

# PROSPECT RESEARCH FORUM

# 2016

## RESEARCH IN AUSTRALIA AND ABROAD



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RESEARCH IN AUSTRALIA  
AND ABROAD

## AGENDA

## FRIDAY 6 MAY 2016

9:00AM - 10:00AM

**Registration**

10:00AM - 10:20AM

**Forum Opening & Welcome from the Executive Director, Advancement**

*Paul Dennett and Eresha De Silva, Macquarie University*

Acknowledgement of Country and opening of the third annual Prospect Research Forum.

### PROSPECT RESEARCH: TRENDING

10:20AM - 11:20AM

**Extra! Extra! Breaking News for Prospect Researchers**

*Elizabeth Roma and Rachel Dakarian, Helen Brown Group*

Elizabeth and Rachel discuss megaphilanthropy, philanthrocapitalism, and the rise of family offices, with particular focus on philanthropic trends in the United States. They will share interesting insight into the recent controversial naming gifts and provide guidance on best practices prospect researchers navigating this new landscape.

10:50AM - 11:20AM

**Changes in Australian Major Giving: What Do We Know?**

*Molly Masiello and Conor McCarthy, FR&C*

Molly and Conor provide insight into the landscape of major giving and how it has changed and impacted the culture of philanthropy in Australia. They will look at various data sources, with a focus on newly-available data from the ACNC.

11:20AM - 11:35AM

**Morning Tea**

II

### FRONTIERS IN PROSPECT RESEARCH

11:35AM - 12:05PM

**The Vitruvian Man: An Anatomy of Prospect Research**

*Alice Robinson, Belinda Partyga & Jarrod Hore, Macquarie University*

Vitruvian Man is perhaps Leonardo da Vinci's most famous illustration. Just like Leonardo, who used both image and text to express the ideas and theories of Vitruvius, see how the research group at Macquarie University has developed their anatomy of Prospect Research.

12:05PM - 12:35PM

*In Conversation with Edwina Kenrick & Nikki McGreggor*

*Edwina Kenrick, Melbourne University and Nikki McGreggor, the University of Sydney*

Edwina and Nikki will talk about challenges faced during Campaigns.  
*Facilitated by Paul Dennett, Executive Director, Office of Advancement*

12:35PM - 1:05PM

**Prospect Researchers and Fundraisers: Partners in Crime**

*Emma Hayward, Deakin University*

Winning over fundraisers and managing the prospect research and fundraiser relationship. Emma will share how Deakin University has worked to build strong relationships with their fundraisers in a time of change, and turn negative perspectives around new relationship management systems and processes into positive ones.

# PROSPECT RESEARCH FORUM 2016

## RESEARCH IN AUSTRALIA AND ABROAD

1:05PM - 2:05PM

### Lunch

#### *Explore Macquarie University*

Tours depart at  
1:30PM from top  
foyer

#### Office of Advancement

Come see where  
we work and our  
new art collection.



#### Library

Four computer controlled  
robotic cranes for storage  
and retrieval.



#### Art Gallery

Light Years Ahead: Paula  
Dawson, Ian Milliss &  
Vernon Treweeke



### METHODS AND RESOURCES: BEST PRACTICE IN PROSPECT RESEARCH

2:05PM - 2:35PM

#### *On the Couch with Gnosis: Hu Runs the World?*

##### *Tze Hoong, Gnosis*

Get up close and personal with Tze, Director of Gnosis, and a pioneer in  
wealth screening and prospect research in Asia.

*Facilitated by Hedda Paisley, Director of Development.*

2:35PM - 3:05PM

#### **Ring Before You Write: Engaging Trusts and Foundations**

##### *Cathy Kirwan, Strategic Grants*

Trusts and Foundations are a key part of any successful fundraising program.  
Cathy will examine how organisations can build successful revenue streams  
through their Trust and Foundation program. She will also look at the value of  
building strong relationships with Trusts and Foundation, in the same way as  
any major donor, to optimise outcomes.

3:05PM - 3:35PM

#### **Fishing the WWW: Reeling in the Big Fish**

##### *Graeme Byrne, Lagotto Solutions*

Graeme is the Founder of Lagotto Solutions, and will share how the creation  
of his intelligent software helps clients unearth their best prospects and  
generate leads.

