

From Pitch to Impact

Week 1

Presenter: Catherine Brooks, CEO Equitable Philanthropy

Council Member, Institute of Community Directors

May 2025

Professional Biography
Catherine Brooks

- Catherine acts as the bridge between funders and charities
- Practicing lawyer – Catherine has been working in the Not for Profit sector for 18 years (in Vic, NSW and QLD)
- Council Member – Institute of Community Directors Australia
- Donor – Geelong Community Foundation, Monkey Baa theatre company and Bridge It



"I understand that philanthropy is about creating lasting legacies of impact."

Catherine Brooks

Not for profits

Equitable Philanthropy workflow

Step #4

Funder engagement: funder introductions, 2 x roadshows per year (Syd/Melb) and personalised funder introductions

Step #3

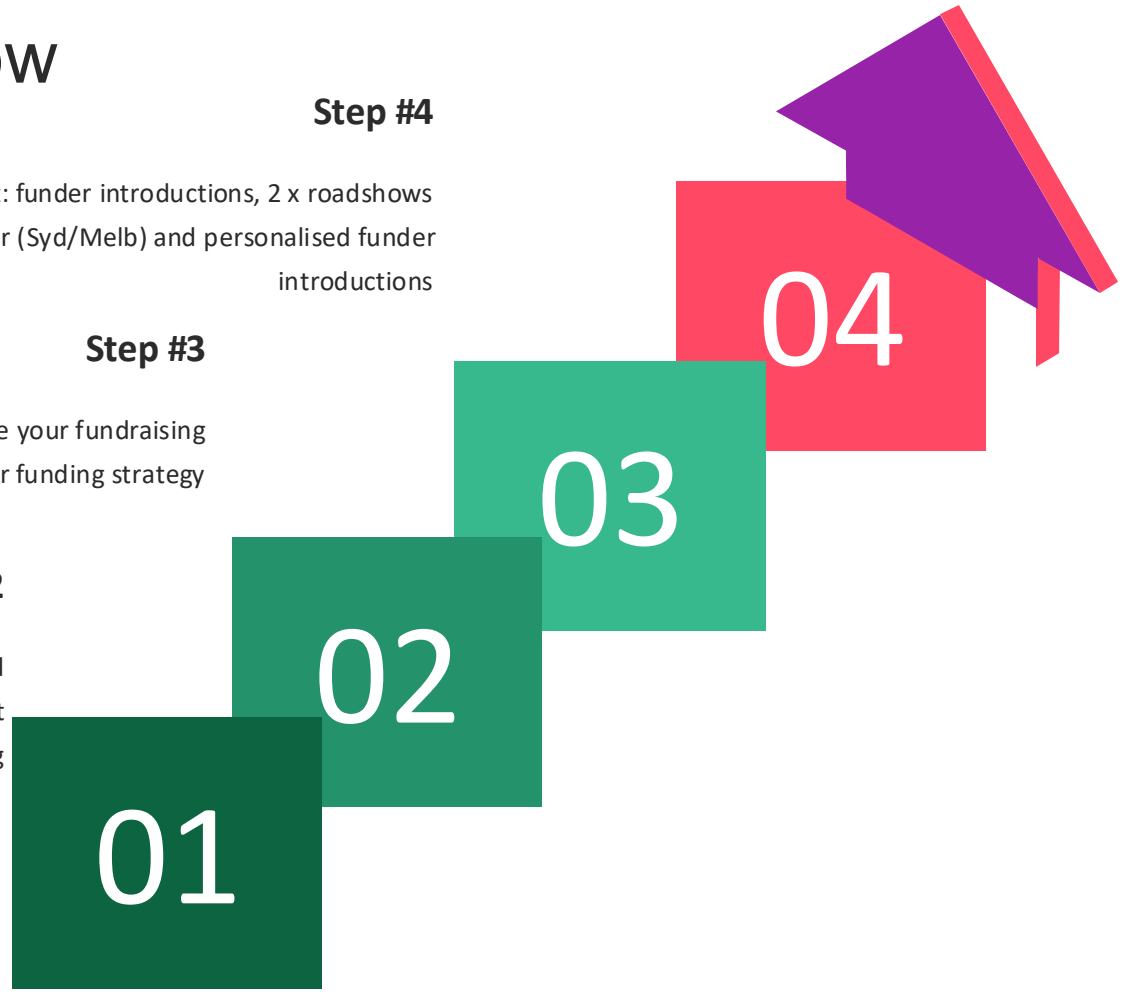
Go to market: we become your fundraising personnel and implement your funding strategy

