



Australia Chapter

PROSPECT DEVELOPMENT CONFERENCE

9 – 10 NOVEMBER

2021

DAY ONE
TUESDAY
9 NOVEMBER

NB: all times are AEDT

AGENDA & CONFERENCE SCHEDULE

10:00 AM – 10:10 AM

Welcome and Housekeeping, Victoria Coyne

10:10 AM – 10:50 AM

The Implications of COVID on Long-Term giving
Presented by John McLeod, JBWere Philanthropic Services

10:50 AM – 11:20 AM

Uncovering Funds from Trusts and Foundations
Presented by Eresha de Silva, Macquarie University

11:20 AM – 11:50 AM

Prospect Management Reporting
Presented by Pauli Kautoke, University of Queensland

11:50 AM – 12:20 PM

LUNCH

12:20 PM – 12:50 PM

Driving Success in a Capital Campaign
Presented by Tessa Irwin and Belinda Clark, Powerhouse Museum

12:50 PM – 13:20 PM

BREAKOUT SESSION

13:20 PM – 13:50 PM

Big Team Results: Adding value day-to-day and beyond
Presented by Stephen Barwald, University of Sydney

13:50 PM – 14:00 PM

Close of Conference Day One, Victoria Coyne



Australia Chapter



DAY TWO WEDNESDAY 10 NOVEMBER

NB: all times are AEDT

AGENDA & CONFERENCE SCHEDULE

10:00 AM – 10:10 AM

Welcome and Housekeeping, Stephen Rowe

10:10 AM – 10:50 AM

Careers as Diverse as Our Prospects!

Presented by Kim Hill and Peter Demertzidis, World Vision

10:50 AM – 11:20 AM

Due Diligence Survey Results

Presented by Dana Lutat, Griffith University

11:20 AM – 11:50 AM

Knowledge Graphs: Leverage your data for better understanding and better engagements

Presented by Jason Cromarty, Barbalet, Psithur Australia Pty

11:50 AM – 12:20 PM

LUNCH

12:20 PM – 12:50 PM

Don't Leave Your Data in the Dark: Using predictive analytics to identify your top prospects

Presented by Edwina Kenrick and Tania Fernando, University of Melbourne

12:50 PM – 13:20 PM

BREAKOUT SESSION

13:20 PM – 13:50 PM

Four Retrenchments and a Pandemic

Presented by Emma Hayward and Jonathan Cosgrove, Deakin University

13:50 PM – 14:00 PM

Close of Conference & Farewell, Stephen Rowe



Australia Chapter



BONUS INTERNATIONAL SPEAKERS

AVAILABLE ONLINE POST-
CONFERENCE

Attacking Bias in Your Prospect Research Practice
Presented by Jennifer Filla, Prospect Research Institute

Q&A with Gareth Griffin and Julian Kuzma
*An interview by Julian Kuzma, University of Otago with
Gareth Griffin, Massachusetts Institute of Technology*

Conference attendees will directly receive international special guest sessions to their inbox.

CONFERENCE SESSIONS

The Implications of COVID on Long-Term giving

Presented by John McLeod, JBWere Philanthropic Services

We examine the trends in giving during COVID and how each cause area was affected. We also look at this in the context of the evolution in Australian philanthropy and the growing influence of high net wealth giving, corporate community investment and the looming intergenerational wealth trans

Learn: What happened to giving during COVID and the long-term trends in philanthropy are accelerating.

Uncovering Funds from Trusts and Foundations

Presented by Eresha de Silva, Macquarie University

Trusts and Foundations are an underutilised resource available to fundraisers in Australia and New Zealand. Particularly in times of difficulty such as a pandemic, why not turn to a sure donor? This presentation covers the background, research and related information required to pursue trusts and foundations in the domestic and international environment.

Learn: What you may be missing when looking into Trusts and Foundations. How to research Trusts and Foundations both in Australia and abroad and considerations when applying for grants.

Prospect Management Reporting

Presented by Pauli Kautoke, University of Queensland

Pauli Kautoke will discuss the different types of prospect management reports used at University of Queensland. These reports help both the Prospect Development team and fundraisers keep track of portfolios and help guide and plan prospect activities.

