apra

Australia Chapter

APRA AUSTRALIA CONFERENCE 2019

HOSTED BY

ANCORA IMPARO

MONASH University

CONFERENCE SCHEDULE

Sunday 10 November	
5pm – 5:30pm	Apra Australia AGM The Racecourse Hotel, 895 Dandenong Road, Malvern East, Melbourne
5:30pm – 8:00pm	Evening drinks / dinner
Monday 11 November	
8:30am – 9:00	Arrival tea and coffee Registration
9:00 – 9:15	Welcoming address, Stephen Rowe
9:15 – 9:55	***Strategic Discussion – Stepping Away from Cleanup and Focusing on Meaningful Conversations*** *Holly Weimer, The University of Georgia (video presentation)* Leadership likes to use the phrase "strategic discussions", but what does that mean and how do you accomplish it? How we moved away from clean up focused Prospect Management meetings and transitioned into a more meaningful conversation with Development Officers about their portfolio and prospects.
10:00 – 10:30	***Creating a comprehensive Prospect Management Handbook*** *Chris Lang, The University of New South Wales* Over the past 18 months, the UNSW Philanthropy Division has implemented a comprehensive Prospect Management Handbook, which includes solicitor roles, prospect status and classification, portfolio reviews, reassignment requests, and health checks for anomalies. Initially created for the Development team, it has been expanded and adapted to include Future Giving, Lead Annual Giving, and Alumni & Engagement. Learning objective #1: Attendees will learn how to develop their own prospect management procedures and awareness of exceptions or caveats. Learning objective # 2: Attendees will also learn how a wide range of staff and leadership were consulted to ensure approval and implementation of division-wide policies and procedures.

10:30 – 11:00	Morning Tea
11:00- 11:40	***A Family Affair - An inter-generational approach to researching HNW and influential families, and using the family networks to leverage the best outcome for major gifts; in Australia, Asia and the world*** *Eresha de Silva, Macquarie University* Learning objective #1: Attendees will learn intergenerational differences and views on charitable giving. Learning objective # 2: Attendees will learn about researching family networks in Australia, Asia and the world (UK, US and the Middle East mainly) to find the funds. Learning objective # 3: Attendees will learn some strategy and items to consider when approaching families for major gift.
11:45 - 12:25	***Relationship Mapping*** *Kimberley Payne & Rob Wong, Monash University* As part of our endeavours to improve how we present our work to fundraisers, our team at Monash University has been investigating the opportunities that relationship mapping could present to us. In this, we would like to clearly represent the connections that some of our engaged prospects have, and the networks that these connections could open up for us. This opens up a number of opportunities for us: to find more like-minded individuals to be part of our philanthropic journey that we already have connections to, (that we may not have known about previously), and to find connections to recommended or key interest prospects that we have been unable to reach in the past. This provides a simple and clear visual representation of how we can assist and support fundraisers to more efficiently and effectively manage the relationships and prospects in their pools. Learning objective #1: Attendees will learn about Monash's journey to better understand and support our fundraisers through visual and easy to use relationship mapping tools. Learning objective # 2: Attendees will learn about the approach we have chosen to take, and why we thought this was the best approach given the costs and benefits we weighed up.

12:30 - 12:45	***Change the system: Change the Mindset – Improving Portfolios and Pipelines*** *Susan van Oorschot and Priya Kanji, the University of Auckland* The University of Auckland launched a campaign in 2016 without developed portfolio management and pipeline monitoring systems. Fundraisers were working on immediacy rather than seeing overall structure of their portfolio and future planning. Monthly progress meetings between Fundraisers and the Director were based solely around Action reports (not always up to date) and discussions were more KPI focused than portfolio-based. Portfolio health was not covered in an evidence-based way, making it hard to assess whether the pipeline was working well enough to achieve Campaign goals. In 2018 Raiser's Edge NXT was implemented as a way of engaging fundraisers more with the database and encourage all relevant information to be entered and be easily accessible on the go. In anticipation of this we created a new system for prospect management that enabled us to report on portfolio health and movement through the pipeline. This involved both using the new features available in NXT as well as adapting fields in RE7. Learning objective #1: Attendees will learn how adopting an end-user friendly system has improved fundraiser engagement in pipeline and portfolio management during the campaign. Learning objective # 2: Attendees will learn what we have found to be the benefits when changing to a new database, and how we overcame some of the roadblocks.
12:45 – 1:45	**Lunch**
1:45 – 2:15	**Roundtable discussions**
2:15 - 2:30	***An insight into Prospect Research and Management's role in the recent $1 billion INSPIRED campaign at the University of Sydney*** *Babette Pearson, The University of Sydney* Learning objective #1: Attendees will learn prospect research strategies for contributing to a successful fundraising campaign in Australia. Learning objective #2: How to assist your organisation by adapting to changing needs with each stage of the campaign cycle.

