

APRA AUSTRALIA CONFERENCE 2017

DEAKIN DOWNTOWN
MELBOURNE, AUSTRALIA

14 AUGUST 2017

What is Apra?

For 30 years, Apra was an acronym. The “American Prospect Research Association” became the “Association of Professional Researchers for Advancement”. Members include professionals who drive their institutions' philanthropic missions through work in prospect development and prospect research, data analytics and data management, annual giving, advancement, special gifts and more.

Apra has 29 chapters across the United States, Canada and Australia

Apra Australia

As fundraising grows in importance for charitable causes in Australia, so does the significance of involved individuals utilising analytical skills, data-driven insights and collaborative relationships.

The Apra Australia Chapter was established at the beginning of 2017, by a dedicated group of volunteers. It is the first Chapter to be established outside North America.

Apra Australia enables the formal creation of a robust network of colleagues for the sharing of information, resources and skills to advance their own professionalisation and missions of their institutions.



agenda

8.30am-9.00am
ARRIVAL TEA &
COFFEE



9.00am-9.15am
Formal Welcome

*Brenda Cherednichenko, Deakin University,
Belinda Partyga, Australian Chamber Orchestra
& Renae Randle, Mater Foundation*



9.15am-9.45am

Prospect Research Survey
Results & Apra Australia Update
*Stephen Rowe,
Australian National University*



9.45am-10.15am

Prospect Research in
Australia: Five Trends
Conor McCarthy, FR&C



10.15am-10.40am
MORNING TEA



12.30pm-1.10pm
LUNCH



1.10pm-1.50pm

PAF's State of Play
*John McLeod, JBWere Philanthropic
Services*



1.50pm-2.20pm (Interactive)

Another Dimension:
"Breaking the Fourth Wall"
*Eresha De Silva, Macquarie
University & Belinda Partyga,
Australian Chamber Orchestra*



2.20pm-3.00pm

Building a Prospect Management Team
Daraus Mirza, Deakin University



3.00pm-3.20pm
AFTERNOON TEA



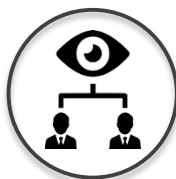
10.40am-11.20am (Panel Discussion)

Prospect Research:
Higher Education and Beyond
*Mark Mahony, Art Gallery of NSW
Renae Randle, Mater Foundation
Laurel Robinson, World Vision Australia
Victoria Coyne, Western Sydney University
Tim Grime, University of Western Australia
Nicki Sayers, Victoria University of
Wellington
Moderated by Molly Masiello, FR&C*



3.20pm-4.10pm (Interview)

UK Privacy and Risks to Australia
*Adrian Beney, More Partnership (UK)
& Edwina Kenrick, University of Melbourne*



4.10pm-4.45pm

Insider Views
Vanessa Meachen, Deakin University



11.20am-11.50am
Demystifying Analytics
Deb Hyland, University of NSW



11.50am-12.30pm
Moves Management

*Jennifer Doubell & Eric Cheng,
Peter McCallum Cancer Institute*



4.45pm-5.00pm

Close & Thank You
*Daraus Mirza,
Belinda Partyga &
Renae Randle*



WELCOME

Professor Brenda Cherednichenko, Executive Dean of the Faculty of Arts and Education, Deakin University

Brenda is currently the Executive Dean of Arts and Education at Deakin University. Her previous roles include Edith Cowan University's Pro-Vice-Chancellor, Engagement, Equity and Indigenous and the Executive Dean Faculty of Education and Arts, Director Access and Success, Victoria University and Head, School of Education, Victoria University.

With a teaching background in schools, teacher education and the social sciences, Brenda's research has focussed on educational equity and community/university partnerships for improved educational opportunity and socially just outcomes. She has worked on projects and partnerships in several states and with Indigenous Australian leaders and communities to enhance educational and social experiences for Aboriginal and Torres Strait Islander peoples. Brenda chaired the 2015 Excellence in Research Australia panel for Education and Human Studies and was President, Australian Council of Deans of Education. She is an inaugural Fulbright Ambassador, Chair of the Australian Fulbright Commission Victorian Selection Committee in 2012 and was a Fulbright Senior Scholar in 2009.