Learn: About the different types of prospect management reports used at UQ and how to use these reports to help fundraisers and the Prospect Development team.

Driving Success in a Capital Campaign

Presented by Tessa Irwin and Belinda Clark, Powerhouse Museum

The Powerhouse is embarking on one of the largest cultural infrastructure projects currently being undertaken in Australia and seeks philanthropic support to finish the build, and fund the fit-out and first year of programs. Hear how a newly created team has leveraged prospect research on their journey to achieving major gift success and the different practices used in a capital campaign context.

Learn: How to best utilise research methods in a capital campaign in finding the right campaign donors and advocates, getting connected to new prospects, and better informing the ask.



CONFERENCE SESSIONS

Big Team Results: Adding value day-to-day and beyond

Presented by Stephen Barwald, University of Sydney

The University of Sydney's Prospect Development team is currently comprised of seven members and still has more growth to come. The team's ways of working changed in 2021 to align with the Development team's areas and add specialisation of research and relationships. The team handles regular prospect development requests and now also offers expanded services, in a shift, to become more proactive: changes were initiated to better manage timeliness and take control of the 'work request' process. We set parameters for volume of prospect identification, engage early and on an ongoing basis with the Development and Events teams to understand our events schedule, join team meetings and even launched an effort to automate the creation of our prospect event brief.

Learn: How to showcase the tasks and responsibilities Prospect Development does to add value and demonstrate the value of Prospect Development to senior leaders and a wider audience.

Careers as Diverse as Our Prospects!

Presented by Kim Hill and Peter Demertzidis, World Vision

Kim and Pete have had very different career paths, and this will be a lively interview between the two about how they came to their current roles. They will also offer some other less travelled paths not just their own. With a few minutes at the end for questions and discussion with audience on their journey.

Learn: How skills from previous roles support the work they do now and how to work well with people from diverse backgrounds.

Due Diligence Survey Results

Presented by Dana Lutat, Griffith University

A decade ago, managing reputational risk was for institutions' executives and their public relations teams. Now it is an increasingly big part of the broader profession of prospect development to ensure that donor engagement and gift acceptance is informed by thorough and evidence-led research. So now that we've had some time to embed these practises, what does the broader landscape of due diligence practise look like in the region? The just-completed Apra Australia survey will help tell us, and while analysis is ongoing, the results and implications will make for interesting viewing! This survey was produced with the help of BWF Fundraising Solutions, and Jason Briggs of Pyro CIC training.

Learn: How to assess and reflect on common high-level practises and procedures of colleagues, both from raw data and analysis of that data.

Knowledge Graphs: Leverage your data for better understanding and better engagements

Presented by Jason Cromarty and Felix Barbalet, Psithur

Data underpins the success of Advancement teams - how they gather and organise data is critical for finding and understanding prospects, connecting with alumni, and achieving fundraising targets. Big organisations such as Facebook, Amazon, Google and Atlassian are turning to knowledge graphs to organise their data, and many of the lessons learned by those organisations are applicable to Advancement teams. Leveraging your data with knowledge graphs means being able to see where the connections are, discover new pathways and glean better insights into prospective donors, customers, constituents.

Learn: The basics of knowledge graphs and the potential benefit for prospect research teams in utilising this technology. We will also provide our top-five tips for taking your first steps into the world of knowledge graphs.



CONFERENCE SESSIONS

Don't Leave Your Data in the Dark: Using predictive analytics to identify your top prospects

Presented by Edwina Kenrick and Tania Fernando, University of Melbourne

In 2021 the University of Melbourne went live with a new propensity score to predict a \$100K and over major donors to complement our capacity ratings. This is the collaborative story of how that was built by the Customer Insights Team and is being utilised by the Research Team.

Learn: How to define a propensity model to identify major donors and how to utilise a propensity score in your prospect development work.

Four Retrenchments and a Pandemic

Presented by Emma Hayward and Jonathan Cosgrove, Deakin University

Despite a significant reduction in its resourcing, how has Deakin Advancement successfully overhauled its major gift practice by placing prospect strategy at the heart of its approach to fundraising?

