fundraising are they doing? (events, grants, campaigns)?
- Who is funding them?
- How does your organization offer something different or unique from the rest?





## **Tools Needed for Market Analysis:**

- Google/other search engine
- Guidestar/Charity Navigator profile
- Bonus tool if possible: prospecting/wealth screening software: Wealth Engine, iWave, etc





## Our Market Analysis includes the following:

- Org Name
- Location
- Org Size
- Mission
- Corporate Donors
- Foundation Donors
- Events
- Annual Report
- Notes





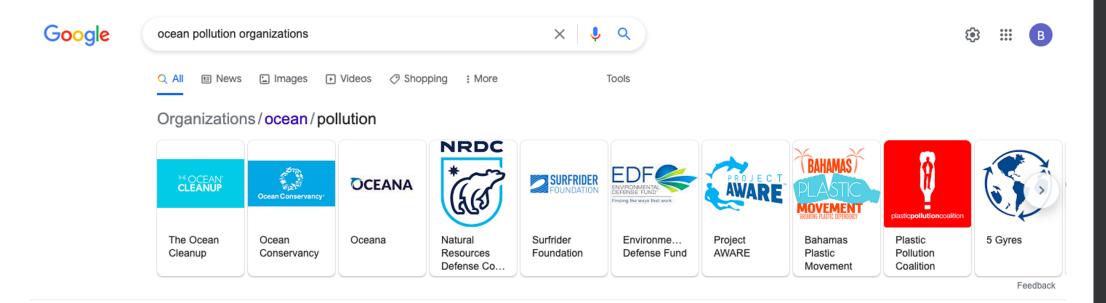
| Name                   | Location         | Website                   | Mission  | Size               | Events                           | Corporate/Foundation<br>Sponsors    | Annual Report Link      |
|------------------------|------------------|---------------------------|--|--------------------|----------------------------------|-------------------------------------|-------------------------|
|                        |                  |                           | Founded in 2009, The 5 Gyres Institute has taken on 19 research expeditions in all 5 subtropical gyres as well as many of the world's lakes and rivers in search of plastic.  EMPOWERING ACTION AGAINST THE GLOBAL HEALTH  |                    |                                  |                                     |                         |
| 5 Gyres                | Santa Monica, CA | https://www.5gyres.org/   | CRISIS OF PLASTIC POLLUTION THROUGH SCIENCE,<br>EDUCATION, AND ADVENTURE   | 2018: \$900k       | https://www.5gyres.org/trashbli  | https://www.5gyres.org/partners     | https://static1.squares |
| Californians Against V | Sacramento, CA   | https://www.cawrecycles.  | The mission of Californians Against Waste is to conserve resources, prevent pollution and protect California's environment through the development, promotion, and implementation of waste reduction and recycling policies and programs.  | 2018: \$490k       | https://www.cawrecycles.org/ne   | ws                                  |                         |
| Clear Blue Sea         | San Diego, CA    | https://www.clearbluesea  | Clear Blue Sea is a 501 (c)3 nonprofit located in San Diego, California. Our organization is staffed with over 100 volunteers, interns, and mentors. We are committed to innovating robotic solutions for removing plastic pollution from rivers, bays, and oceans.  | 2018: \$130k       |                                  | https://www.clearbluesea.org/dona   | ate/                    |
|                        |                  |                           | From policy change to educational programs, we're ensuring ocean conservation throughout the community. Our programs and projects are designed to support the foundations of a thriving Monterey Bay: clean shores, healthy habitats, and living waters. Watch this video to explore how these focal areas fit within our Vision 2025. |                    |                                  |                                     |                         |
| Save Our Shores        | Santa Cruz, CA   | https://saveourshores.org | Three pillars: Clean Shores, Healthy Habitats, Living Waters   | 2018: \$700k       | https://saveourshores.org/even   | N/A                                 |                         |
| Surfrider Foundation   | San Clemente, CA |                           | The Surfrider Foundation is dedicated to the protection and<br>enjoyment of the world's ocean, waves and beaches, for all<br>people, through a powerful activist network.  | 2018: ~\$9 million | https://www.surfrider.org/events | https://www.surfrider.org/partnersh | https://s3-us-west-2.ar |
|                        |                  |                           | Our first movie, The Story of Stuff, started it all, launching an honest conversation about our consumption-crazed culture. Since then, we've produced dozens more animated shorts and documentaries that chart a path to a more just and sustainable future.  |                    |                                  |                                     |                         |
|                        |                  |                           | Today, our San Francisco Bay Area-based team inspires and encourages the civic engagement of the more than one million   |                    |                                  |                                     |                         |