She is also a Director of the Origin Foundation Board, a Graduate of the Australian Institute of Company Directors, a member of the Warmambool Art Gallery Board, the Australian College of Educators and international peer review journal editorial committees, including Transform: The Journal of Engaged Scholarship.



PROSPECT RESEARCH SURVEY RESULTS & APRA AUSTRALIA UPDATE

Session Description:

This presentation will be in two parts: The first is an introduction to Apra Australia - the journey so far and next steps for the organisation, including how to get involved. The second will outline highlights of the third (2017) Australasian Prospect Development Survey, and attempt to draw comparisons with previous surveys to give the audience an idea of both recurring themes and observable developments in the field.

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

Stephen has managed prospect development at the Australian National University since 2012, when he was persuaded to venture south from the University of Sydney. A Kiwi, he flew to Sydney from the University of Auckland in 2011 where he was involved in Australasia's first university capital campaign, but got his actually-quite-relevant Arts degree from Victoria University in Wellington after hopping across the Cook Strait from Marlborough. He enjoys doing interesting work with interesting people and probably gets too excited when he finds prospects who like cricket.



PROSPECT RESEARCH IN AUSTRALIA: FIVE TRENDS

Session Description:

Conor draws on a diverse range of data to discuss five key trends affecting Australian prospect research and major gift fundraising in 2016-17: in wealth and giving, transparency and privacy, and continuity and change.

Presented by Conor McCarthy, Consultant, Fundraising Research & Consulting (FR&C)

Conor previously served as Managing Director at FR&C. With his FR&C colleagues, he is co-author of Understanding Major Donors: A Guide to Prospect Research for Australian Fundraisers. Prior to FR&C he worked in prospect development roles at UTS and the University of Sydney.



PROSPECT RESEARCH: HIGHER EDUCATION AND BEYOND

Session Description:

As Prospect Research in Australia's begins to move beyond the University sector – with more fundraising organisations in more areas employing Prospect Research to maximise their strategic fundraising efforts – what are the implications for Australian Prospect Research professionals?

In this session, we will explore the different challenges, demands and operational duties for researchers working both in the higher education sector in Australia, and in emerging fundraising research areas including health, the arts, and consulting.

What differences, and similarities, exist between Prospect Researchers in these diverse sectors? Further, how can we support and develop Australian research professionals with the skills and experience to succeed across the increasingly broad spectrum of Australian fundraising?

Panel discussion with:

Mark Mahony, Prospect Research Manager, Art Gallery of NSW

Mark is responsible for development, sponsorship, and government research to support the Sydney Modern Project, a \$350 million capital project doubling the size of the existing gallery; as well as ongoing development research work in the area of acquisitions support, annual giving, corporate partnerships, grants, and government/stakeholder relations.

Mark is a former Prospect Research Associate at the University of Sydney, where he was part of the Development team leading the university's (then) \$600 million Inspired! campaign.

Mark has been actively involved in some of the largest philanthropic gifts in Australian history, in both the university and cultural sectors, and has over ten years' experience in research and information management across libraries, universities and cultural institutions.



**Renae Randle, Prospect Researcher, Mater Foundation**

Renae commenced her career in Sponsorship and Event Management, working primarily in community and member focused organisations including Quest Community Newspapers (part of NewsCorp Qld) and RACQ. During this time, she worked alongside many not-for-profit organisations and was always inspired by the passion and drive of those who worked tirelessly for their cause.

In 2014 an opportunity to 'jump the fence' arose and Renae stepped into a Corporate Partnerships contract role with Mater Foundation, entering the world of not-for-profit. At the end of the contract Renae stepped into a newly created Prospect Research role with the Foundation – an opportunity that has proved to be one that has allowed a lot of learning, along with a sense of accomplishment.