Learn: About Deakin's journey to overhaul their prospect management framework, including redevelopment of fundraiser KPI's, training, pipelines, processes, and procedures. Also, why they felt an overhaul of their major gift practice was necessary, lessons learned, and what's next.

RECORDED SESSIONS

Attacking Bias in Your Prospect Research Practice

Presented by Jennifer Filla, Prospect Research Institute

Bias is not a political concept. It is a long-documented reality of the human condition. Researchers of all stripes have been fighting to keep bias out of their results since scientific research began. Jen Filla shares some psychological principles at work, stories and practical tips for prospect research, and a look into the conversation around bias in artificial intelligence and machine learning.

Learn: How to recognise various common types of bias from the field of psychology. Apply practical steps to change personal research behaviours. Awareness of key issues around bias in A.I. and machine learning.

Q&A with Gareth Griffin and Julian Kuzma

An interview by Julian Kuzma, University of Otago with Gareth Griffin, Massachusetts Institute of Technology

Prospect Researcher, Julian Kuzma interviews Gareth Griffin, Senior Director of Prospect Development at MIT on lessons learned from their recent \$6.24B MIT Campaign for a Better World.

Learn: Challenges and role of prospect development in major gift campaigns and about large-scale institutional fundraising and research structure, international comparison, maintaining research momentum, projections for the future of prospect research, prospect development careers, the benefits of quilting as a hobby.



ABOUT OUR SPEAKERS

Steven Barwald

Associate Director, Prospect Development, University of Sydney

Steven has been leading a growing USyd Prospect Development team since the beginning of 2020 focusing on generating pipeline opportunities to meet fundraisers goals and match their donor's ambitions. Steven's experience comes from corporate sales operations, and specialised research positions across e-commerce, HR tech and market research. His core skills include CRM database management and reporting, lead management, strategic analysis, and process improvement.

More recently Steven's focus has been on scaling and streamlining prospect developments ways of working in a new CRM and on honing due diligence principles and processes to protect and enhance the University of Sydney's reputation.



Belinda Clark

Campaign Research Manager, Powerhouse Museum

With a passion for philanthropy and its impact, and over nine years' experience working in fundraising and prospect research, Belinda specialises in donor identification, engagement and stewardship, as well as data analysis, prospect management and pipeline development.

She has worked in varied roles across the arts and higher education, including Capital Campaigns for the Australian Chamber Orchestra and currently Powerhouse Parramatta.

Belinda is Chair of this year's Apra Conference Committee and has also been involved in Apra Australia's 2016, 2017 and 2019 conferences.

Jonathan Cosgrove

Director, Development, Deakin University

Jonathan leads a talented fundraising team to support the University's ambitions. He has spent the majority of his career in higher education advancement, building and leading programs and teams across the University of Bristol, the University of Melbourne and the University of Queensland. He is especially passionate about marrying the science and art of major gift fundraising.

He spends his spare time running, and drinking interesting beers. Ideally not at the same time – but sometimes that's just the way it has to be.



Jason Cromarty

Co-founder, Psithur

Jason is a technology leader and data evangelist with more than a decade of experience representing and advocating for user-perspectives in IT projects. In 2020 Jason co-founded Psithur to help fundraising organisations strategically grow their prospect pipelines by better leveraging in-house and third-party data. Jason holds a Bachelor of Engineering (RMIT), a Graduate Diploma of Computing (ANU) and is a graduate of the Executive Education program at Kellogg School of Management.



ABOUT OUR SPEAKERS

Peter Demertzidis

Senior Prospect Researcher, World Vision Australia

Peter has been a Prospect Researcher since 2013. Since 2017 he has been the Senior Prospect Researcher at World Vision Australia. Previously he worked as a Prospect Researcher at the Australian National University and the University of Melbourne supporting fundraising for the “Believe Campaign”.

Before transitioning to the fundraising sector at the ANU he worked as an Intelligence Analyst, for around 8 years, within the Australian National Intelligence Community.

He has completed a BA (Sociology) and a Graduate Diploma in International Development.

Eresha de Silva

Prospect Development Specialist, Macquarie University

Eresha has been in providing intelligence for fundraising for over twelve years and was instrumental in founding the Macquarie University prospect development function. She has an information technology and IT project management background with a focus on CRM Systems.