Step #2

Capacity accelerator program for CEO and Board members: Pitch development, project prioritisation, market testing

Step #1

Investment readiness process: due diligence process and develop funding strategy



Due Diligence

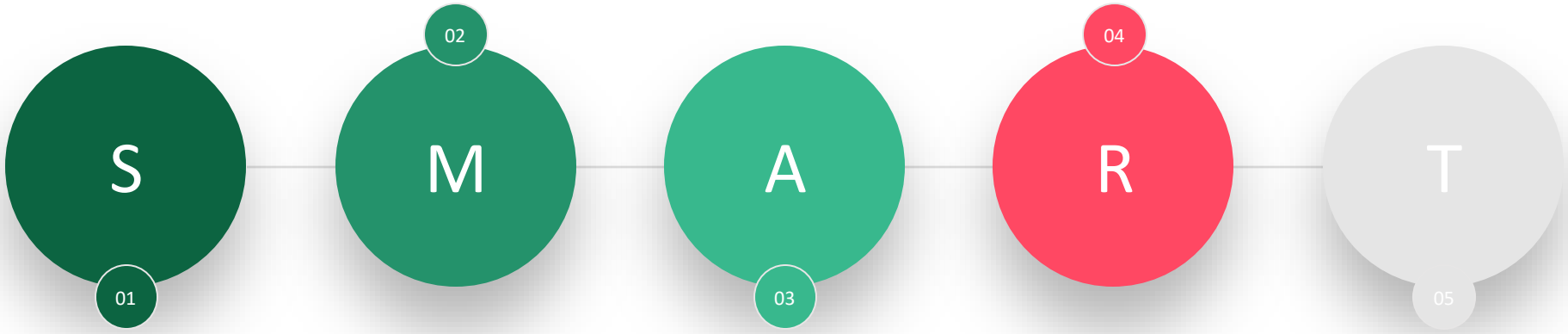
Our promise to funders

Leadership

Assessment of CEO, Board (particularly Chair) and succession planning

Market ready

Completed funding readiness + test and trust process



The Fundamentals

ACNC and other regulatory compliance, sound financials, good governance, risk minimisation strategies

Strategy and project delivery

Clear strategy aligned to programmatic outputs

Proven track record

Outcomes achieved and on track to align with funder expecations and acquittal / reporting

Outline of the course

Workshop 1: Understanding Your Audience and Crafting Your Core Message

Workshop 2: Creating Emotional Connections Through Stories

Workshop 3: How to Build a Funder-Ready Pitch and Roadmap for Success

Week 4: Implementing Your Pitch and Engaging Stakeholders

Purpose of the course

Clarity: Create a pitch that funders instantly understand and connect with

Confidence: Deliver your pitch with authority, whether to major donors, trusts, or foundations

Results: Build long-term relationships with funders that lead to lasting financial support

Outcomes of the course

A Compelling Funder-Ready Pitch: Learn how to communicate your organisation’s mission with clarity, evidence, and emotional resonance

Confidence to Make the Ask: Walk into every funding conversation prepared and self-assured

An Actionable Fundraising Roadmap: Develop a clear, step by step plan to secure funding in 2025 and beyond

Week 1

- Explore audience segmentation: trusts and foundations, major donors, and other key segments
- What funders need to hear: aligning your pitch with their priorities
- Case studies of the best pitches
- Collating organisational data and case studies to showcase impact.

