



Australia Chapter



2020 Apra Australia Conference

10-11 November 2020

Day 1 - Tuesday 10 November

10:00 - 10:10 **Welcome and Housekeeping** Stephen Rowe

10:10 - 10:40 **'To You, They're Gold': The Role of Research Analysts in Shaping Major Gift Strategy**

Prospect Research has long been seen as a reactive enterprise, responding to enquiries when asked and given unrealistic expectations for both the timeliness and completeness of reports. They are often not fully engaged in the prospect strategy except to follow up on questions that are posed during discussions between major gift officers.

The current philanthropic climate demands a paradigm shift. Researchers possess the high-level view of a donor, seeing the forest when the gift officer may only see the trees. They can't tell you how the leaves are shaped but they can see the path to the other side. This talk will propose a more proactive role for research, in which analysts work collaboratively on major gift officers' priorities, propose techniques for progressing prospect relationships and support the time management of fundraisers across their portfolios.

Presentation by Weston Bruner, University of Queensland

10:40 - 11:10 **Breakout/Discussion session**

11:10 - 11:50 **Managing Reputational Risk in Major Gifts**

An organisation's reputation is crucial for attracting and keeping donors, but can be damaged by a less-than-desirable association. This presentation will look at reputational risk and major gifts, as well as how undertaking due diligence can help ensure that big gifts don't lead to big trouble for organisations. We will discuss the importance of undertaking research to understand potential red flags in a donor's past or current activities. We will also look at how to build a framework for identifying gifts that require due diligence prior to solicitation or acceptance, as well as how to undertake due diligence research.

Presentation by Victoria Coyne, Western Sydney University and Molly Masiello, FR&C

11:50 - 12:20 **Lunch**

12:20 - 12:40 **Can New Zealand Research Help Me in Australia?**

There are five million New Zealanders across the ditch, but do they get enough attention from Australian organisations? This presentation will argue that there is significant value in exploring philanthropic options in New Zealand and for finding the 'Kiwi connections' of Australia-based prospects.

Presentation by Sean Powick, AskRIGHT

12:40 - 1:10 **Breakout/Discussion session**

1:10 - 1:50 **Even Super Models Have Flaws**

Everyone is talking about the importance of modelling, but who is really confident to say what it is or how it should be used? John will talk through different things that can be considered 'models' highlighting the pros and cons of each method, how you may think about getting started with them and what insight they may (or may not) bring.

Presentation by John Bird, University of Auckland

1:50 - 2:00 **Day One Wrap Up** Stephen Rowe

Finish

Day 2 - Wednesday 11 November

10:00 - 10:10 **Welcome and Housekeeping** Victoria Coyne

10:10 - 10:50 **Kiwis do Capacity Ratings – Why, What, How?**

If you're reading this, you probably know a thing or two (at least) about capacity ratings. But what does everyone else in this profession know? They can't answer that, but Emma and Stephen will get the conversation going by discussing their respective methods for estimating how much a potential prospect can give to any organisation. They will cover some of the theoretical basis for ratings, their own methodologies and their limits, how they work with limited information on income, assets and those tricky 'soft indicators' that live outside the realm of convenient and easy formulas! After their presentation they will open up the floor to questions or comments about this work.

Presentation by Emma Hayward, Deakin University and Stephen Rowe, ANU

10:50 - 11:20 **Breakout/Discussion session**

11:20 - 12:00 **Where to from here? Panel discussion on career paths from prospect development**

Many of us fall in to fundraising and prospect development work, and many of us enjoy it. But what are the possible career paths if that next step within prospect development is not clear? Join two former prospect researchers for a discussion moderated by Stephen Rowe to hear about their current work, what influence their previous roles had on how they got there, and their thoughts on career movement for the wider profession.

*Panel - Conor McCarthy, NLA and Anneke Burlinson, Murdoch University
Moderator - Stephen Rowe, ANU*

12:00 - 12:30 **Lunch**

12:30 - 1:20 **APRA International - Creating a Prospect Development Road Map**

What would your team do if you could do anything? Do you have big ideas but you don't know how to implement them? In 2018, OSU Prospect Development embarked on a project to rethink how we do our work. We divided the scope of our work into six main categories (Data, Products & Services, Training, Impact & Advocacy, Discovery & Identification, Policy & Rules). We looked at each category to define what we are currently doing, what others in the industry are doing, what we want to be doing, and how we could get to that goal. We encouraged everyone to be innovative, think outside the box, and imagine what we would do if we could do anything.

From that exercise we came up with 45 recommendations of ways to change our current work including staffing changes, new products, new partnerships, and new projects, all of which we recommended to leadership and received overwhelming support. Those 45 recommendations encompassed 105 tasks our team would need to undertake over the next 3-4 years. We then mapped each of those tasks to a timeline based on priority and availability of resources to create our road map. We are about a year out from creating that road map and 35% complete with the tasks. We have changed our work significantly in the last 18 months and have become much more effective and efficient with our work. This presentation will focus on the process of creating the road map, how we have implemented the road map so far, and the lessons learned along the way.

