

NEWSLETTER

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Check out [Apra International's Connections](#) online journal - catch up with recent [Features](#) as well as [Innovation](#), [In the Field](#), [Statistical Significance](#) and [Thought Leaders](#).

Editor's Welcome

Spring 2021 already?!

The August VINO session was a great way to connect with colleagues new and old. Our annual conference is on the horizon and if you have something to share, get in touch with the Conference Committee.

In this edition, you will find a list of handy references, which is in no way exhaustive, however, if there are resources not listed you'd like to share, please let us know.

Lastly, we have a wonderful profile of Mark Mahoney, *Development Research & Information Manager* at the Art Gallery of NSW, sharing with us his experience and what motivates him.

Tim Grime
Editor

Useful Resources

Here are some useful free resources that will make your research work just that little bit easier. Firstly, your local, state or university library will have sources you can access. Both National Libraries of [Australia](#) and [New Zealand](#) have many resources.

Other useful online resources include:

Australia and New Zealand Free Public Records

Search the original Australia and New Zealand public records resource for birth records, marriage records, deaths, burials, court records, companies, corporations, trademarks, judgments, and much more.

- Australia: [Free public records](#)
- New Zealand: [Free public records](#)

Australasian Legal Information Institute

Australia's and New Zealand's online free-access resource for legal materials, providing access to public legal information -- that is, primary legal materials (legislation, treaties and decisions of courts and tribunals); and secondary legal materials created by public bodies for purposes of public access (law reform and royal commission reports for example) and a substantial collection of law journals.

- Australia: [Legal Information Institute](#)
- New Zealand: [Legal Information Institute](#)

Honours and awards

Honours lists and recipients of regular Queen's Birthday and New Year/Australia Day Honours Lists, and a number of special lists which are published as required.

- Australia: [It's An Honour](#)
- New Zealand: [Honours lists and recipients](#)

Property valuation

- Australia: [On The House](#); [Domain](#); [Real Estate](#); [Australian Rural](#)
- New Zealand: [QV](#); [Homes](#)

Know of other useful free online resources? Share them info@apraaustralia.org.au

Diary Dates:

- **9-10 Nov Apra Australia 2021 Conference** - Our annual conference held over two half days

>> Do you have a presentation you'd like to share? Get in touch with the Apra Australia conference committee Chair, [Belinda Clark](#).

- **2 Nov (USA) Apra University - Building Community: A Culture of DEI in the Workplace:**
- **9 Nov (USA) Apra University - Building a High Performing Team in the New Normal**
- **16 Nov (USA) - Apra University - Data Privacy and Ethics**
- **Bundle offer: Apra University Webinar Bundle**
- **Prospect Development 2021 Session Recordings** - Session bundles from #PD2021, available for purchase at [Apra University](#).
- **6 / 13 / 20 / 27 Oct (USA) Apra Carolinas 2021 Virtual Fall Conference** - Four Sessions over four weeks

Any dates you'd like to share - let us know!

Meet one of our members:

Mark Mahoney

What is your current role?

Development Research & Information Manager at the Art Gallery of NSW



And what is your key objective in this role?

Everything from identifying and qualifying potential major gift donors to researching and profiling major gift prospects and influential figures within the arts community both within Australia, and internationally. Relationship mapping and portfolio development to providing strategic direction to major gift officers, executive

staff, Trustees and Board/Committee members. The creation and maintenance of a major gift pipeline for Gallery donors and prospects, and management of advancement services staff

What attracted you to Prospect Research?

I actually stumbled into Prospect Research by accident. I was a librarian before I worked in Development, and a perfectly happy one at that. Around 2013 I was looking for library roles with more of a research focus, when I saw a job advertised on the Australian Library Association's jobs page, posted by the University of Sydney, looking for an Information Management Officer (incorporating "Advancement Services" and "Prospect Research") within the "Development Division".

I had absolutely no idea what any of those terms meant, but I am a USYD graduate and have a soft spot for the place – I'd always wanted to work there and thought that I might be able to work my way up to a role in the Library if I impressed whoever these "Development" people were. So I applied for the role, and got it.

Within two weeks of starting I did some supporting research on a prospect who, shortly afterwards, made a \$10 million pledge to the University. I was hooked.

Ultimately, that's what I love about Development, and particularly major gifts work – the sheer thrill of the chase; the desperate hunt for information that might unlock a prospect's full potential, the preparing of fundraisers as they develop the prospect, the nerves as the ask approaches, and the adrenaline rush when the big one comes in. It's a great thrill.