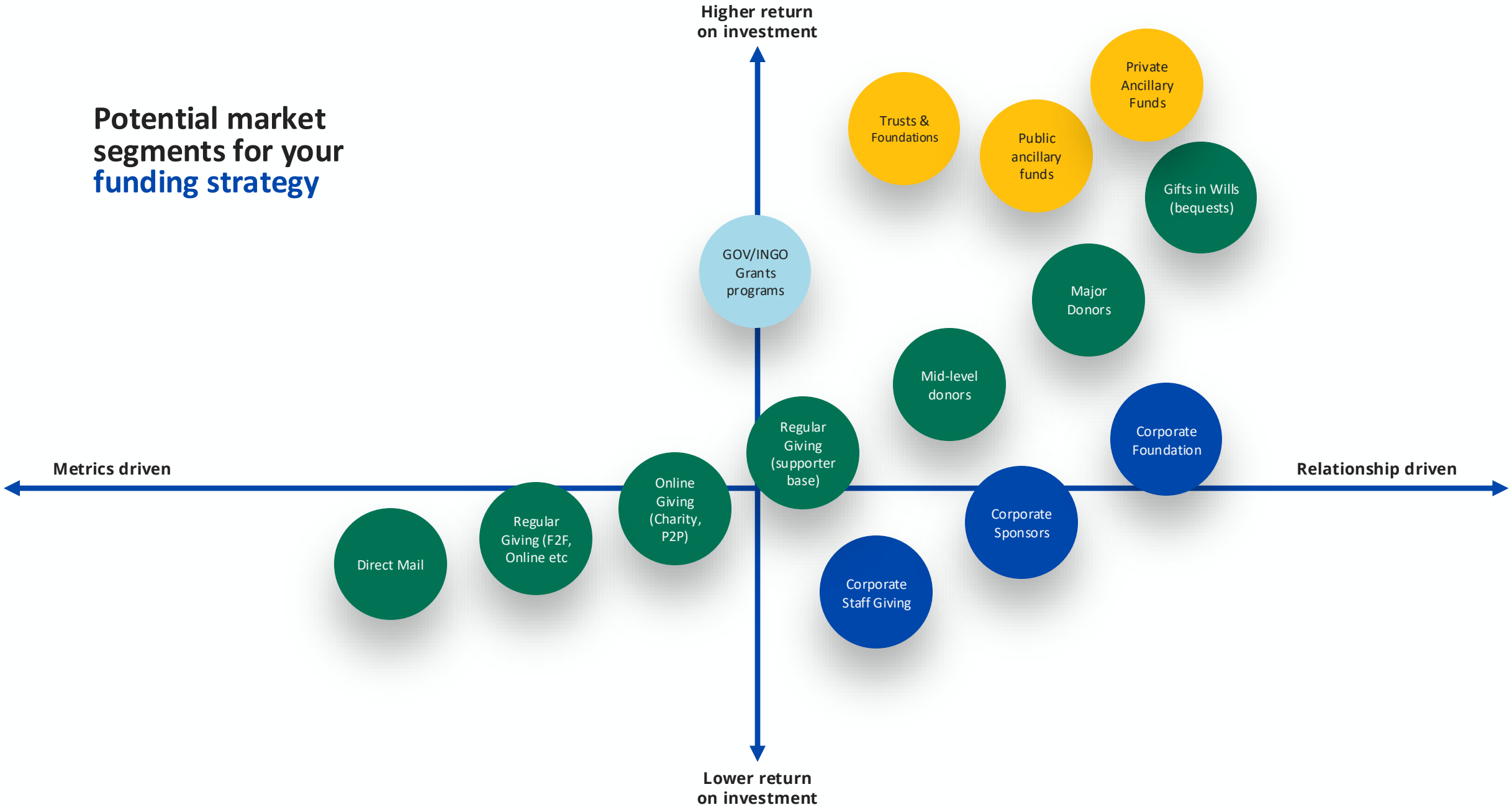
Week 1 – Worksheets for Session 1
Refining your organisational summary

- You will start preparing your concise organisational summaries using our worksheets to communicate:
    - How to explain what your organisation does
    - The need for your organisation

But First:

The Funding Landscape and Market Segments

Potential market segments for your funding strategy



philanthropy in Australia



Total charity sector revenue = approx. $190b/year

From the report:

- **Over $13b donated to charities in 2021 (an increase of 26% since 2017)**
- **6 million people volunteered in 2022**
- **The Productivity Commission expects giving to increase by $6.4b or 48% by 2030 (average nominal growth rate of 7.9%)**
- **Fewer ple claiming tax deduction but those that do giving more**
- **Almost half of all tax deductible donations are made by people who are in the top 1% of income earners**

The Big 4
Funding streams

13b+

Major Gifts

Fewer people are claiming a tax deduction for giving, but those who do are giving more

113.4b

Grants

Govt - $97b = 50% of funding to charitable sector. Giving structures = $16.4b

150b+

Gifts in Wills

Gifts in wills make up 20 of the largest 50 gifts in Australia. Ave gift = $60k + 6 x ROI

1.5b+

Corporates

Corporate giving is up 30% over last 5 years. Largest givers are BHP, Canva, Coles etc.

recent giving trends - Australia

There are three main sources of donations	Donations can be in different forms
 **People**	**Money and assets** In 2021, charities received **$13.4 billion** in donations
 **Estates**	**Goods and services** 77% of people donate goods each year
 **Organisations**	**Time** In 2022, **about 6 million** people formally volunteered

Some donors give directly, through giving vehicles (PAFs, PUAFs), giving groups (giving circles) or platforms (GiveNow)

NB: Ancillary funds have accumulated a pool of net assets that has grown from $4.6 billion in 2011-12 to $16.4 billion in 2020-21.

recent giving trends - Australia

- Small charities in Australia heavily reliant on donations (as opposed to govt funding etc) and volunteers
    - Charities with revenue under $250k receive about 40% of total revenue from donations on average
- Large charities – donations are concentrated in a small number of large charities, eg. in 2016 the largest 10% of charities received 94% of all donations

choosing your areas of focus

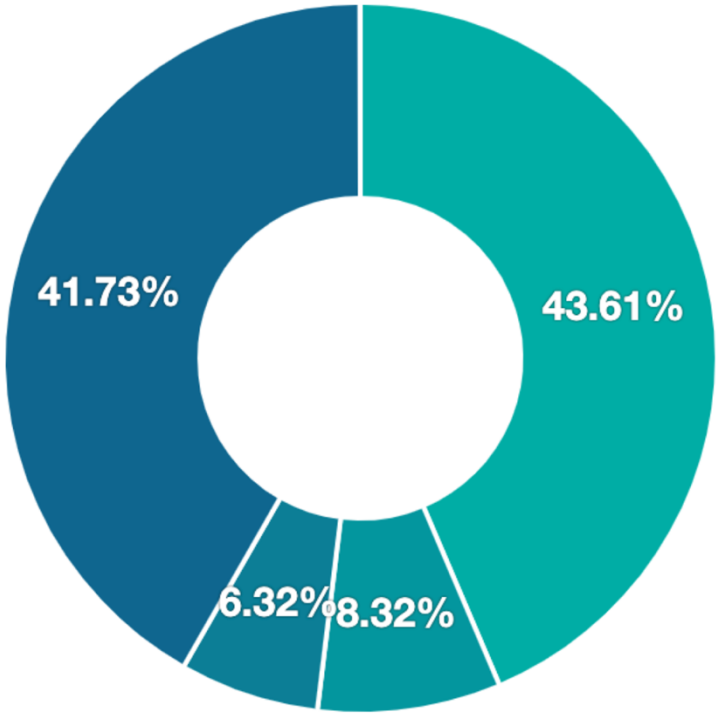
	$Value of Market Segment	Required Relationship Strength	ROI
Trusts and Foundations	High	High	Medium/High
PAFs / PUAFs	Growing	High	Medium
Gifts in Wills	Growing	High	High (25x)
Corporate	Medium	High	Low
Government	High	Low	Medium
One time donor	Low	Low	Low
Recurring donors	Medium	Medium	Medium
Mid tier donors	Medium	Medium	Medium
Major donors	High	High	High

where do you receive funding from?