2:35 – 2:50	***The Discipline of Intelligence Collection*** *Reed Foster, Murdoch University* Prospect research practitioners will be advised of how the intelligence collection cycle is applied beyond the realm of the higher education and not-for-profit sector and how a systematic approach to collection may improve an organisation's ability to exploit critical information. Learning Objective: The presentation will endeavor to encourage alternative methods of approach for research and analysis while highlighting specific resources and techniques for social media monitoring (engagement) and geospatial intelligence (assets and real estate)
2:50 – 3:15	**Afternoon Tea**
3:15 - 3:55	***Key Trends in Major Giving*** *Conor McCarthy, Fundraising Research & Consulting* Australian philanthropy is changing at great speed, and this presentation gives an overview of some key trends, including: Ongoing increases in Australian wealth (the average top 250 rich lister is now a billionaire); The rise of the billion-dollar donors; Major giving's increased share in giving overall (tax data shows that 46% of all individual giving now comes from the 0.15% of donors who give $25k+ annually); Trends in different sorts of PAF giving; The different ways HNWIs are engaging in giving (philanthropy, impact investment, etc); International comparisons, and lastly what we know and what we don't. This presentation includes detailed information and analysis of all these trends. Learning objective #1: Attendees will understand some of the key shifts occurring in the rapidly changing Australian philanthropy market. Learning objective # 2: This wider overview should help colleagues across the sector to contextualise their own prospect research and analysis in light of wider trends.
4:00 - 4:45	**Q&A with John Stensholt, Editor of *The List*** Bring your questions about anything and everything to do with rich lists! John will talk about the secrets behind putting together The List of Australia's Richest 250 and what it's like to deal with Australia's most successful and colourful entrepreneurs. This session will start with a facilitated conversation and then open up to questions from the audience.
4:45 - 5:00	Concluding remarks

SPEAKERS

Eresha de Silva

Prospect Development Specialist, Macquarie University

Eresha was responsible for establishing the prospect development function at Macquarie University and has been working in this area for over ten years. As well as all the regular prospect development activities, Eresha has had a particular focus on international research including the Asian region and the UK. Eresha and her team were instrumental in organising the Prospect Research Forum (now Apra Australia conference) hosted by Macquarie in 2016, where international speakers including the Helen Brown Group and Prospect Research Institute, presented for the first time. She was a member of the founding committee for Apra Australia, Apra's first chapter outside North America. Eresha has also specialised in implementing and enhancing CRM Systems both in her current, and her prior Project Management roles

Priya Kanji

Prospect Research Analyst, The University of Auckland

Priya has been a Prospect Research Analyst at the University of Auckland since 2012 and is interested in raising more awareness and advancing the field of prospect development in New Zealand. In her current role, she has helped establish a prospect management system and has been actively involved in the largest fundraising campaign in New Zealand history. She is an inaugural board member for Apra Australia, the first Apra chapter outside of North America

Reed Foster

Prospect Researcher, Murdoch University

Prior to joining Murdoch University's Advancement Team, Reed previously worked in the defence intelligence industry, conducting open-source research and analysis upon a range of military and security projects for both government and corporate clients. Previously, Reed served as a commissioned officer in the U.S. Army as an infantry platoon commander in both combat and garrison environments and garnered experience in the not-for-profit sector as the Manager for Corporate Development at the Colorado Ballet. Other roles have included temporary posts at the U.S. Department of State and the Charleston Office of Cultural Affairs. Reed holds a Bachelor of Arts in History and Bachelor of Arts in Criminal Justice from The Citadel, as well as a Master of Arts in War Studies from King's College London.

