

# Apra Australia 2ND ANNUAL CONFERENCE PROSPECT DEVELOPMENT: BEST PRACTICES IN A GROWING INDUSTRY 2018 AGENDA



MONDAY, 12 NOVEMBER 2018, WESTERN SYDNEY UNIVERSITY, PETER SHERGOLD BUILDING, LEVEL 9

## 8:30AM - 9:00AM REGISTRATION

9:00AM - 9:25AM **WELCOME AND OPENING**  
**Stephen Rowe**, President, Apra Australia and Prospect Research and Briefing Manager, Australian National University and **Deborah Carr**, Executive Director, Advancement, Western Sydney University

## 9:25AM - 10:15AM PROSPECT MANAGEMENT WITH A COLLABORATIVE APPROACH: ADVANCING A CULTURE OF PHILANTHROPY AND DRIVE TOWARDS CAMPAIGN SUCCESS

A broad overview and framework of Prospect Management at the California Institute of Technology (Caltech), which focuses on portfolio parameters that align number of prospects per portfolio, assignment types, campaign priorities and interests.

- Become familiar and gain an understanding of portfolio parameters, the prioritisation of prospects for major giving and strategies to manage unassigned prospects.
- Review a prospect management calendar of events, including the structure and execution of semi-annual portfolio reviews, to ensure the health of portfolios and ongoing portfolio optimisation.
- Learn a calendar of prospect management tasks to keep portfolios right sized and achieve active stage movement.

**SPEAKERS:** **Vanessa Boyle**, Assistant Director of Prospect Management and **Christy Cate**, Executive Director of Advancement Services for Development & Institute Relations, Caltech

## 10:15AM - 10:45AM RESEARCHING DIVERSE COMMUNITIES - IT'S A SMALL, SMALL WORLD?

An overview of the importance of recognising, honouring, and reporting on cultural differences that may impact cultivating

prospects from diverse backgrounds in the Middle East, Asia, and North America.

- Specific examples of how to approach researching diverse, major gift donors who reside in Australia and overseas.
- Best practices in due diligence information management.

**SPEAKERS:** **Deborah Hyland**, Prospect Development Manager, University of NSW and **Dan Hui Wang**, Prospect Research Manager, Monash University

## 10:45 - 11:05AM MORNING TEA

## 11:05AM - 11:55AM WEALTHX - WORLD ULTRA WEALTH REPORT 2018

Key findings of the newly released sixth edition of the World Ultra Wealth Report, which analyses the state of the world's ultra-high net worth (UHNW) population.

- Global trends and insights into the world's UHNW populations based on their asset holdings, gender, industry focus, wealth source, education and hobbies.

**SPEAKER:** **David Awit**, Senior Director, Middle East & Asia Sales, WealthX

## 11:55AM - 12:35PM A CASE STUDY ON THE UNIVERSITY OF MELBOURNE'S RESPONSE TO THE INTRODUCTION OF THE GENERAL DATA PROTECTION REGULATION (GDPR)

What is the GDPR, and why does it apply to universities in Australia? Learn how the University of Melbourne dealt with the introduction of GDPR and why it chose and adopted a path to compliance; a consideration of legitimate interest and holistic approach, rather than bespoke European Union focus.

- Immediate impact of the GDPR on Advancement Operations, including fundraising and prospect research in Australia.
- Key clauses in the GDPR that are important for fundraisers specialising in prospect research, analytics and relationship management.
- The impact of non-compliance, and tips for action, if no action has been taken.

**SPEAKER:** **Linda Goldsmith**, Specialist Trusts Lawyer, University of Melbourne

## 12:35PM - 1:35PM LUNCH

## 1:35PM - 2:05PM ALUMNI PROSPECTING AND ENGAGEMENT

Griffith University's approach to identifying alumni as prospects for greater engagement and philanthropic giving, utilising specific cohort groups, including data from FR&C's Wealthscan, LiveAlumni, prior scholarship recipients, and alumni survey respondents.

- A specific and methodological approach to segmenting alumni data and engaging with alumni prospects, and the different sources of alumni prospects within universities and the potential for uncovering individuals and increased major gifts.