**Laurel Robinson, Manager, Prospect Development, World Vision Australia**

Laurel graduated Summa Cum Laude from Washington State University with a BA in Business Administration, Finance and Minor in Economics. She attended post-graduate school and holds an MBA from Pacific Lutheran University.

Laurel began her career with The Boeing Company in Seattle, Washington working in various Finance & Accounting roles. After 11 years with Boeing, she sought a career change deciding to align her career with her faith and follow her passion of helping those in need. In 2007, she joined World Vision United States and had various roles including the Director of Strategic Planning & Finance for the Philanthropy team and Manager of Prospect Management and Data Analytics on the Prospect Development team.

Laurel has two+ years in the Prospect Development field helping both World Vision US and World Vision Australia build their Prospect Development departments from scratch. She loves how the field aligns her background of data analysis with the creativity of fundraising.

Laurel is married to Ken and they will celebrate their 20th wedding anniversary this month. Ken's job brought them to Australia two years ago, and they love exploring this beautiful country. In her spare time, Laurel enjoys travel, music, hiking, tennis, golf and taking her two miniature dachshunds for walks on the beach.

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

Victoria has more than 25 years of fundraising and communications experience spanning education, healthcare, medical research, aged care and global aid & development sectors.

**Tim Grime, (Acting) Manager, Prospect Development, University of Western Australia**

Tim joined the University of Western Australia in May 2016, initially as a Prospect Intelligence Analyst, but within a few months had been seconded to manage the team. From a team of four when he joined, the prospect development team whittled down to one for six months, due to various circumstances, thereby proving that there is an "I" in team!

His background prior to UWA is almost 20 years in the media industry as database manager, advertising strategist, media analyst, media and market researcher, and marketing manager. In his personal life, he is kept on the straight and narrow by his four kids, but occasionally allowed to wander off to pursue his passion of photography.

**Nicki Sayers, Manager, Donor and Prospect Research, Victoria University of Wellington**

Nicki is the first person to hold this role she established all the systems and processes necessary to develop and manage a prospect pool to support all major gift fundraising.

Prior to taking this role in 2012 Nicki worked as a fundraiser and prospect researcher. As a fundraiser she's worked for charities working with young people, for women's health, and hospice.

As a prospect researcher she worked for Saints Information, New Zealand's only prospect research company dedicated to the non-profit sector, conducting research on individuals, organisations and foundations globally.

**Moderated by Molly Masiello, Research Manager, FR&C**

Molly joined FR&C in March 2014 and brings a wealth of experience in prospect research and management in the Higher Education sector. She specialises in prospect research and management, data analytics, and database management. She held prospect research positions at the California Institute of Technology in Pasadena, California, 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.

DEMYSTIFYING ANALYTICS

Session Description:

Fundraising analytics can help you uncover and realise your organisation's philanthropic potential, but the conceptualisation, scale and complexity of accurately leveraging 'big data' can often be time-consuming, overwhelming and, unless carefully planned, lead to inaccurate results. This session will explore what the term 'analytics' really means; provide an introduction to the types of analytics' models; and illustrate specific examples on how analytics can inform fundraising.

Presented by Deborah Hyland, Prospect Development Manager, University of NSW

Deborah currently oversees Prospect Development at UNSW. She was previously a Manager of Advancement Research and Prospect Management at the University of Queensland and served as Prospect Research Officer at the University of Sydney during the University's Inspired Campaign.

In addition to her roles with several of Australia's Go8 Unis, Deborah has staffed numerous successful campaigns in the United States 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 previously served on the boards of both the APRA Virginia and APRA-METRO DC chapters. 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 enjoys the East Coast lifestyle, including the vibrant city life of Sydney and the beautiful coastal landscapes of Queensland.