(e.g. Carriageworks)

Revenue

Total revenue: $9,094,629.00



- Revenue from Government
- Other Revenue
- Revenue from Donations and Bequests
- Revenue from Goods or Services
- Revenue from Investments

Breakout 1: In groups, discuss:

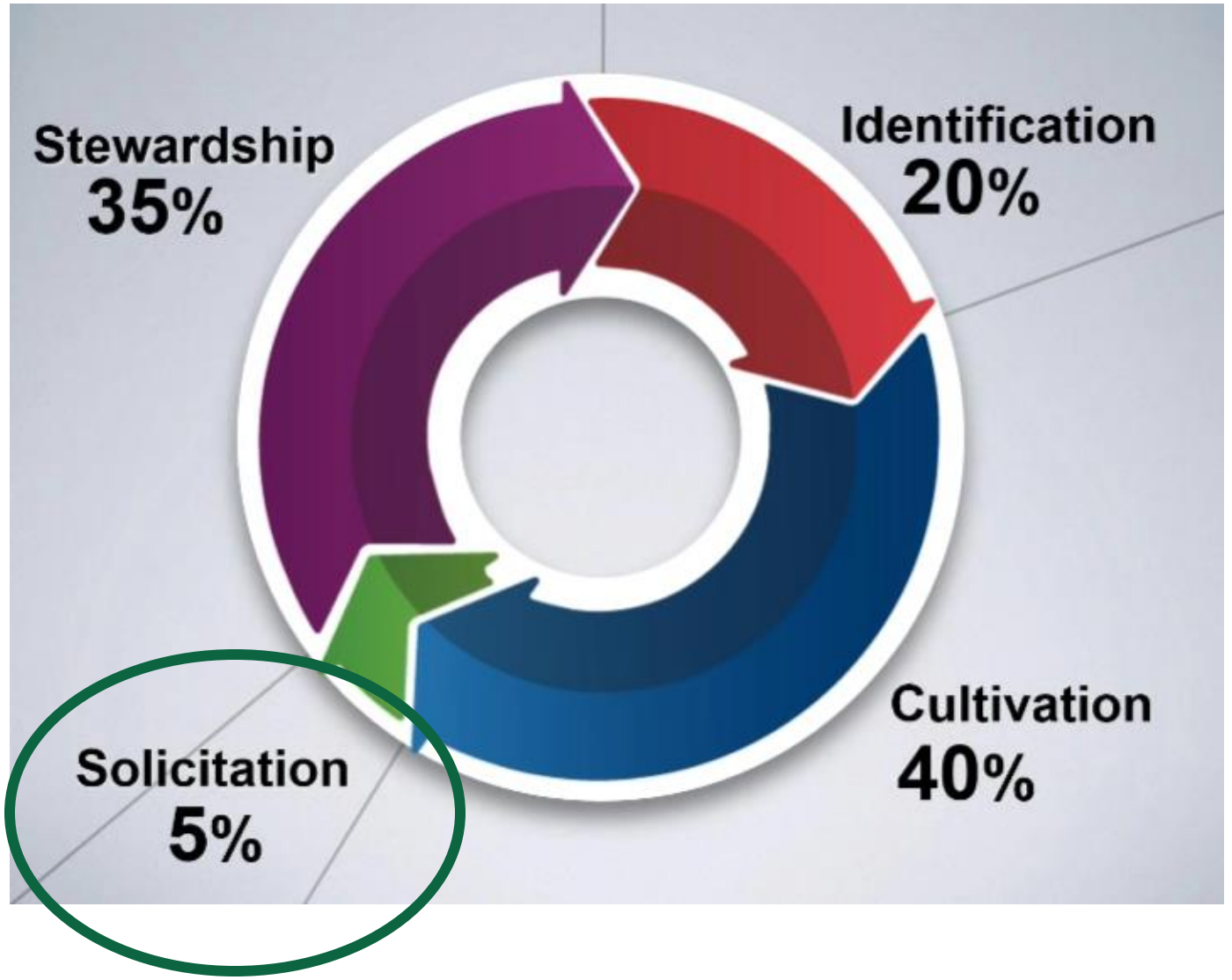
Where does your organisation receive funding from?

Which market segments do you want to attract more funding in from?

The Fundraising Process

”At some point, someone has to make the ask”

the fundraising process



What is a pitch?

