Australia Chapter

2022 Annual Conference

University of Sydney

PROGRAM

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SESSION OVERVIEWS

Financials in Philanthropy

Jason Briggs & Jonathan Jeffery, Co-founders, Pyrotalks CIC

This session will collate some of the key challenges research teams face when analysing director remuneration and private businesses and how to overcome them. It will then show how to use this knowledge to inform ask planning strategies.

The Psychology of Giving

Amy Begg, Executive Director of Pipeline Optimisation, Emory University, USA

High income earners often have similar assets to those in finance who are typically compensated through a bonus structure. The ways in which they earn their income impacts how they think about their money and ultimately their philanthropy.
This session will explore the psychology of this and strategies we might employ toward these industries.

The Search for Impact How do we know?

Stephen Rowe, Prospect Research & Briefing Manager, ANU

How do we make sure our colleagues don't say 'they're nice, but couldn't we really do with another fundraiser'? So, how do we know we are successful?
In this presentation Stephen will *NOT* fully answer these questions, but will reflect on efforts in the last few years to advocate for prospect development at ANU, including the first team 'Insights' report. Reflections will include what worked, what didn't, what could be changed in the future and even...whether it was all worth it!

Ramping Up Reach Outs: A Case Study In Cold Prospecting

Steven Bärwald, Associate Director, Prospect Development, University of Sydney

Preparing for a call day or asking fundraisers to do cold calling can be daunting and it can be challenging as prospect researchers to know where to start. How do you know this is a good use time for all involved? And how can we increase the odds for success?
In this session, Steven will share how his team were able to use available data to provide fundraisers with just enough information to pick up the phone and make participation as straightforward as possible. The session will also demonstrate how their approach led to an increase in calls and securing meetings.

The Corporate Support Report

John McLeod, Senior Research Consultant, Philanthropy Service & Family Advisory, JB Were

The relationship between the corporate and for-purpose sectors has evolved significantly in recent decades and continues to do so at an even greater rate. The recent publication of The Corporate Support Report examined this mostly misunderstood field.
In this session, John, the report's author, will explain why this relationship is so different to other fundraising and philanthropy areas and what approaches are needed to grasp the sizeable opportunities available.

Interactive Session Due Diligence

Facilitated by Victoria Coyne, Apra Australia Ordinary Board Member

Due diligence research is always a hot topic for prospect researchers. In small groups, we will share our knowledge of due diligence resources and processes, and discuss how we would approach several prospect scenarios. No matter the size of your team or budget, there will be some great tips, ideas and learnings to take away.

Clues For a Super Sleuth: The Data Ins and Outs For Successful and Innovative Prospect Researching

Julia Villiotis, Director, Visualise Fundraising

This session will look at how you can tell the prospect research story with data, leveraging your system to capture and report your impact. Julia will provide tips on working with your data specialist to get the most out of your prospect pool as well as how to identify information already at your fingertips that can improve and enhance your prospecting processes.

Bonus Content: Introducing the RiF Handbook for Prospect Research

Chris Davis, Chair, Researchers in Fundraising

Recording available via Zoom. Visit tinyurl.com/apraaus to watch and enter passcode: ^TC^yw%5
This session provides an overview of the RiF Handbook, a resource instigated by Researchers In Fundraising in the UK and being developed by an international cohort of volunteers to provide a comprehensive, up-to-date and relevant guide to the diverse range of skills and knowledge required for successful, professional and ethical prospect research.
In this session, Chris highlights some of the content, including chapters on capacity ratings and due diligence, highlighting the relevance of the resource to prospect researchers no matter where you are in the world.

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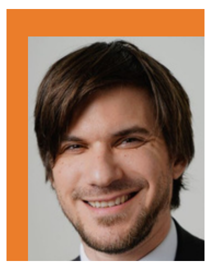
PRESENTERS



Jason Briggs, Co-founder, Pyrotalks CIC

Jason is Co-Founder of PyroTalks CIC, as well as Consulting Partner for BWF Europe. and Fellow for Halpin Partnership. Based in the UK, Jason was previously Director of Development at Cavendish Cancer Care leading on all income channels.

Jason also previously headed up the fundraising research & insight function at The University of Sheffield, raising the value of their prospect pool from £4.2m to £62.5m, and sat on the senate's academic Research Ethics Committee. He also worked as a Consultant at Graham-Pelton specialising on campaign planning.

Jason is an active committee member for the Institute of Fundraising Researchers in Fundraising Committee, and is founding Trustee for Land of Joy, which raised £1.2m to establish a Tibetan retreat centre. He also serves as a Trustee for the Foundation for Developing Compassion & Wisdom.

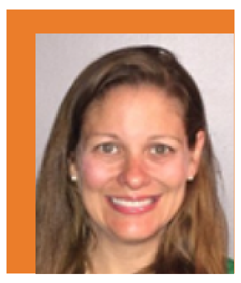
Jason was awarded an Insight in Fundraising Award 2016 for his work on international philanthropy, and CASE Europe Iain More Award 2017 'for emerging development professional'. He holds a First Class degree in History & Philosophy and a Diploma in Fundraising Management.