Chris Lang

Prospect Management Coordinator, University of New South Wales

Chris Lang has been the Prospect Management Coordinator at UNSW since February 2018, where he is responsible for portfolio reviews and optimising processes for prospect assignments. He has worked closely with the Development and Alumni & Engagement teams to create a comprehensive Prospect Management Handbook.

Chris previously worked at the Australian Museum from 2008 in Development, Audience Research and Marketing roles where he was responsible for the AM Foundation's database and gift processing; delivering numerous evaluation projects for exhibitions and public programs; and helping to design the Museum's audience engagement and digital strategies. His role at the Museum led to repeated annual growth of fundraising income and to the success of the 200 Treasures campaign, and an exponential increase in its social media audiences.

Conor McCarthy

Consultant, Fundraising Research & Consulting

Conor McCarthy is a Consultant at Fundraising Research & Consulting (FR&C). He previously worked in higher education fundraising at UTS and the University of Sydney. With his colleagues at FR&C, he is co-author of *Understanding Major Donors: A Guide to Prospect Research for Australian Fundraisers* (2018).

Kimberley Payne

Prospect Research Adviser, Monash University

Kimberley commenced with Monash University as a writer in the Media Office prior to moving over to Development in 2006. She has worked within the Prospect Research Team since then, building a quality prospect pool, systems and processes in support of the Monash Change It For Good campaign, which launched officially in 2018. She is particularly interested in policy and procedure development, data visualisation initiatives and promoting the role and importance of prospect research in the fundraising space.

Babette Pearson

Prospect Research Associate, The University of Sydney

Babette Pearson has been with the University of Sydney Alumni & Development team as Prospect Research Associate for six years, throughout the public phase of the University's successful $1 billion INSPIRED campaign. She has extensive experience in research and library roles, including with ACCC, NSW Department of Commerce, Gadens Lawyers, the Australian Museum, ABC, Channel 7, British Council and State Library NSW. An inaugural board member of Apra Australia, Babette holds a BA from the University of Sydney and a post-graduate Diploma of Information Management/Librarianship from the University of NSW.

John Stensholt

Editor – The List, The Australian

John Stensholt joined The Australian in July 2018. He writes about Australia's most successful and wealthy entrepreneurs, and the business of sport. Previously he worked at The Australian Financial Review and BRW, editing the BRW Rich List. He has won Citi Journalism and Australian Sports Commission awards for his corporate and sports business coverage.

Susan van Oorschot

Prospect Research Analyst, The University of Auckland

Susan van Oorschot is a Prospect Research Analyst in the Alumni Relations and Development Office (ARD) at the University of Auckland. Before moving into prospect research, Susan worked as a member of the Advancement Services team at ARD.

Holly Weimer

Associate Director – Prospect Management, The University of Georgia

Holly Weimer received a BBA in Accounting from Georgia College and an MS in Accounting from Kennesaw State. Holly has worked at the University of Georgia since 2008 and has spent the majority of her tenure within the Donor and Alumni Relations division. She started in Gift Accounting, it was soon discovered she has a knack for data analytics and was moved to Report Writing. After a couple years she decided to leave the division to work with the UGA MBA Program as the Corporate Relations Manager, and ultimately she returned to the Donor and Alumni Relations division to work on the Prospect Management team.

Rob Wong

Prospect Research Adviser, Monash University

Rob Wong has only recently entered the Higher Education sector in Prospect Research, coming from a background of Fundraising in the nfp space. He spent 9 years working at disability focussed, CBM Australia, working in the fundraising and communications space. At CBM, Rob was involved in the Fundraising projects and data insights areas before heading for greener pastures at Monash University.