California 🕶

US -

International -



Ad · https://www.ehn.org/ocean-pollution :

#### Ocean pollution - The Ocean Plastics Crisis

Too much plastic is ending up in the **ocean** and making its way back onto our dinner plates. We love sharing top environmental health news. The most important news stories, for free.

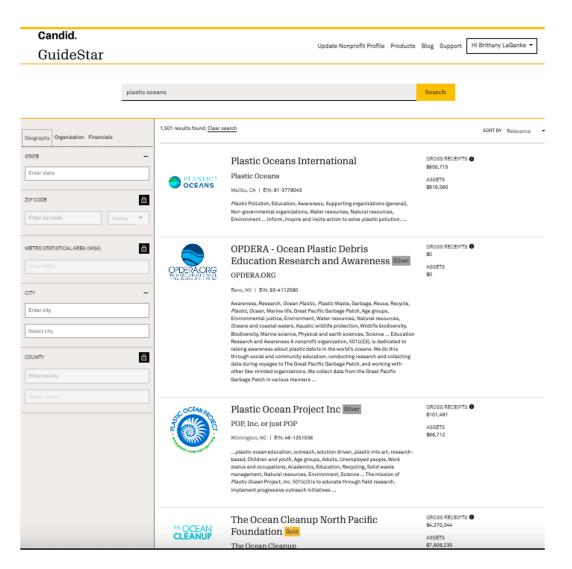
#### **Good News**

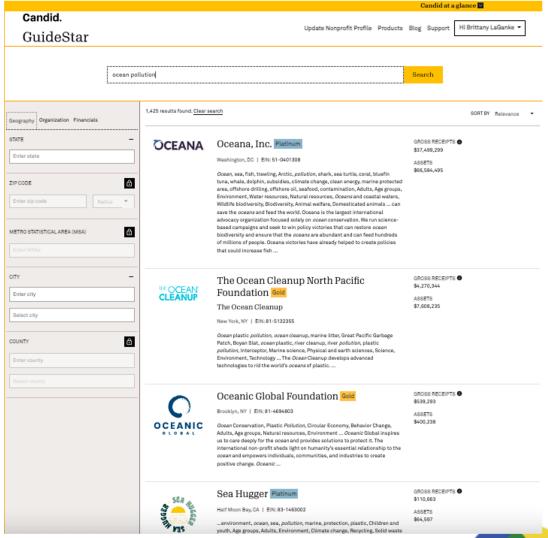
Positive stories impacting us all See the wins in the Environment

#### **COVID19** and Environment

Coronavirus and the environment. COVID's impact on Global Climate







CORPORATE

CONNECTION

## The Surfrider Foundation would like to thank th for their support, which enables us to protect and pre





























#### SURF INDUSTRY COASTAL DEFENDERS



























\$350,000+

The David and Lucile Packard Foundation

\$250,000-349,000 Everlane

\$150,000-249,999

Leonardo DiCaprio Foundation Resources Legacy Fund

\$100,000-149,999 Ananymous Foundation

The Battery Foundation

\$50,000-99,999

Don Q Rum Madewell

NOAA Marine Debris Program

REN Clean Skincare

The Estate of Robin

The Forest & Frances Lattner Foundation The Harder Foundation

The NobleLight Foundation The Offield Family

Foundation Windsong Trust

\$25,000-49,999

American Eagle Outfitter Accommous

Aveda Corporation Ball Corporation California State Parks Foundation

Catherine M. Stiefel and J. Keith Behner Charitable Fund Foundation, Inc.