Eresha has a wide range of experience in prospect development, worked with both domestic and international consultant companies and built a global network within the industry. Her team at Macquarie University organised the Prospect Researcher’s Forum (now APRA Australia conference) in 2016 where international speakers were present for the first time.

She was also involved in the APRA Australia founding committee and is in the APRA Australia mentor program since 2020.



Tania Fernando

Manager, Customer Insights, University of Melbourne

As Manager Customer Insights, Tania manages all reporting and BI platforms in The University of Melbourne Advancement Office. She works closely with all other Advancement teams and with her team, provides insights and reports to support the strategy and decision-making processes. She holds a Master of Science in Information Technology and has over 14 years of experience in the data and analytics field. She has conducted research in databases and machine learning as an academic and has developed machine learning models in both academic and professional settings. Her research interest areas include, Learning analytics, Behavioural analytics and Psychology.

Emma Hayward

Manager of Prospect Strategy, Deakin University

Emma is a dedicated knowledge professional with a diverse career spanning the public, private and higher education fields. She has over 12 years’ experience as a Prospect Researcher, first as the Manager of Prospect Research at the University of Auckland, where she was a part of the Universities first ever capital campaign, and currently as the Manager of Prospect Strategy at Deakin University.

She is experienced in all aspects of prospect research and management, as well as setting up a prospect research unit and building a team.



ABOUT OUR SPEAKERS

Kim Hill

Head of Prospect Development, World Vision Australia

Kim Hill has been in major gift fundraising for over 15 years, both here in Australia and the United States. Having worked in both prospect research and leading teams of major gift officers, she has a unique insight into the important role prospect research and development has in securing funding.

Kim began her career in the university sector with the University of Sydney, University of Technology, Sydney and the University of California Los Angeles before transitioning into the charity sector with ChildFund and now as Head of Prospect Development at World Vision. Working on some of the largest capital campaigns both here and in the United States, as well as global sports partnerships such as the Rugby World Cup, Kim has seen the power of philanthropy to quite literally change the world.

Outside of her professional roles, she has volunteered on charitable boards and events focusing on the empowerment of women and girls.

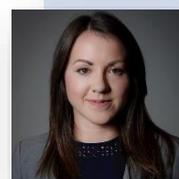
Tessa Irwin CFRE EMFIA

Senior Manager, Campaign, Powerhouse Museum

Tessa is a passionate big gift fundraiser who thrives working on capital campaigns that bring transformational change to communities and organisations.

She is currently helping to drive philanthropic support for the Powerhouse Parramatta capital campaign. She worked on capital campaigns and major gift programs for five and a half years as a Consultant with Xponential, and previously worked for Opportunity International Australia.

Tessa loves to support the growth and development of fundraisers and the profession of fundraising. She is co-founder of the Australian Philanthropy Network (formerly the Philanthropy Special Interest Group Sydney), has been on the Fundraising Institute Australia NSW Committee since 2017, serving as state Chair in 2019-2020, and sits on the FIA Awards for Excellence in Fundraising Advisory Committee. Tessa completed her Certified Fund Raising Executive accreditation in 2020 and was named FIA's NSW Young Fundraiser of the Year for 2020.



Pauli Kautoke

Prospect Development Manager for Advancement, University of Queensland

Pauli joined the UQ Advancement team in 2014, became the Advancement Information Services Manager in 2016 and have been in his current role since 2018. He currently manages a range of comprehensive tools and services to support fundraisers with prospect identification, research and management. He is driven to take Prospect Development to the next level by utilising data, technology and genuine partnership with other university areas.

Pauli holds a Bachelor in Computer Science from the University of Canterbury and a Master of Information Technology Studies from UQ. Before joining UQ, Pauli led various IT initiatives in the Kingdom of Tonga.



ABOUT OUR SPEAKERS

Edwina Kenrick

Head of Prospect Research and Management, University of Melbourne

As a prospect development professional, she has been integral to the planning and implementation of the University's ongoing Believe campaign which aims to raise \$1 billion by the end of 2021.