What keeps me attracted to Prospect Research is the impact it can have on the identification, cultivation and successful solicitation of major prospects – the potential to have a positive influence on the process in the really exciting gifts that change things for your organisation.

Years ago I heard a speech from Bruce Flessner, then Principal of Bentz Whaley Flessner, where he said something like, "All the hundreds of millions of dollars that are spent by Development offices around the world every year are spent to move the intentions of major donors by one inch". That's what Prospect Research can do, and that's what keeps me attracted to it.

Years of experience in Prospect Research/Development

Eight and half years. Prior to that I spent six years in public and academic libraries - good preparation for prospect research

If you have had other roles in NFP/HE/Arts could you provide a brief overview of those roles and years of experience? And any highlights you'd like to share from any of these roles?

Prior to my role at the Art Gallery of NSW I spent 2.5 years as an Information Management Officer, and later Prospect Research Associate, at USYD, working on the \$1 billion Inspired! fundraising campaign.

At USYD I was involved with some of the largest philanthropic donations in Australia at the time, including the Wakil Foundation's \$10.8 million gift to the Sydney Nursing School, and the Lambert family's \$33.7 million gift to fund long-term research into the medicinal potential of the cannabis plant.

Led by Tim Dolan and current Vice-Principal of Advancement Rosalind Ogilvie, the USYD's Development Office was the best possible place to learn how a major development office works. The entire Division was filled with industry-leading specialists across every area of Development, and you got to observe what they did, and how each of their roles fit into the Division as a whole. I learned what constitutes "best-practice" in Development, what you need to make a campaign work, and how to think strategically. Everything I have done in my Development career flows from what I learned at USYD.

Any insights you could share on your experience in the Arts sector? Key differences in the way you approach the work for the Arts vs HE?

I find the main difference between Higher Education and pretty much everything else, including the Arts, is the quantity and quality of data that you hold internally on key prospects, that can be used as a research tool.

University Development offices tend to hold large volumes of well-organised, retrievable data on every aspect of a donor or prospect, that can be used to build models, identify prospects, assemble portfolios, etc. They tend to have dedicated staff who manage data and ensure data integrity, and they have the budgets to support this. They tend to have actively-managed organisational KPI's around CRM usage and the proper filing of pertinent information, to ensure good data. This allows truly "data-driven" research.

Smaller charities, including the Arts (and even large arts organisations) rarely, if ever, have this. There is no reasonable pretext to collect and store the kinds of data that a University would hold on its alumni. Information lives in silos and where it is entered into a system this is often done inconsistently, limiting its usage value. Staffing budgets are smaller, and staff are often so busy with their operational duties that they do not contribute to the collection and management of good data.

As such, there is very little scope for data-driven research. There is no "Let me just pull a data-set for you". Almost everything is bespoke, and if you want a Development data framework - even something as simple as a formal cultivation pipeline - expect to create and implement it yourself.

The other key difference is that Arts giving is very often relationship-driven, and much more transactional than in Higher Ed.

Major Arts patrons are a pretty small cohort, and they almost always know each other to some extent. In the Arts, and with any smaller charity, you need to activate your board members and other key advocates much more, and as a Prospect Researcher you need to work with them the way you would with any other fundraiser. Relationship-mapping is far more important in the Arts, as is remembering that sometimes the Holy Grail of Higher Ed research – "What do they really care about?" – is not the most important thing. With a smaller charity with an active

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board, your focus definitely changes from “Who really wants to cure cancer?” to “Who really owes my Board Member a few favours”. It’s much more mercenary, in that sense .

What inspires you in your role/at your current organisation?

The ambition of the Gallery’s fundraising, led by Director of Development John Richardson, is what I find most inspiring, and what motivated me to come to the Gallery.

Very few arts organisations in Australia had previously attempted to operate on a permanent major gifts footing, such as you see in Higher Ed., where the expectation of asks should regularly be in the 7-figures, that you should be bringing in tens of millions of dollars per year, and that fundraising should be approached pro-actively and strategically. It was clear from my first meeting with the Gallery’s Development team that their goal was to move beyond what was at that time viewed as the “typical” arts fundraising model, where 6 and 7-figure gifts were rare, fundraising was often peer-to-peer only, and where benefaction was seen as a donor’s decision purely, rather than a process that Development staff could influence meaningfully.