Olf Bor & Company Horold K.L. Castle

Foundation Judith Posnikoff

KROQ Londa Blue Pacifico

Patagonia Paul M. Angell

Fornity Foundation Dater and Lites Pierce Fiedelholtz

Soott Dunn Ltd. The Durtis and Edith Munaon Foundation

The John A. and Elizabeth F. Taylor Charitable Foundation, Inc.

The Martin Foundation, Inc. Western Conservation

White Class Hard Seltzer Wright Montgomery Charitable Fund

\$10,000-24,999

Amle Stier and Matt Jarvis Anonymous Foundation Anenwmous Fund

Bedlach Family Foundation Billabong USA. Chesapeake Bay Trust Coronado Brewling Company

Craul Family Faundation Dakine Electric Visual Evolution

Harriet Zaretsky Horace W. Goldsmith Foundation

> Jason and Rhanda DeLand Jeffrey Berman

> > Jeserry Doggette Living Ocean Fund Kathleen and Kevin Fee

Kohl's National Giving Land & Sea Restaurants

Long Island Communiy

Marhieu Streiff Mellam Family Foundation

Michael Bulger Negroni Week Northwest Fund for the Environment

Pearlman Geller Family

Peter and Christine Naktenia Piedmont Trust Company

Reissa Foundation Roller Babbit.

Tara Hirabberg The Cambrell Foundation Blaustein Rosenberg Foundation

The Hoxberg Family The JEC Foundation The Lazar Foundation

Wass

Whittier Trust Company

Yachok

\$5,000-9,999

Airbeb Allen Gimenez

Alyssa Bergerson Amazonamile Foundation

Anne Templeter

Anonymous Bombora

**Bulland Foundation** Charles Fisher Chipotle Mexican Grill

Chris and Evelyn Adams

Christen C. & Ben H. Garrett Family Foundation Christopher Celtruda

Citizens for Kevin Ranker City of Miami Beach

Comucosia Natural Foods

David Levy Ginger and David Komar Quoci America, Inc.

Hiemstra Family Charitable Hotel Crafters Hollywood Jewish Community

Federation John Farrell John J Moller Family

John Sargent

SURFRIDER.ORG | 21



## **Question Time**

Has your organization ever conducted a Market Analysis?







# Corporate Prospect Research

# How will a Corporate Prospect Research help your organization?

- Identify which companies and foundations are already giving in your space.
- What types of partnerships do they already have?
- What types of partnerships might they be interested in?
- How does your organization offer something different or unique from the rest?





## **Tools Needed for Corporate Prospect Research:**

- Google/other search engine
- Guidestar/Charity Navigator profile
- LinkedIn profile
- Bonus tool if possible: prospecting/wealth screening software: Wealth Engine, iWave, etc





## Our Corporate Prospect Research includes the following:

- Company name
- Organizations supported
- Website
- Funding priorities
- Corporate Social Responsibility page
- Top prospects
- Value propositions (what separates you from your competitors)
- Contact information (if available)