- Formal presentation?
- One on one discussion?
- Coffee catch up?

- What tools do you need or can use to support these multiple formats?





What funders need to hear:

Aligning your pitch with their priorities

Preparation is key

Top Tips for a Winning Pitch

1.Lead with Your Most Compelling Story or Insight. Open your pitch with a powerful story, key data point, or human insight that captures attention and communicates the heart of your impact. Make the first minute count.

2.Start strong. Open your pitch with a powerful story, key data point, or human insight that captures attention and communicates the heart of your impact. Make the first minute count.

Preparation is key

Top Tips for a Winning Pitch

3. Tailor Your Pitch to Your Audience. Do your homework. Understand who you're speaking to—their values, priorities, and past giving. Then shape your message to resonate with what they care about most. A tailored pitch shows respect, insight, and strategic thinking.

4. Focus on What Matters Most. Keep it simple. Highlight the problem, your solution, and the impact you're creating.

Preparation is key

Top Tips for a Winning Pitch

5. Connect with Your Audience. Make it personal. Speak from the heart, maintain eye contact, and build genuine connection. Use slides / support material to aid—not lead—the conversation. You are the pitch.

6. Demonstrate Your Readiness and Credibility. Show you're funder-ready. Share indicators of organisational strength—strong leadership, clear strategy, sound finances, and good governance. Confidence backed by capability builds trust and invites investment.

Preparation is key

"The art of storytelling is incredibly important. Learning to tell a story is critically important because that's how the money works. The money flows as a function of the story." Don Valentine

Your CEO / Chair must be able to 'tell the story' in under 3 mins

Double down on your success if the whole board and staff can also tell one story - what is the story that is meaningful to them?

The Need

- Why is your organisation needed?
- What purpose is it serving?
- How do you meet that need?

Why Thread Together Exists

Thread Together addresses two problems:

1. Fashion industry is the second largest polluter in the world – one third of all new clothes go from factory to landfill.

2. Access to essential clothing, a basic human right - 1 in 8 adults and 1 in 6 children (or 3.4 million Australians) are living below the poverty line without access

The Purpose

Thread Together's purpose is to save new clothes from landfill and deliver these clothes to people in need.

Thread Together achieves its purpose by:

- diverting brand-new clothing from landfill, donated by fashion brands every day;
- providing wardrobes of clothing (each comprising 27-44 brand-new items) to thousands of Australians weekly.

We do this by…



EMPOWERING PEOPLE AND PROTECTING THE PLANET

"By collaborating with some of Australia's largest clothing suppliers, we are extending the life-cycle of clothing by keeping it in circulation.

We do this by partnering with charities and social service agencies to clothe individuals, families and communities in need, restoring dignity and providing hope to people doing it tough."

Breakout 2: In groups, discuss:

Why is your organisation needed?

What purpose does your organisation serve?

How do you meet that need?

Explain to the group and discuss.

Your impact

"No data without stories, no stories without data"

- Why should a funder give to you?
- What data can support your work?
- Case studies?

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Knowledge Connections Credentials

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Where not-for-profits go for help