It’s been a real privilege to be part of project that has shown that an arts organisation can raise funds at the level of a University, and with the same level of professionalism and strategy-driven Development that you would find in the Higher Education sector.

What is your favourite or valued resource, and why?

Factiva. There is no substitute for close reading when researching a major prospect, throughout the cultivation cycle, and particularly in the lead-up to a major ask; and I like to read as much as possible, to develop as full a sense as possible of the prospect – their professional and personal interests, recurring themes in their public statements, liquidity events and how they may have responded to these, etc.

You never know when some throwaway line a prospect gave in an interview five years ago is going to jump out and when combined with other research sources reveal something leverageable or important that could be key to their philanthropy.

Factiva allows me to get a sense of a prospect’s public profile over years, sometimes decades, which I find invaluable in developing a sense of how best to advise fundraisers in formulating their cultivation strategies for their key prospects

Tell us something not many people know about you.

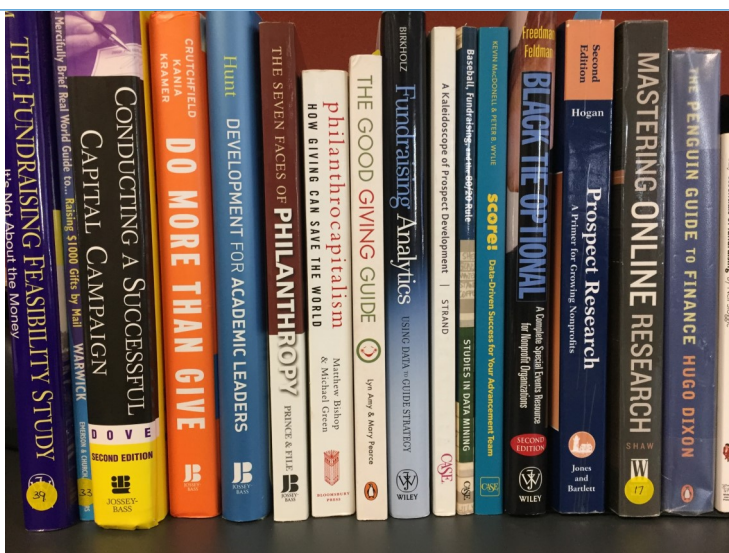
I’m a jazz obsessive. Not many people know that about me, but the people who do definitely know are the poor colleagues who have been unfortunate enough to have to sit near me over the years, and be constantly annoyed by my foot-tapping, tune-humming and air-piano playing while working. Can I take this opportunity to apologise unreservedly to colleagues past and almost-certainly future for the noise and inconvenience caused – though, in my defence, I have at least spared you my dancing.

What are your ‘go-to’ books?

There are a plethora of useful reference texts. What are your ‘go-to’ books? Some of the key books in prospect research are typically:

- **Prospect Research: A Primer for Growing Nonprofits** by Celia Hogan;
- **Prospect Research for Fundraisers: The Essential Handbook** by Jennifer J. Filla and Helen E. Brown;
- **Fundraising Analytics: Using Data to Guide Strategy** by Joshua M. Birkholz; and
- **Understanding Major Donors - A Guide to Prospect Research for Australian Fundraisers** by Charlotte Grimshaw, Molly Masiello and Conor McCarthy.

What book or books do you keep handy by your side? Is there one you’d like to share with a review for our members to read? info@apraustralia.org.au



 **Lauren Woodring** @laurenwoodring · Sep 14

Every year I wonder if the Prospect Researcher for The Met has to do event bios for the Gala. As much as event bios are annoying, that could be fascinating. [#prospectresearch](#)

4 replies · 4 retweets · 26 likes

 **Henry Sotheran Ltd** @Sotherans · Sep 15

all I want is a mysterious stranger to bequeath their gigantic, shadowy library to me so I can spend the rest of my life deciphering its mysteries is that too much to ask

21 replies · 331 retweets · 1.7K likes

What caught the editor’s eye


Just for laughs: shared on Apra Exchange were a list of movie titles that describe our work. To add an Australian - New Zealand flavour, here are some local movie titles that might describe your work - have you any to add?

- Somersault
- Mystery Road
- What We Do in the Shadows
- Money Movers

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Contributors: Mark Mahoney (Art Gallery of NSW) for his profile (Thank you!); Apra Australia Board: Stephen Rowe, Priya Kanji, Molly Masiello, Rhia Sagers, Victoria Coyne, Tim Grime

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