## **Corporate Prospect Research**

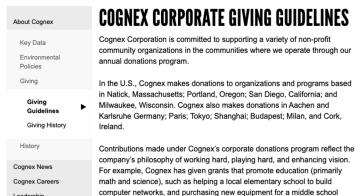
| Organization(s)<br>Supported:   | Website   | Funding Priorities/Notes   | CSR Page (If Available)  |
|---|---|--|--|
| Prevent Blindness America,<br>Guide Dog Foundation for<br>the Bind, Guide Dogs for<br>the Blind | https://additiontechnology.com/home   | Located in IL, We work closely with recognized ophthalmologists, universities and technological centers to develop and manufacture innovative products to support medical professionals to improve their patients vision worldwide. Veterinary products. Supported multiple vision loss organizations in 2020. No CSR page on site.  |  |
| Vail Veterans Foundation,<br>Special Olympics, Canine<br>Companions of the Rockies<br>(2011)    | https://www.alpinebank.com/   | Community events, the arts, animal shelters, sports and recreation, and particularly children and education have been the focus of Alpine Bank's philanthropy. Bob Young was recognized as the Colorado Philanthropist of the Year. In every Alpine Bank community, the bank is a major donor and supporter of local nonprofits.   | https://www.alpinebank.com/com<br>munity/community-investment.ht<br>ml   |
| Humane Society, Food<br>Bank  | https://animalsupply.com/   | Everything we do, we do to give pets happy and healthy lives. That's why we're so passionate about providing the best. That means in-demand brands, more options and products you can't find anywhere else. We connect trusted brands and independent retailers who share our belief that pets are part of the family. No partners listed onsite. Serves: WA, OR, CA, AK, HI, ID, MT, WY, CO, NM, AZ, NV, UT                             | https://animalsupply.com/about/o<br>ur-communities/  |
| Valley View Hospital, Boys<br>and Girls, Weld Food Bank,<br>Youthzone                           | https://www.bankofcolorado.com/com<br>pany/about-us   | Large variety of local CO organizations supported. No CSR presence on site.  |  |
| CCI   | https://www.getbarkyard.com/  | Made by dog lovers for dog lovers, BarkYard is an easy and effective<br>lawn care-kit specially formulated as a worry-free way to keep your<br>grass green and gift your four-legged friends with the lushest of<br>playgrounds. Giving back is a treat for BarkYard which is why they are<br>donating a percentage of all profits for any BarkYard product sold in<br>2020 to Canine Companions! Most likely an exclusive relationship. | https://www.getbarkyard.com/pag<br>es/our-story  |
| Conservation Resource<br>Alliance, Wildlife<br>Foundation of Florida,<br>Points of Light        | https://about.basspro.com/community/local-causes/   | Focus areas: Conserving Wildlife and Habitat, Connecting New<br>Audiences to the Outdoors, Advocating for Access and, Sportsmen's<br>Rights, Supporting Military and Veterans, Strengthening Communities in<br>the Missouri Ozarks. Could fall under connecting audiences to outdoors<br>and veterans  | https://about.basspro.com/comm<br>unity/   |
|   |   | Baylor Scott & White Health continually looks for innovative ways to achieve its mission, which includes providing people with access to personalized health and wellness resources. One life-changing resource for many with a disability is a service dog. Through a collaborative effort between Canine Companions and Baylor Scott & White Health, a dog   |  |
|   | Supported:  Prevent Blindness America, Guide Dog Foundation for the Bind, Guide Dogs for the Blind  Vail Veterans Foundation, Special Olympics, Canine Companions of the Rockies (2011)  Humane Society, Food Bank  Valley View Hospital, Boys and Girls, Weld Food Bank, Youthzone  CCI  Conservation Resource Alliance, Wildlife Foundation of Florida, | Supported:  Prevent Blindness America, Guide Dog Foundation for the Bind, Guide Dogs for the Blind  Vail Veterans Foundation, Special Olympics, Canine Companions of the Rockies (2011)  Humane Society, Food Bank  Valley View Hospital, Boys and Girls, Weld Food Bank, Youthzone  Https://www.bankofcolorado.com/company/about-us  CCI  https://www.getbarkyard.com/  https://www.getbarkyard.com/                                    | Prevent Blindness America, Guide Dog Foundation for the Bind, Guide Dogs for the Blind, Guide Dogs for the Blind B |





### **Corporate Prospect Research**





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Decisions about the compan

considered for a Cognex gra

sensors).

Facilities

Investors



#### **Our Focus Areas & Priorities**

Our entire company vision is built on the importance of healthier animals for healthier people and a healthier planet. And our Elanco Foundation carries this mission.