MOVES MANAGEMENT

Session Description:

Prospecting is one of the important phases in the moves management cycle. It enables a gift solicitor to make an informed decision about how a potential donor should be approached. At Peter Mac, like in most worthy charitable organisations seeking philanthropic support, we often ask ourselves: How well do we know our donors?; Who is most likely to support our work and where do we find them?; and How much should we ask them for?

Jennifer Doubell and Eric Cheng will speak about their rewarding experiences and insights into the importance of prospect research and the moves management approach.

Presented by Jennifer Doubell, Executive Director, Peter MacCallum Cancer Foundation

Jennifer Doubell has worked in the not for profit sector for more than 30 years, initially as a social worker and criminologist, and for the past 25 years, in development and fundraising. She is a specialist in fundraising and philanthropy, and not for profit management.

Jennifer is currently the Executive Director of the Peter MacCallum Cancer Foundation and serves on the Board of the Victor Chang Cardiac Research Institute and the Board of the Fundraising Institute of Australia. Previous roles include National Fundraising Director at the Heart Foundation, Director of Development and External Affairs at the University of Sydney and at the Australian Graduate School of Management, and Group Manager, at The Wesley Mission, Sydney, and NFP board and mentoring roles across a wide range of organisations. In total across her various senior management positions in a number of organisations she and her teams have raised in excess of \$0.5bn. She is the recipient of many industry awards for her work.

Jennifer holds the internationally recognised Certified Fund Raising Executive (CFRE) accreditation. In addition to qualifications in social work and criminology, Jennifer holds a BA, Master of Science (Economics), and Master of Arts degrees.

In March 2016, Jennifer was awarded Australia's highest fundraising honour, the Fundraising Institute of Australia's '2016 Arthur Venn Fundraiser of the Year Award'. This annual award recognises fundraisers who have made an outstanding contribution to fundraising in Australia and who have shown consistent excellence and best practice through their actions, leadership and intellect.

Eric Cheng, Major Gifts Manager, Peter MacCallum Cancer Foundation

Eric Cheng has dedicated his career in the last decade to the art of asking. Beginning as an advertising graduate at a direct mail agency in Melbourne, then an advertising campaign executive at Fitness First, Eric has worked with some of Australia's most iconic consumer brands on integrated marketing campaigns.

In 2010, Eric moved into the public sector to specialise in the major donor program at Monash University, and now at the Peter MacCallum Cancer Foundation – a recipient of numerous Fundraising Institute Australia awards.

Eric is the Major Gifts Program Manager at Peter Mac where he oversees program operations to grow and maximise year-on-year major gifts; providing specialist advice, major gifts cultivation and solicitation strategy, as well as innovative stewardship plans. In his role, he works with Australia's brightest minds in cancer research to cultivate corporate, personal and family philanthropy to support the Peter MacCallum Cancer Centre's strategic priorities in research, clinical and capital needs. Eric has helped lead the major gifts program to achieve major gifts income of \$26 million over recent years.

Eric is currently completing a Master of Social Investment and Philanthropy, holds a Bachelor of Communications and a Diploma of Fundraising Management. Until recently, Eric served as a councillor to the Victorian Multicultural Commission.



PAF'S STATE OF PLAY

Session Description:

The emergence of Private Ancillary Funds (PAFs) as a philanthropic vehicle in 2001 and their extraordinary growth since has led to new and very different opportunities for the charity sector. The combination of strong distribution growth, a now huge philanthropic capital pool and largely, a new cohort of significant social partners should be welcomed by the sector but is yet to be fully understood and engaged. This session will examine the PAF world, where it fits into the broader philanthropic pie and opportunities for engagement.

Presented by John McLeod, Senior Consultant, JBWere Philanthropic Services

John joined JBWere Philanthropic Services on its establishment in 2001 after 15 years as a financial analyst with JBWere covering resource strategy and manager of the Resource Research group within the firm's top-ranking strategy team. He produces widely read reports on Australian Giving Trends and on the Private Ancillary Fund and charitable trust sector. He co-authored the "Impact – Australia" report in 2013 highlighting the current practice and growth potential for Impact Investing and authored "The Cause Report" on the evolution of the NFP sector in Australia over the last 20 years and examined the implications for its future direction. Most recently, John authored "The New Zealand Cause Report" providing a detailed analysis of the trends and direction for the not for the profit and charity sector.