**SPEAKER:** **Bridget French**, Senior Officer - Development, Griffith University

## 2:05PM - 2:20PM NEWS & ALERTS

An overview of the importance of news and alerts relevant to development and alumni communications at the University of Sydney, helping to achieve fundraising, engagement and training goals.

- Effective search tools for tracking news and alerts, and best practices in communicating key news updates.

**SPEAKER:** **Babette Pearson**, Prospect Research Associate, University of Sydney

## 2:20PM - 2:50PM ROUNDTABLE DISCUSSIONS

## 2:50PM - 3:10PM AFTERNOON TEA

## 3:10PM - 3:25PM WHO ARE WE? SECTOR SURVEY RESULTS

Insights of the annual survey of prospect development professionals in Australasia.

- Points of interest in the current landscape of prospect development professionals in Australasia.
- Apparent trends in survey data since 2015.

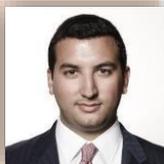
**SPEAKER:** **Stephen Rowe**, President, Apra Australia and Prospect Research and Briefing Manager, Australian National University

## SOCIAL EVENT



**NETWORKING DINNER & DRINKS**  
**SUNDAY, 11 NOV**  
Commercial Hotel,  
7PM  
2 Hassall Street  
Parramatta

## SPEAKERS



**David Awit** is Senior Director for Asia, Middle East and Africa at Wealth-X, the global authority on the ultra-wealthy, where he is responsible for growing the business' presence in the luxury, financial services, education and not-for-profit sectors, and managing client relationships in these regions. Wealth-X provides UHNW insights and strategy solutions to its members, so that they can identify, develop and enhance relationships with ultra-affluent individuals. Wealth-X has the world's largest collection of curated research and intelligence on wealthy individuals, compiled by highly trained researchers across five continents, speaking over 35 languages. Prior to joining Wealth-X, David worked with Nouriel Roubini, the world-renowned macroeconomist, managing his UHNW, Family Office, Sovereign Wealth Fund, Private Equity, Hedge Fund and Corporate client relationships, and organising speaking engagements in France, Switzerland and the Middle East. Prior to that he was at an advisory firm working primarily with Private Equity firms and Hedge Funds, assisting them with industry due-diligence in the TMT and Energy & Industrials sectors. He is a graduate of the University of Exeter's Institute of Arab and Islamic Studies, having studied Middle East Studies with Arabic. He is based in the UAE.



**Vanessa Boyle** has nearly ten years of experience working in advancement services. She currently serves as the Assistant Director of Prospect Management at the California Institute of Technology (Caltech). Vanessa began her career in prospect research at the University of Texas at Dallas from 2008 - 2010 and joined Caltech in 2010, working in prospect research. From 2012 - 2014, she held the position of Advancement Information Trainer, where she founded the training program that includes instructor-led and hands-on training for the growing Development and Institute Relations office. She served as the Customer Resource Center Supervisor for the San Diego County Office of Education from 2014 - 2016, where she oversaw a training and help desk staff during a countywide database implementation project to Oracle PeopleSoft. Vanessa was back with Caltech in 2016 in her current role in prospect management and thoroughly enjoys working with frontline fundraisers, streamlining processes and building a sustainable program. She earned her BA in History from California State University, Long Beach and her Masters in Library and Information Science from San Jose State University.



**Christy Cates** is currently the Executive Director of Advancement Services for Development & Institute Relations at the California Institute of Technology (Caltech). Christy plays a central role in furthering the organization's vision of building a world class advancement organization by establishing and refining a comprehensive programs that integrate into all facets of the organization. Her areas of focus include talent acquisition and on-boarding, professional development, staff engagement and retention, prospect research, prospect management, performance management. Prior to joining Caltech, Christy served as the Senior Executive Director of University Advancement Human Resources at UC Irvine. Before entering the world of higher education advancement, Christy held human resources positions with In-N-Out Burgers and Pick Up Stix, Inc., both privately held, multi-site corporations that employed between 800-4,000 employees. She earned a degree in political science from San Diego State University and is a member of SHRM and CASE

### 3:25PM - 3:40PM HOW TO USE PREDICTIVE ANALYTICS MODELS AND RANKINGS TO INFORM DATA DRIVEN DECISION-MAKING

Sydney Theatre Company (STC), like many arts and cultural organisations, is increasingly relying on private giving to meet the expectations of industry, audiences, and stakeholders.