Infographics are key…



Data is key…



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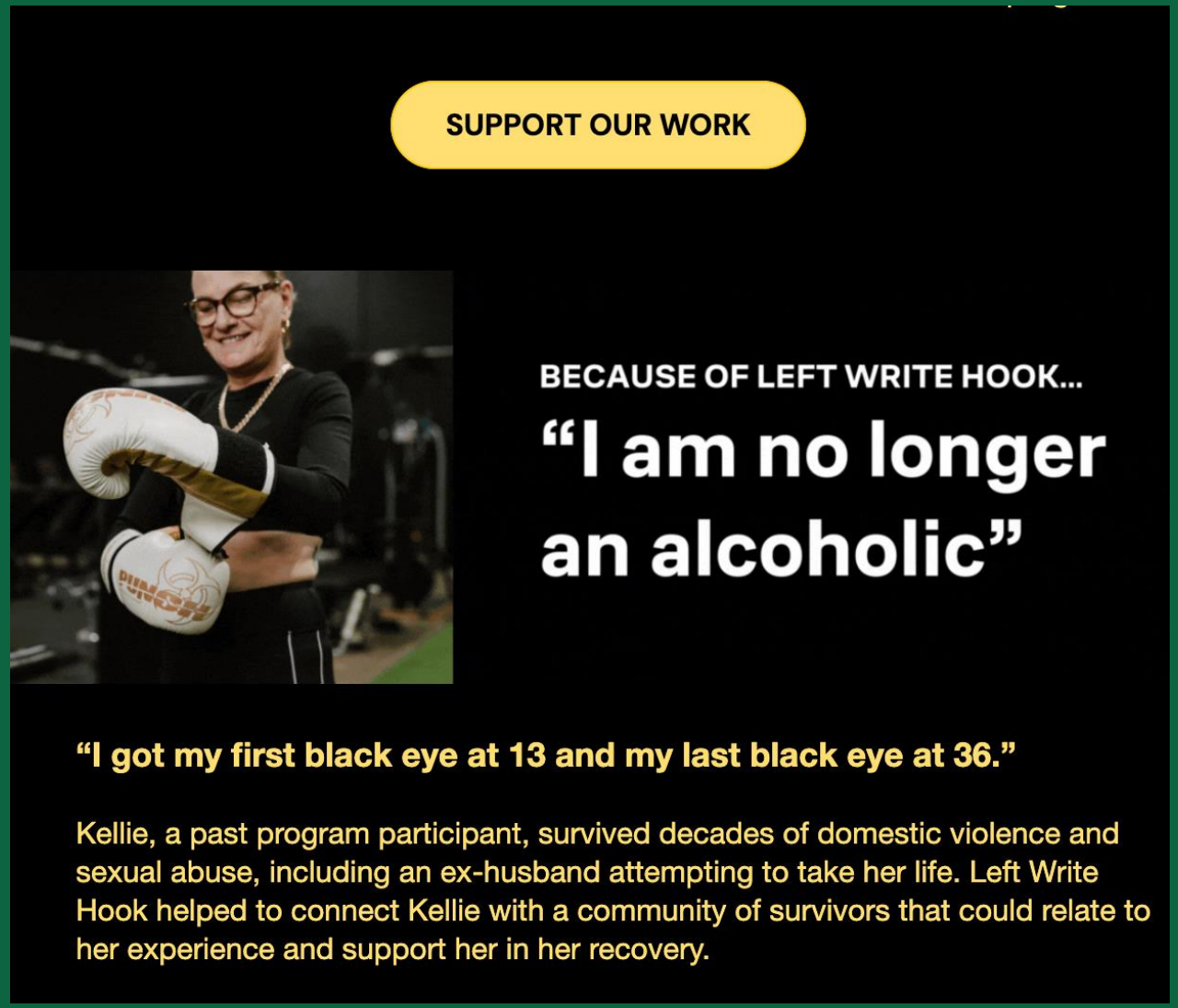
Case studies are key…



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Social Proof

We are all influenced by what we see others do and approve.

Testimonials from clients but also from other funders is key.

"Passion is infectious. Belief is irresistible." Phil Knight, Shoe Dog.

The Ambition

You need to be able to communicate your end goal, the big blue-sky ambition that excites funders, but also the practical – how their money can make a real difference to shift the dial.

“We supported the charity because we can touch, see and feel the positive impact they are having in the community” Funder

- Set out the how
- Where will their money go?
- What are your ambitions?

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Focus on Success

To bring it home, talk about success. Show your enthusiasm, your belief, your passion.

When you leave that meeting what do you want the funder to walk away thinking?
"That's a really tired CEO working really hard"!? Or
"That CEO has passion and conviction and will make stuff happen no matter what"

“Success breeds success – which leads to scale + messianic zeal for what you do”

Putting it all together

“Here’s one I prepared earlier”

Example Cases for Support



homework

homework

Worksheet 1

Who is your organisation?

What is the need for your organisation?

Start collating your case study / key story demonstrating impact on an individual

Start collating organisational data and case studies to showcase impact

Questions and check out

One key take out?

How do we feel about the homework?

Clear on next steps?