#### **Human-Animal Bond**

We aim to ensure everyone has the animal companionship they need to thrive, focusing on service dogs and animal-assisted interventions.



#### **Food Security**

We aim to ensure everyone access to high-quality meat, milk, fish, and eggs.



#### **Strong Communities**

We work to ensure food security and pet well-being in our communities.



#### Community Investment and Event Sponsorship Guidance and **Application Process**







IDEXX is committed to driving innovative and positive societal outcomes everywhere we do business. Our philanthropic mission is to create sustainable impacts for people, animals, and the environment through inclusive and solutions-focused initiatives. We support

worldwide organizations al facilities, offices, customer Habitat for Humanity Policy, and Policy on Politi Inclusion.

We're building more than just healthy habits.

Over the years, Transamerica employees nationwide have volunteered their time, energy, and spirit to help families build houses with Habitat for Humanity. In 2016-2017, Transamerica sponsored the first ever full house build in Denver from start to finish, making the home a little more affordable for the family of Francis and Schola.





#### Junior Achievement

We make learning about good spending and saving habits fun.

Transamerica is proud to be the title sponsor of Junior Achivement's IA Finance Park to promote financial literacy. Students become an adult for a day and immerse themselves in a reality-based decision-making process that involves budgeting, investments, philanthropy, banking, and more. Transamerica employee and JA board member Brian Florey says, "My experience with Junior Achievement has given me a genuine





## **Question Time**

How does your organization find corporate prospects?







When pursuing new corporate donor prospects you must have a strong value proposition. These are some of our favorite questions to ask when determining the value proposition:

- How does your organization align with their funding priorities?
- What is the ask?
- What will be the impact of their support?
- How can you describe and quantify the impact?
- How will this benefit their company?
- Are there opportunities for their employees to get involved?



| Company                            | Organization(s) Supported:   | Website                             | Funding Priorities/Notes  | CSR Page (If Available)   | Contact Information if Available | Notes                 |
|------------------------------------|--|-------------------------------------|---|---|----------------------------------|-----------------------|
| Addition Technology<br>Corporation | Prevent Blindness America,<br>Guide Dog Foundation for<br>the Bind, Guide Dogs for<br>the Blind                                      | https://additiontechnology.com/home | Located in IL, We work closely with recognized ophthalmologists, universities and technological centers to develop and manufacture innovative products to support medical professionals to improve their patients vision worldwide. Veterinary products. Supported multiple vision loss organizations in 2020. No CSR page on site.   | Seems to be a relatively new<br>funder, a few smaller donations<br>in the past few years, three<br>\$10k+ donations in 2020 | *Name and Email*                 | Emailed on 11/15/2021 |
| Bass Pro Shops                     | Conservation Resource<br>Alliance, Wildlife Foundation<br>of Florida, Points of Light  |                                     | Focus areas: Conserving Wildlife and Habitat, Connecting New Audiences to the Outdoors, Advocating for Access and, Sportsmen's Rights, Supporting Military and Veterans, Strengthening Communities in the Missouri Ozarks. Could fall under connecting audiences to outdoors and veterans. Can make a case for international support as they have focus in US and Canada.   | https://about.basspro.com/comm<br>unity/  | Application link                 | Submitted 11/17/2021  |
| Cognex                             | GEB (2015), Map<br>Community Services,<br>Beyond Vision, Vision<br>Forward Association,<br>Oregon Foundation for<br>Vision Awareness |                                     | In the U.S., Cognex makes donations to organizations and programs based in Natick, Massachusetts; Portland, Oregon; San Diego, California; and Milwaukee, Wisconsin. Contributions made under Cognex's corporate donations program reflect the company's philosophy of working hard, playing hard, and enhancing vision. Has given to programs that assist the blind and vision-impaired (in recognition of the fact that Cognex manufactures vision systems and sensors). Last gift date to GEB in 2014. | https://www.cognex.com/compan<br>y/philanthropy/giving-history  | *Name and Email*                 | Emailed on 11/15/2021 |
| Elanco                             | Southeastern Guide Dogs,<br>National Service Dog<br>Training Center, British<br>Columbia and Alberta Guide<br>Dogs                   | https://www.elanco.co<br>m/en-us    | Our entire company vision is built on the importance of healthier animals for healthier people and a healthier planet. And our Elanco Foundation carries this mission. Focus area and priority: We aim to ensure everyone has the animal companionship they need to thrive, focusing on service dogs and animal-assisted interventions. May be potential partner outside of Southeastern region.  | https://www.elanco.com/en-us/sustainability/the-foundation  | *Name and Email*                 | Emailed on 11/15/2021 |
|                                    | Big Dog Ranch Rescue,<br>Community Foundation of<br>Elmira and the Finger  | https://www.faganengi               | Smaller company. As active participants in organizations throughout the Southern Tier of the Finger Lakes region of New York and the Northern Tier of Pennsylvania, FE is dedicated to the growth and development of the Region and proud to spearhead projects that will add value for years to come. Supports lots of organizations in dedicated region (and beyond, seemingly). May be interested in creating a company  | https://www.faganengineers.com  |                                  |                       |