Jonathan Jeffery, Co-founder, Pyrotalks CIC

Jonathan is Co-founder of PyroTalks and currently the Associate Dean of Education at The University of Sheffield Management School. He lectures in company analysis and valuation, risk and financial derivatives, teaching at both Undergraduate and Postgraduate level.

Jonathan has also taught at some of the leading European Business schools, and was a visiting professor at EDHEC University between 2013-2019.

Prior to joining the University Jonathan worked as a senior investment analyst at a leading wealth management firm. He also holds a number of professional qualifications and has recently been made an Honorary FCT by the Association of Corporate Treasurers for his work in Treasury education and consultancy. He is also a director at Incontango Training which sees him undertake a wide range of consultancy and training across the finance spectrum, with a focus on Treasury and risk in large multinationals.



Amy Begg, Executive Director of Pipeline Optimisation, Emory University, USA

Amy is Executive Director of Pipeline Optimization at Emory University where she is responsible for developing robust pipelines, optimizing fundraiser portfolios, and oversees the Research and Prospect Management teams. For the last 18 years, Amy has held leadership positions on the research and prospect management team at Harvard University. In 2016, Amy created the first prospect management team for the Faculty of Arts and Sciences. She has also provided guidance on prospect management for the University Development Office, the Radcliffe Institute, the Harvard Kennedy School of Government, the Harvard Graduate School of Education and the Harvard Divinity School. Amy is also co-founder and partner of Cypriped LLC., a cryptocurrency mining company.

Amy serves as a trustee for the University System of New Hampshire (USNH), which includes all of the public colleges and universities in the State of New Hampshire. She is a past president and board member of the New England Development Research Association (NEDRA). Previously, she served as a board member for the Plymouth State Alumni Association, including a term as chair of the association.

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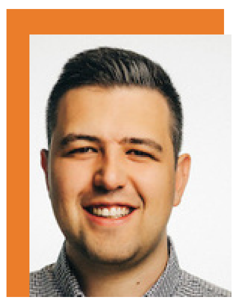
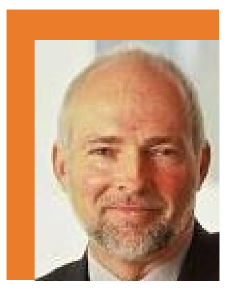
Stephen Rowe, Prospect Research & Briefing Manager, Australian National University

Stephen has managed prospect development at the Australian National University since 2012 and was formerly based in Sydney and Auckland, commencing in the field in 2007.
Stephen's involvement with the wider prospect development community began in 2014 when Australian National University hosted the first Australian Prospect Research Forum. He went on to help found Apra Australia and was President from 2018 to 2021. Lately his interests are in assessing team impact, resourcing for campaigns, and assessing 'leaky' prospect pipelines.



Steven Bärwald, Associate Director, Prospect Development, University of Sydney

Steven is the Associate Director, Prospect Development at the University of Sydney. He has over 10 years of management experience and has worked across sales research and operations, e-commerce, market research, HR tech and now higher education philanthropy. He is also experienced in lead management, reporting and analysis. Currently, Steven's focus is on preparing for the University of Sydney's next campaign by contributing to a large and dynamic prospect pipeline and the process improvement to support it. Steven was elected President of Apra Australia in 2021 and is passionate about the Association's mission of advancing the professionalisation and awareness of the prospect development field in Australia.



John McLeod, Senior Research Consultant, Philanthropy Service & Family Advisory, JB Were

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 and recently authored The Corporate Support Report.
He also sits on the Board of several charities including Summer Housing and Philanthropy Australia.

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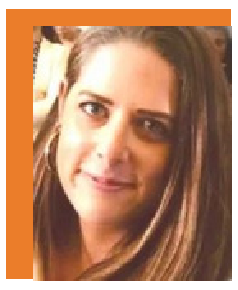
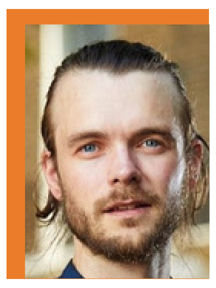


Julia Villiotis, Director, Visualise Fundraising

Julia co-founded Visualise Fundraising in 2021 and has over 14 years' experience across the not-for profit and higher education industries. She has a Bachelor of Psychology (Hons.) and is particularly interested in using psychological science coupled with philanthropic data capture and analytics to provide truly unique insights into organisations' donor-base and prospect pool.



Chris Davis, Chair, Researchers in Fundraising (RiF)

Chris is the Chair of Researchers in Fundraising, the UK special interest group for prospect research. He is also Prospect Research Manager at Birkbeck, University of London, where he is the sole prospect researcher in a team delivering the University's £50 million The World Needs More Birkbeck campaign. He has previously held prospect research roles at the London School of Economics, London Business School, and the Old Royal Naval College, Greenwich.

APRA AUSTRALIA BOARD

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The Apra Australia Board would like to thank all of our presenters and the University of Sydney Staff who have made today possible.