John also presents at a range of conferences and workshops on issues related to philanthropy as well as the governance of charitable trusts and measurement of social return and trends in the charity sector. He also sits on the Board of a number of charities including the Council of Philanthropy Australia.

ANOTHER DIMENSION: "BREAKING THE FOURTH WALL"

Session Description:

Exploring the technique of reaching beyond the ratings of major gift prospects for our "audience", whether they are development officers, senior executives, or board members. We intend to share and discuss another dimension of prospect research, which can assist in achieving the goal of gift attainment; helping to guide the cultivation strategy of your "audience" and providing them with a deeper understanding of potential donors.

Presented by Eresha De Silva, Manager, Prospect Research, Macquarie University

Eresha established the prospect research function at Macquarie University, which services a range of university wide "customers" amongst them the vice-chancellor's office, senior executive, Development, Alumni Relations and Faculties. As well as domestic, there is a high international prospect and donor base at Macquarie, and Eresha has connected with a global network of contacts and consultants to assist with gathering information. Eresha's background is in Information Technology and Project Management and she has wide experience in CRM Systems, as well as the Health, Property Management, Finance and Education industries.

Belinda Partyga, Philanthropy Prospect Researcher, Australian Chamber Orchestra

After time spent abroad in the UK, Belinda returned to Australia and started work in the Office of Advancement at Macquarie University, leading her down a non-linear path to prospect research.

In 2016, she joined the Australian Chamber Orchestra as Philanthropy Prospect Researcher, and has established effective and creative strategies to support various campaigns.

Previously, she was Prospect Research Coordinator at Macquarie University and was part of setting up its prospect research function. She has worked across the areas of Alumni and Community Relations, Planned Giving, Major Gifts and Corporate Engagement.

BUILDING A PROSPECT MANAGEMENT TEAM

What are the key ingredients for building a successful team? How do we get desired results regardless of the size of the team?

This session will engage attendees in a discussion on the best way to build a prospect management team that is equipped for success. Based on his extensive experience, Daraus will share his insight and facilitate a discussion about strategies for success. He will talk the audience through his recipe for building a great team behind the scenes for achieving desired results.

Presented by Daraus Mirza, Director of Advancement Services and Operations, Deakin University

Passionate about organisational development, Daraus has been applying his skills and energy to the not-for-profit sector for more than two decades. From developing program strategies to supporting professionals to achieve greater success, he enjoys building organisational capacity and contributing to the development of innovative and efficient work environments. While he appreciates creating and implementing solid plans, being open to course correction is crucial to his approach. He is just as driven by the journey as he is about meeting targets.

Daraus' latest achievement is the creation of a successful professional service area at Deakin University. From a clear vision, he created an efficient Advancement Services team structure, identifying critical resources necessary for success. Less than three years later, his implementation plan has produced a team of high performing professionals able to deliver quality work in prospect research, gifts management and information solutions that facilitates and supports Advancement programs.

Currently Director of Advancement Services and Operations at Deakin University, Daraus has a Masters in Training and Organisational Development from Montclair State University and a Bachelor of Business Studies from the State University of New York College of Buffalo.

Session Description:

A webinar presentation consisting of an interview with Adrian Beney, Partner at the More Partnership. The conversation with Edwina Kenrick from the University of Melbourne will unpick key issues relating to recent developments in the UK involving the Information Commissioner's Office (ICO) and the UK Charity Sector which are impacting both the charity and higher education sectors there. It will explore the extent to which prospect research operations in Australia may be affected by these developments.