3:35PM - 3:50PM

#### **Afternoon Tea**



### CONTEMPORARY ISSUES IN PROSPECT RESEARCH

3:50PM - 4:20PM

#### **Making Major Gifts Sizzle with Social Media**

##### *Jennifer Filla, Prospect Research Institute*

Join Jennifer as she explores how social media has exploded onto the  
fundraising scene and how it is impacting major giving programs. She will  
discuss some of the key vendors in the prospect research space as well as  
personal favourites for filtering the fire hose of data.

4:20PM - 5:00PM

#### **Let's Talk About...**

Group discussions. Topics to TBC on the day.

*Facilitated by Stephen Rowe, Australian National University.*

5:00PM - 5:15PM

#### **Forum Close**

##### *Eresha De Silva, Macquarie University*

Wrap up and Forum close.



### NETWORKING RECEPTION: UBAR

### INTERNATIONAL SPEAKERS & CONSULTANTS



**Rachel Darakin, Helen Brown group, USA**

Rachel is fundraising professional with non-profit and political campaign experience. Rachel is a member of APRA and sits on the board of the APRA-Great Plains chapter. She also serves as President of the Board of Directors for Wheatsfield Cooperative Grocery in Ames, Iowa.



**Elizabeth Roma, Senior Researcher, Helen Brown Group, USA**

Elizabeth is a senior researcher at The Helen Brown Group. Elizabeth has had the opportunity to work with non-profit organizations in a variety of sectors, including biomedicine, arts and culture, education, and human and social services. Elizabeth is a member of APRA International and is president-elect of APRA-Carolinas. She is a graduate of the University of Pennsylvania.



**Molly Masiello, Research Manager, Fundraising Research & Consulting**

Molly joined FR&C in March 2014 and brings a wealth of experience in prospect research and management in the Higher Education sector. She specialises in prospect research and management, data analytics, and database management.



**Connor McCarthy, Consultant, Fundraising Research & Consulting**

Conor McCarthy joined FR&C as Managing Director Australia in 2011. Conor has substantial expertise in prospect research, implementing moves management programs, policy development, fundraising CRM implementation, and training.

**Tze Hoong, Director, Gnosis, SG**

Tze is an important figure in prospect research in Asia today and the tools and services he is creating has the potential to revolutionise fundraising in the Pacific. Backed by over 20 years of experience in research and data, Tze has helped position many clients roll out their fundraising campaign in Asia.



**Cathy Kirwan, Research Manager, Strategic Grants**

Cathy has over 20 years of experience in the non-profit sector with extensive experience in the philanthropic sector, as a Fundraising Manager in a variety of non-profit organisations, and in private practice as a fundraising and communications consultant.



**Graeme Byrne, Director of Development, University of East Anglia, UK**

Graeme has been at UEA for seven years before which he worked for a number of charities including The Papworth Trust and The Prince's Trust. Graeme has also been an Associate Partner at More Partnership for four years. He is also a Founder of Lagotto Solutions, which creates intelligent software to help its clients unearth their best prospects and generate leads.



**Jennifer Filla**

For more than ten years Jen has been helping fundraisers with prospect research. She is President of Aspire Research Group LLC, CEO of the Prospect Research Institute and co-author of Prospect Research for Fundraisers: The Essential Handbook.

### INDUSTRY REPRESENTATIVES

**Eresha DeSilva, Manager Prospect Research, Macquarie University**  
**Alice Robinson, Prospect Research Assistant, Macquarie University**  
**Belinda Partyga, Prospect Research Coordinator, Macquarie University**  
**Jarrod Hore, Prospect Research Administrator, Macquarie University**  
**Edwina Kenrick, Head of Research & Prospective Donor Management, University of Melbourne**  
**Nikki McGreggor, Director, Advancement Services, The University of Sydney**  
**Paul Dennett, Executive Director, Office of Advancement, Macquarie University**  
**Emma Hayward, Manager Donor and Prospect Research, Deakin University**  
**Hedda Paisley, Director Development, Macquarie University**  
**Stephen Rowe, Prospect Research & Briefing Manager, Australian National University**

# NOTES



**MACQUARIE**  
University

