

### **The framework and broad overview of Prospect Management at Caltech with a collaborative approach that advances a culture of philanthropy and drive toward campaign success**

*Vanessa Boyle, Assistant Director of Prospect Management, California Institute of Technology (Caltech)*

This presentation will provide the framework and broad overview of Prospect Management at Caltech, with a collaborative approach that advances a culture of philanthropy and drive toward campaign success. The focus will emphasise portfolio parameters that align number of prospects per portfolio, assignment types, campaign priorities and interests. The presentation will 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.

- Attendees will become familiar and gain an understanding of portfolio parameters, the prioritisation of prospects for major giving and strategies to manage unassigned prospects, and learn a calendar of prospect management tasks to keep portfolios right sized and achieve active stage movement.

### **A case study on the University of Melbourne's response to the introduction of the General Data Protection Regulation (GDPR)**

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

What is the GDPR, and why it applies to Universities in Australia? Key clauses in the GDPR that are important for fundraisers specialising in prospect research, analytics and relationship management. The impact of the GDPR specifically on fundraising and prospect research. How the GDPR may affect alumni relations at the University. How the University of Melbourne has dealt with the introduction of GDPR and why it chose that approach – a consideration of legitimate interest and adopting a holistic approach rather than bespoke European Union focus. The impact of non-compliance, and tips for action, if no action has been taken.

- Attendees will learn of the immediate impact of the GDPR on Advancement Operations in Australia, and how the University of Melbourne dealt with the introduction of GDPR and adopted a path to compliance.

### **Researching diverse communities - It's a small, small world?**

*Dan Hui Wang, Prospect Research Manager, Monash University and Deborah Hyland, Prospect Development Manager, UNSW*

An overview of the importance of recognising, honouring, and reporting on cultural differences that may impact cultivating prospects in the Middle East, Asia, and North America. Will look at examples of prospects from these cultures who reside in Australia and overseas, and explore ethical approaches to supporting a fundraising cultivation strategy. Finally, we will define best practices in appropriately capturing this information in your CRM – including a definition of a due diligence profile.

- Attendees will hear specific examples of how to approach researching diverse, major gift donors who reside in Australia and overseas, learn best practices in due diligence information management.

### **A guide to life after death**

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

A brief talk on the value of checking death notices and obituaries - these are not just for ensuring that those recently passed are no longer contacted with communications from your office – which can cause emotional distress for the deceased's family – but also how death notices and obituaries open up opportunities to add further information to your database or CRM.

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

### **Creating an interactive campaign gift table based on your prospect list**

*Rehmana Khan, Senior Manager Information & Analytics, and Aiman Jajo, Manager Analytics, UNSW*

An overview of the why and how to create a campaign gifts table using prospect data available in your database. Specific examples will be provided of how UNSW created a campaign gifts table based on the prospect data available in the Raisers' Edge, and used Tableau reporting tool for interactive display and real time reporting.

- Attendees will hear specific examples of how to develop and report on a campaign gifts table, and will benefit from tips and guides on best practices in developing and maintaining a gifts table.

### **How fundraisers really use prospect research, and evidence of the value prospect research adds**

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

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. Examples will be drawn from the medical research, health, and conservation sectors. The case examples will show information found via research, and the inferences drawn then actions planned by fundraisers with donor prospects. The use of research to choose: questions for donors in the early cultivation stage, options for specific funding needs to introduce to donors, selection of a gift ask amount and influencer in the solicitation stage.

Separately, the presentation will also share selected data from the new *2018 Australian Major Gifts Benchmarking Study* about the levels of prospect research staffing in Australian charities, and available statistical associations between use of prospect research and major gifts performance.

- Attendees will learn how relationship management fundraising staff use research information for tactical applications, particularly in donor meetings and planning the goals for top donor relationships, along with what evidence shows of the association between investment in prospect research, and major gifts performance.

### **Alumni prospecting and engagement**

*Bridget French, Senior Officer – Development, Griffith University*

This presentation will outline Griffith University's approach to identifying alumni as prospects for greater engagement and philanthropic giving. Utilising a number of specific university alumni prospect cohort groups, including data from FR&C's Wealthscan, LiveAlumni's, prior scholarship recipients, and alumni survey respondents

The university plans specific approaches and engagement strategies to carefully steward and cultivate prospects based on their alumni status with the University. The entire alumni database can seem too large and overwhelming, but breaking it down into precise groupings with known potential is a valuable approach. Often Development / Fundraising Managers in Universities do not have the time for this data mining. Griffith University has pinpointed a number of key prospects, PAF directors and family members of high-profile philanthropists through this exercise. These are valuable alumni not only for fundraising purposes, but also for mentoring, guest lecture opportunities, event hosts and future student recruitment. A detailed process for recording prospect identification, research, contact and allocation has been implemented through Raiser's Edge.

- Attendees will learn 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.

### **How to use predictive analytics models and rankings to inform data driven decision-making**

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

Sydney Theatre Company (STC), like many arts and cultural organisations, is increasingly relying on private giving to meet the expectations of our industry, audiences, and stakeholders. STC undertook a project with Bentz Whaley Flessner to integrate predictive analytics models into their database system Tessitura to identify prospects. This presentation will cover the installation process and how they are being used day-to-day in our prospecting, and moves management.

- Attendees will learn how to use predictive analytics models and rankings to inform data driven decision-making, and how rankings are just one piece of a big puzzle, and how to figure out where they fit.

### **News & Alerts**

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

An overview of the importance of news and alerts relevant to development and alumni communications at the University of Sydney. Through the example of an internal daily news service implemented by Prospect Research at the University of Sydney, participants will learn how to implement a news and alerts service in their organisation to help achieve their fundraising, engagement and training goals.

- Attendees will hear examples of how to develop effective search tools to track news & alerts, and learn best practices in communicating key news updates to their fundraising teams.

### **Who are we? Sector survey results**

*Stephen Rowe, Prospect Research & Briefing Manager, ANU and President, Apra Australia*

A brief presentation on the annual survey of prospect development professionals in Australasia, including analysis of trends in the survey since 2015.

- Attendees will discover points of interest in the current landscape of prospect development professionals in Australasia, and what trends are apparent in survey data since 2015.

### **WealthX - World Ultra Wealth Report (2018)**

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

David Awit of Wealth-X will be presenting 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.

- Attendees will learn about global trends and insights into the world's UHNW populations based on their asset holdings, gender, industry focus, wealth source, education and hobbies, and discover how Wealth-X products and resources can add value to their organisations.

### **Round-table Discussions**

There will also be a round-table session, providing attendees to break into smaller groups, and discuss issues/topics relevant to our profession. The topic/s will be made available on the day of the conference.