Presentation by Jennifer Russell, Senior Associate Director of Prospect Development, The Ohio State University (presented 24 August 2020 at Apra International Conference - Advance Tomorrow: The Prospect Development Virtual Experience)

1:20 - 1:50 **Breakout/Discussion session**

1:50 - 2:00 **Conference Wrap Up** Victoria Coyne

Finish

Speaker Bios



John Bird, Associate Director Business Intelligence, University of Auckland

John leads the Prospect Research and Advancement Services teams at University of Auckland where he has been for just over 3½ years. With previous experience working at Blackbaud and for another fundraising CRM supplier in the UK, his focus is on finding ways to get the most out of the wealth of data his team holds on its constituents in addition to expanding the range and depth of data available to researchers and development managers.



Weston Bruner, Director of Advancement for the Faculty of Humanities and Social Sciences, University of Queensland

Weston leads fundraising and alumni engagement for the University's largest Faculty through the Not If, When capital campaign. Prior to joining UQ he served as Development Manager at the University of Adelaide, working to enhance the central office's major gift program. From 2012-2014 he was the Assistant Director of Development at the Elliott School of International Affairs at the George Washington University in Washington DC. Weston is proud to have started his career as a Development Research Analyst at the University of Michigan. Weston holds a BA from the University of Michigan and a MBA from the University of Adelaide.



Anneke Burlinson, Manager - Advancement Operations, Murdoch University

Anneke's career as an Advancement professional began a decade ago when she was tasked with establishing the Prospect Development team at the University of Western Australia. She and her team were part of what was the largest capital campaign for Western Australia. In mid-2017, she moved to Murdoch University to help build its Advancement Operations unit, in the areas of Information Management, System Development and Support, Prospect Development and Gifts Stewardship.

Anneke brings her experience and expertise from her earlier roles and studies at Ludwig Maximilian University, University of Indonesia and California State University, Chico.

She currently serves on the Editorial Board for CASE Asia Pacific Charitable Giving Survey and the Murdoch University's CRM Steering Committee.

Speaker Bios



Victoria Coyne, Manager of Prospect Development and Research, Western Sydney University

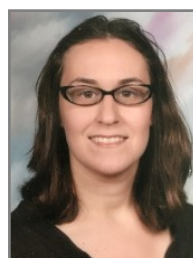
Victoria has 30 years' experience as a fundraiser, having worked across the education, welfare, international aid, medical research, and aged care sectors. Her experience includes major gifts, bequests, direct marketing, events, donor stewardship and communications.

Victoria is a past recipient of the FIA's 'Most Outstanding Fundraising Project of the Year' award. For the last eight years, Victoria has managed Prospect Development and Research at Western Sydney University. She is a board member of APRA Australia.



Emma Hayward, Manager - Prospect Research, Deakin University

Emma is a dedicated knowledge professional with a diverse career spanning the public, private and higher education fields. She has over 10 years' experience as a Prospect Researcher, first as the Manager of Prospect Research at the University of Auckland (2009 – 2014), where she was a part of the University's first ever capital campaign, and is currently the Manager of Prospect Research at Deakin University. She is experienced in all aspects of prospect research and management, as well as setting up a prospect research unit and building a team. Emma is also experienced in the intricacies of conducting prospect research in Australia, New Zealand, and internationally, as well as conducting wealth screenings, portfolio optimisation, and moves management. Emma was the previous Secretary Apra Australia.



Molly Masiello, Research Manager, Fundraising Research & Consulting

Molly has been Research Manager at FR&C since 2014 and during that time has worked with hundreds of organisations across the education, arts, charity and health sectors. She previously held prospect research positions at the California Institute of Technology, as well as the University of Sydney. Prior to her positions in the fundraising space Molly spent 10 years as a librarian, working at the Los Angeles Public Library and the State Library of Western Australia.

Molly is Treasurer of Apra Australia, the professional body for Australian fundraising researchers. With her colleagues at FR&C, Molly is co-author of 'Understanding Major Donors: A Guide to Prospect Research for Australian Fundraisers' (2017).



Conor McCarthy, Director of Philanthropy, National Library of Australia

Conor McCarthy is Director of Philanthropy at the National Library of Australia. Prior to joining the Library in 2019, he held prospect development roles with Fundraising Research & Consulting, UTS and the University of Sydney. With his former FR&C colleagues he is co-author of 'Understanding Major Donors: A Guide to Prospect Research for Australian Fundraisers' (2017).