- Use predictive analytics models and rankings to inform data driven decision-making, day-to-day prospecting, and moves management.
- Rankings are just one piece of a big puzzle; how to figure out where they fit.

**SPEAKER: Joshua Forward**, Annual Giving & Analytics Manager, Sydney Theatre Company

### 3:40PM - 3:55PM CREATING AN INTERACTIVE CAMPAIGN GIFT TABLE BASED ON YOUR PROSPECT LIST

An overview of the why and how to create a campaign gifts table using prospect data available in your database.

- Develop and report on a campaign gifts table, and benefit from tips and guides on best practices in developing and maintaining a gifts table.

**SPEAKERS: Rehmana Khan**, Senior Manager Information & Analytics and **Aiman Jajo**, Manager Analytics, University of NSW

### 3:55PM - 4:10PM A GUIDE TO LIFE AFTER DEATH

A brief talk on the value of checking death notices and obituaries.

- How death notices can connect families, and how to discover new opportunities using obituaries.

**SPEAKER: Tim Grime**, Prospect Intelligence Analyst, The University of Western Australia

### 4:10PM - 4:50PM HOW FUNDRAISERS REALLY USE PROSPECT RESEARCH, AND EVIDENCE OF THE VALUE OF PROSPECT RESEARCH

Case studies of how fundraisers use prospect research in major gifts, campaigns and corporate partnerships, in the cultivation and solicitation stages of the donor development cycle.

- What evidence shows the association between investment in prospect research, and major gifts performance?
- Tactical applications, particularly in donor meetings and planning the goals for top donor relationships.

**SPEAKER: Roewen Wishart**, Director of Xponential Strategy, Xponential Philanthropy

### 4:50PM - 5:00PM CLOSE & THANK YOU





**Bridget French**, as the first and sole Prospect Researcher at Griffith University, implemented the Development and Alumni team's initial prospect management strategy and procedure in 2017. In alignment with the University's overall fundraising strategy, she established fundamental processes, prospect profile templates, and prospect database administration and key measures of success. She is responsible for timely and accurate prospect research to reveal donor interests, capacity and potential linkages to the University, and providing high-level support to the Executive Group and Fundraising Managers. Since her commencing in the role in mid-2017, Bridget has uncovered numerous major prospects for philanthropic support and other activities. Part of her focus recently has been on prospecting a series of Alumni cohorts for the University, to build and manage a pipeline of key connections for valuable engagement. Prior to being a Prospect Researcher, Bridget was a Fundraising Manager at Griffith University, overseeing the Sciences Portfolio where she grew the group's fundraising income significantly year-on-year. She has also held fundraising roles with Australia Zoo Wildlife Warriors and the Queensland Performing Arts Centre, and a variety of marketing and events positions in Australia and London.



**Joshua Forward** works in the Philanthropy team at Sydney Theatre Company as the Annual Giving & Analytics Manager, focusing on campaigns, one to many communications, and how the team can use data to best inform their fundraising practice. He is particularly interested in the ways departments can synchronise their data to drive strategy and gain constituent insights. Previously Josh worked for Sydney Dance Company first in their development team, and then as CRM Manager after transitioning the company to Tessitura.



**Tim Grime**, began his career auditing Census data with the ABS, followed by a stint in the insurance industry before almost 20 years in the media industry at The Newspaper Society (UK), News Corp, Community Newspapers and Sensis as database manager, media analyst, advertising strategist, media and market researcher, and marketing manager. Tim joined UWA in May 2016, experiencing the final 18 months of the successful New Century Campaign and is now enjoying the mania of gearing up for 'the next big thing'. In his personal life, Tim is a wrangler of four high school kids, but occasionally escapes to enjoy live music and pursue his passion for nature photography.