Prospects \*

Top Prospects ▼

#### **Evidence of our Shared Values**

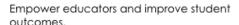




Committed to delivering integrated solutions that engage learners.

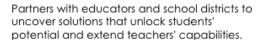


Organization's signature program is overseen by our staff of literacy experts, but implemented by in-school staff. This builds capacity and deepens existing school relationships.





Educators love to learn, and our targeted professional development series offers them career advancement and the opportunity to be a literacy leader, while impacting their students for years to come.





The more adults in a building who can teach students to read, the more students who can reach their potential.

### **Additional Partnership Opportunities**

#### Professional Development/Employee Engagement

- HMH employees can have the opportunity to host and participate in a professional development event to learn the methodologies behind teaching reading.
- We can facilitate opportunities for HMH employees to read with children from NYC Public Schools. We would welcome HMH staff to support in helping execute a Read Aloud Day.

#### Opportunity to Join an Exciting, Growing Nonprofit Board

 We have a dynamic board and are hoping to develop a junior board. HMH employees who are interested in supporting us are welcome to apply.

#### Opportunities to Fund Reading Programming in NYC Public Schools

 We rely on financial gifts from generous donors to carry out our programs in NYC schools. In-kind donations are also greatly appreciated.









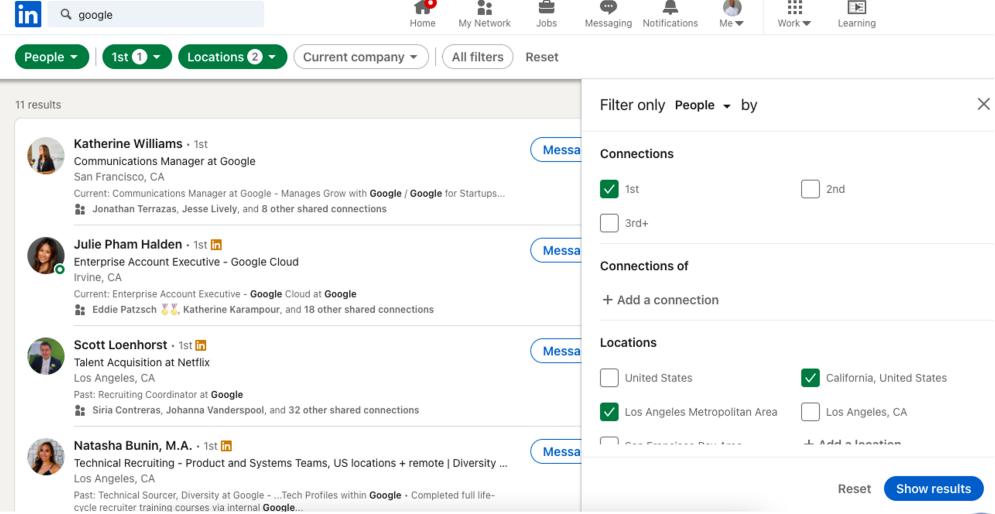
# Getting Introductions

## **Getting Introductions- Finding Connections**

| Company                                     | Organization(s) Supported:   | Website  | Notes  | Linkedin (Steve's Connections) | Notes   |
|---|--|--|--|--------------------------------|---|
| Northrup Grumman                            | Boys and Girls Club of<br>Greater Washington, City<br>Year, International<br>Association for Volunteer<br>Effort                 | http://www.northropgrumma<br>n.com/CorporateResponsibi<br>lity/CorporateCitizenship/Pa<br>ges/default.aspx | Global Corporate Volunteer Council member company  | 1st degree                     | Yes. Military Dependents strategy.  |
| Prudential Financial                        | Boys and Girls Club of<br>Greater Washington,<br>GenerationOn, Jefferson<br>Awards Foundation                                    | https://www.prudential.com/links/about/corporate-social-responsibility                                     | Honoree of the Civic 50, focus on underserved youth  | 1st degree                     | Yes. Good contact.  |
| PwC Foundation                              | Citizen Schools, Impact 2030   | https://www.pwc.com/us/en/<br>about-us/corporate-respons<br>ibility.html                                   | Focus on employee interest giving, education, and humanitarianism  | 1st degree                     | Good contacts at Impact2030   |