Adrian Beney, Partner, More Partnership

Before More Adrian was a fundraiser at the University of Durham for more than 20 years, establishing the Development office, and programmes in Alumni Relations, Major Gifts, Regular Giving, Prospect Research and more.

With More Partnership, he has been involved in a wide range of work involving donors, institutional leaders, governors, volunteers and staff. He was one of the authors of the Pearce Review of Philanthropy in Higher Education and the subsequent workforce development review. He led the data analysis for each of these projects and for subsequent projects with a range of clients in the UK, continental Europe and the United States. Since 2015 he has led More Partnership's response to the changing fundraising regulatory environment. He has also led More's Regular Giving Benchmarking projects since 2010.

Adrian is currently working with a number of clients in the education, arts and not for profit sectors on their regulatory compliance.

He was the first non-North American recipient of CASE's Crystal Apple Award for Excellence in Teaching, a member of CASE's Philanthropy Commission, and a faculty member for the Spring Institute in Educational Fundraising. He was given CASE Europe's Distinguished Service Award in 2015. He was for seven years a Lay Member of Chapter of Durham Cathedral and is now a Canon of Tamale Cathedral in northern Ghana.

Edwina Kenrick, Head of Research & Prospective Donor Management, University of Melbourne

Edwina is Head of Research & Prospective Donor Management at the University of Melbourne. She joined University of Melbourne Advancement in 2005 and led the establishment of the prospect research team. As a prospect development professional, she has been involved in the planning and implementation of the University's ongoing \$1 billion campaign.

Prior to this she worked in the financial services sector in the UK and as a librarian in the not-for-profit sector in Australia.

She is a member of the organising committee for the Apra Australia Conference.



INSIDER VIEWS

Session Description:

As the old saying goes, "when you've seen one foundation, you've seen one foundation". The philanthropic sector is incredibly diverse, and it's difficult to come to any solid conclusions about it. During her 15 years at peak body Philanthropy Australia, Vanessa Meachen experienced a wide spectrum of philanthropic giving and givers. Join her to learn some of the insider secrets about the sector and how it works – and where it may be going in the future.

Presented by Vanessa Meachen, Trusts & Foundations Coordinator, Deakin University

Vanessa has spent two decades in the philanthropic sector, most notably 15 years at its peak body, Philanthropy Australia, where she did everything from training grantseekers and writing guides to giving, to coordinating complex policy papers. This gave her extensive understanding of philanthropy in Australia and a passion for growing and democratising it. Immediately prior to her role at Deakin, Vanessa was Development Manager at Trust for Nature. She is also a Founding Member of Impact100 Melbourne and a trustee of the Australian Neighbourhood Houses and Centres Association (ANHCA) Public Fund for DGR.



Notable Sessions:

**People I liked
(and want to keep in touch with):**

Thoughts I had:

Apra Australia would like to thank Deakin University for their generosity and support in hosting this year's conference.

Special thanks to:

Ron Fairchild, Chief Advancement Officer

and his team

Lauren Abel, Marita Baum, Tamara Chalmers, Emma Hayward, Stephanie Kenéz,
Daraus Mirza, Marika Thomson

Apra Australia Committee Members:

Conference Organising Committee

Virginia Bleasel, Anneke Burlinson, Tim Grime, Charlotte Grimshaw, Edwina Kenrick, Molly Masiello,
Belinda Partyga (Co-Coordinator), Renae Randle (Co-Coordinator)

Online Organising Committee

Virginia Bleasel, Mark Mahony (Coordinator), Molly Masiello, Adriana Sung, Dan Hui Wang

Organisational Framework Committee

Eresha De Silva, Tim Grime, Charlotte Grimshaw, Edwina Kenrick (Co-Coordinator), Molly Masiello,
Babette Pearson, Renae Randle, Stephen Rowe (Co-Coordinator)

If you are interested or would like more information about becoming an Apra Australia Committee Member, please contact Stephen Rowe on +61 2 6125 9519 or at stephen.rowe@anu.edu.au



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