Many years ago, she established the prospect research team at the University and has designed and regularly updates the research and prospect management systems and processes. As well as holding down her main job overseeing prospect development, she is currently also a Subject Matter Expert working with the University's OneCRM team to move Advancement's operations onto a university-wide Salesforce platform, utilising Affinaquest.

She holds a Bachelor of Arts degree from the University of Melbourne and a Graduate Diploma (Information Services) from RMIT University.

Dana Lutat

Senior Prospect Researcher, Griffith University

Dana is an experienced Senior Prospect Researcher at Griffith University. As a one-person team she is responsible for prospect identification, research, management and strategy for an Advancement team of 30. Prior to working in prospect research, Dana had a corporate career in business development and sales where she was responsible for developing her own client base from scratch - from research to matching interests to cold calling to closing deals to delivering consulting services.

Dana has been a volunteer for Meals on Wheels for seven years and is a passionate bibliophile, Francophile, urban sketcher, Sashiko seamstress and swimmer.

John McLeod

JBWere Philanthropic Services

John co-founded JBWere Philanthropic Services in 2001 after 16 years as a financial analyst and manager of the Resource Research group within the firm's top-ranking strategy team.

He researches and produces widely read reports on the operation of and trends in the for-purpose and philanthropy sectors. He co-authored the *Impact – Australia* report in 2013 highlighting the practice and growth potential for Impact Investing and more recently co-authored *Growing Impact in New Zealand*, released at the Social Enterprise World Forum held in Christchurch in 2017. He also authored *The Cause Report* examining the evolution of the NFP sector in Australia over the last 20 years and examined the implications for its future direction. He has compiled the annual list of Australia's major philanthropists for the Australian Financial Review's (AFR) annual special, *Philanthropy 50* since 2016. In 2018, John authored *The Support Report* which focused on the dramatic trends occurring in Australian giving and the implications for recipients over the coming decade. More recently, he also authored the *JBWere NAB Charitable Giving Index* report providing a timely view on giving during COVID. John has co-authored the list of Australia's top 50 companies for corporate community investment published in the AFRs Boss magazine since 2019. He also sits on the Board of several charities including Summer Housing and Philanthropy Australia.



ABOUT OUR INTERNATIONAL PRESENTERS

Jen Filla

Founder & CEO, Prospect Research Institute

A resourceful fundraiser with an innovative focus on prospect research, it's a great day for Jen when she can help an organisation focus and connect with its best donor prospects as President of Aspire Research Group LLC or help a prospect research professional learn and apply a new skill as CEO of the Prospect Research Institute.

Deeply committed to advancing philanthropy and the fundraising profession, Jen is co-author of *Prospect Research for Fundraisers: The Essential Handbook*, part of the AFP-Wiley Fund Development Series and has authored numerous prospect research workbooks. She has also served as a volunteer and trustee for numerous organisations over the years including The Center Foundation and Habitat for Humanity of Delaware County, Pennsylvania.

Jen is a member of the Association of Professional Researchers for Advancement (APRA) and the Association of Fundraising Professionals (AFP), serving on both local chapter boards. She received a B.S. from Neumann University.



Gareth Griffin

Senior Director of Prospect Development, Massachusetts Institute of Technology

Gareth Griffin is the Senior Director of Prospect Development at MIT, where he leads the institute's prospect research, prospect management, philanthropic due diligence, and prospect data integrity programs. Prior to heading back east, he was the Senior Director of Prospect Management & Analytics at Santa Clara University and Assistant Director of Prospect Management at UC Berkeley. Before heading west to California, he served as a Prospect Research Analyst at Clemson University. He currently serves as a Trustee of the Apra Foundation and was previously the Chair of Apra's Ethics & Compliance Committee.



THANK YOU TO OUR MC's

Victoria Coyne

Manager, Prospect Development and Research, Western Sydney University
Board Member, Apra Australia

Stephen Rowe

Prospect Research & Briefing Manager, Australian National University
President, Apra Australia

THANK YOU TO OUR TECH SUPPORT

Molly Masiello

Research Manager, Fundraising Research & Consulting
Secretary, Apra Australia

Belinda Clark

Campaign Research Manager, Powerhouse Museum



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**On behalf of Apra Australia, we hope you enjoy the 2021 Conference.
We look forward to seeing you next year!**



Australia Chapter