**Linda Goldsmith** is the Specialist Trusts Lawyer at the University of Melbourne. Linda's role encompasses the negotiation, drafting and provision of tax, regulatory and legislative advice for all philanthropic gifts, donations and grants to the University. Linda has comprehensive knowledge of the community sector and community development strategies with proven success ensuring strong engagement and opportunities for input during participation in various Board roles. Linda is a confident and articulate communicator with broad general management and leadership skills, and substantial experience guiding, leading, training, coaching, and mentoring professional teams to achieve business objectives. Linda is an elected Executive Director, Board Member, and Chairman in the not-for-profit sector (Education, philanthropic and sporting organisations) with strong business acumen and the capacity to ensure legislative, regulatory and organisational policy compliance



**Deborah Hyland** currently serves as Prospect Development Manager at UNSW. She previously led the prospect development team at the University of Queensland and was a prospect research analyst at the University of Sydney during the University's Inspired Campaign. She has also staffed numerous successful philanthropic campaigns in the USA at the University of California at Berkeley, University of Virginia, Smithsonian Institution, and the American Red Cross. An active member of the Association of Professional Researchers for Advancement since 1998, Deborah serves on the board of Apra Australia, and was formerly on the boards of both APRA Virginia and APRA-METRO DC. She is originally from Washington, DC, and graduated from Sarah Lawrence College in New York. Deborah has lived in Australia since January 2015 where she's enjoyed experiencing the vibrant city life of Sydney and the beautiful coastal landscapes of Queensland.



**Aiman Jajo** is currently managing the Analytics team at UNSW. He started his career as a PhD student in bioinformatics and transcriptomics at Western Sydney University and University of Padova. After working in bioinformatics as a postdoctoral research fellow for six years with the University of Padova, he joined the University of Sydney's Division of Alumni and Development (DAD) in 2014. Since then Aiman worked on predictive modelling and reporting within DAD, where he helped the team exponentially expand their analytics program. In 2018 he joined the Philanthropy Division at UNSW, where he has been involved in deep analytics and forecasting. He is currently applying his skills in forecasting to make sense of Alumni and Donor behaviour within UNSW. Aiman's analytical interests revolve around predictive modelling and forecasting. But his true passions are deeply seeded in cluster analyses, principal component analyses and in investigating correlation behaviour between multiple variables at a time.

**SPEAKERS**



**Rehmana Khan** is a Senior Manager Information & Analytics at UNSW Philanthropy where she leads the Database, Reporting & Analytics and Data Quality teams. Rehmana is skilled in building and optimising organisational processes; creating measurement systems and metrics including infrastructure to maximize business performance. Prior to UNSW, Rehmana served as Manager Advancement Services at UTS and successfully managed UTS's university-wide CRM for Advancement for seven years. With more than 8 years' experience working across Philanthropy in Higher Education; Rehmana's experience spans various technology solutions including Database Management, Analytics & Reporting, Website Development, Digital Marketing and Project management. Rehmana holds an MBA in Marketing from the Australian Institute of Business. Rehmana has been a speaker at Blackbaud's BBCon conference and Universities Australia Marketing Communications & Development (UAMCD) conference.



**Babette Pearson** has been with the University of Sydney Alumni & Development team as Prospect Research Associate for five years working on the INSPIRED campaign. She has over 20 years' 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.



**Stephen Rowe** has worked in prospect development for just over 10 years now, starting 'across the ditch' at the University of Auckland, in 2007, before making the big move to the University of Sydney in 2011, and then the small move to the nation's capital Canberra in 2012 at the Australian National University. Stephen is particularly interested in furthering the profession of prospect development and always enjoys the success of his fundraising colleagues. Stephen ended up as the first President of Apra Australia in 2018, which his degree in Human Geography from Victoria University of Wellington probably didn't prepare him for.



**Dan Hui Wang** is the Prospect Research Manager at Monash University. Previously she worked at the University of Sydney on its record breaking 'Inspired' Campaign. At Monash Dan Hui leads the prospect research team; tasked with identifying potential donors to the University and helping fundraisers to gain a nuanced understanding of our stakeholders and communities. Her team has fundamentally changed the University's fundraising practice from a reactive team to a highly targeted and strategic function with capacity to realise ever greater philanthropic gifts. A fluent Mandarin speaker, Dan Hui holds a BA in International Relations from the State University of New York.



**Roewen Wishart CFRE** is a leading authority on high-return fundraising strategies to benefit for-purpose organisations, particularly major gifts, capital campaigns and gifts in wills. With over 25 years' experience, he brings deep analysis to overall development and review of fundraising strategy. He is Director of Xponential Strategy, and creator of the Australian Major Gifts Benchmarking Study.



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