Speaker Bios



Sean Powick , Research Officer, AskRIGHT

Sean has been researching sources of support for charities and non-profit organisations in both Australia and New Zealand for three years. In 2018, Sean moved to Brisbane from Nelson, New Zealand, to join the AskRIGHT Research Team in aggregating comprehensive details of each individual private ancillary fund to maintain and update The Complete Guide to Australia's Private Ancillary Funds. The database has now expanded to include Public Ancillary Funds and will soon capture other trusts and foundations, and Sean has played an important role in leading these research projects. In New Zealand, Sean has been instrumental in the development of a new grants database (GrantsWIZ™), and he has completed prospect research, data analysis, and screening services for organisations and fundraising campaigns throughout Australasia. Sean is currently based in the AskRIGHT Christchurch office and is also completing a Bachelor of Commerce in Management and Economics at The University of Canterbury.



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

Stephen has worked in prospect development since 2007, starting 'across the ditch' at the University of Auckland, New Zealand, before making the big move to the University of Sydney in 2011, and what many might call the smaller move to the nation's capital, Canberra, in 2012 to found the Prospect Research & Briefing unit at the Australian National University. Stephen's involvement with the wider prospect development community began in 2014 when the first Australian Prospect Research Forum was hosted at ANU, a now-annual gathering of prospect development professionals. Stephen has been President of Apra Australia since 2018.



Jennifer Russell, Senior Associate Director of Prospect Development, The Ohio State University

<https://www.linkedin.com/in/jennifer-russell-b6333a26/>

Zoom Guide

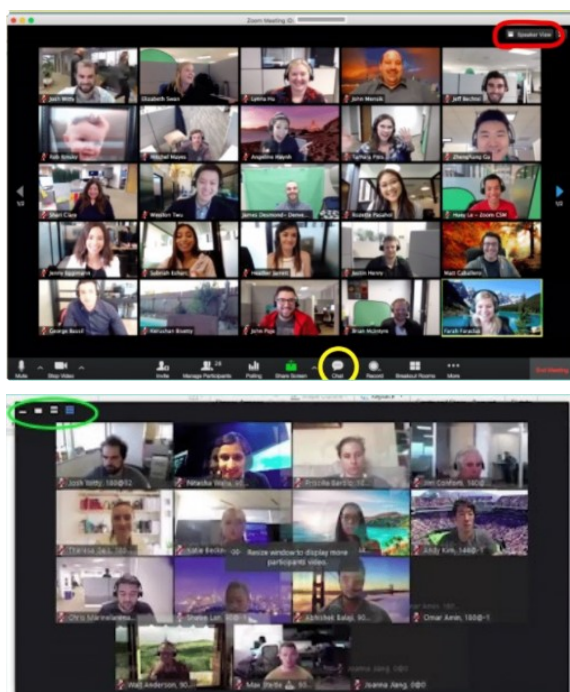
To try and replicate the feel of an in-person conference, we are utilising a Zoom meeting. This option will allow you to have a single sign-in link while enjoying all the sessions and networking opportunities.

To ensure there are no accidental interruptions during sessions, all attendees will start muted. You will not have the ability to unmute, but we will do that for you during breakout discussions and social times.

For those unfamiliar with Zoom features, the images below have a couple of tips to help make the most of your experience.

If you experience any technical difficulties that aren't immediately addressed by the hosts, please do not utilise the in-Zoom chat feature. Please email info@apraaustralia.org.au

We are reserving the in-Zoom chat feature for speaker Q&As.



In-between presentations and during social times, there are two main views, speaker and gallery. The example on left is the gallery view.

To change to speaker view, where the person talking takes up most of the screen, select "Speaker View", highlighted in red.

To ask questions during speaker Q&As, utilise the chat feature, highlighted in yellow.

During sessions, speaker will be sharing their screens so you can see their presentation. There are a few viewing options available to you. In the image to the left highlighted in green, you'll see different configurations of rectangles. Choose the one you find most useful.

— Small line: with the first (leftmost) option, you won't see anyone's faces, only the shared screen.

■ Square: with the second option, you will only see the speaker's face.

≡ Stacked lines: with the third option, all participants will appear in a straight line along one side of your screen. There will be an arrow that allows you to scroll through everyone.

Time Zone Converter

	WA	NT	QLD	SA	NSW/ACT/	NZ
Begin	7.00 AM	8.30 AM	9.00 AM	9.30 AM	10.00 AM	12.00 PM
End	11.00 AM	12.30 PM	1.00 PM	1.30 PM	2.00 PM	4.00 PM

Conference Leadership

Organised by the Apra Australia Board

President - Stephen Rowe, Australian National University

Vice President - Priya Kanji, University of Auckland

Secretary - Rhia Saggers, Edith Cowan University

Treasurer - Molly Masiello, Fundraising Research & Consulting

Ordinary Committee Member - Victoria Coyne, Western Sydney University

Ordinary Committee Member - Tim Grime, University of Western Australia

Conference hosts

Day 1:

MC - Stephen Rowe

Zoom - Rhia Saggers


Day 2:

MC - Victoria Coyne

Zoom - Molly Masiello

Conference Program

Design - Tim Grime

 info@apraaustralia.org.au

 [apra Australia](https://www.linkedin.com/company/apra-australia)

 apraaustralia.org.au/