| SAP   | Citizen Schools, City<br>Year  | https://www.sap.com/about/<br>social-responsibility.html   | Annual Month of Service in October held throughout North America   | 1st degree                     | Good contacts at Impact2030   |
| Starbucks                                   | Boys and Girls Club of<br>Greater Washington, City<br>Year, Service Unites,<br>International Association<br>for Volunteer Effort | https://www.starbucks.com/r<br>esponsibility/community   | Global Corporate Volunteer Council<br>member company, index of local<br>community services projects on site                | 1st degree                     | Yes. Strong interest in opportunity youth and the 30% target we have for unengaged youth, especially 16-25. |
| Taco Bell/Taco Bell<br>Foundation for Teens | Boys and Girls Club of<br>Greater Washington, City<br>Year, DoSomething.org  | on.org/  | Focus on youth leadership and pursuit of education and career goals, scholarship program and invitation-only grant program | 2nd degree                     | Yes. Focus on youth service.  |
| i candation for feelis                      | real, poodmening.org   | https://www.tcs.com/about-   | grant program  | zna dogree                     | 100. 1 oods on your service   |



## **Getting Introductions- Finding Connections**





## **Getting Introductions- Templates**

Hello (Name),

I hope you are doing well. (Add personal anecdote if you'd like.) I would like to introduce you to Steve from the Youth Organization. As you may know, I have served on the Youth Organization's Board of Directors for the past two years. Their mission is to help all young people find their voice, take action, and make an impact on vital community issues. (Add personal reason for being involved/why you love the organization.)

As the year draws to a close, the Youth Organization is committed once again to activating young people, ages 5-25, to improve their community. With a 2022 goal of activating 500,000 children and youth leading 5,000 projects, they will need all of the corporate support that they can get. I hope you are able to connect with Steve and his team to learn more about the great work that Youth Organization is doing in the community, and perhaps find a way for (Company Name) to support their efforts. Thanks in advance for considering, I look forward to speaking with you soon.

Have a nice day,

**Board Member** 



## **Question Time**

Are your Board members making introductions for you?





## Quick Recap

- 1) Use a Market Analysis to gather information from your sector and find your competitors.
- 2) Determine what you can offer and how you can stand out.
- 3) Use Corporate Prospect Research to find companies that already love what you are doing.
- 4) Find value propositions- creative ways to speak to them and partner with them.
- 5) Search for connections you already have and use them!







# Questions?

#### **Contact:**

Chris Hammond chris@cgcgiving.com 323.238.5431 cgcgiving.com





