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Knowledge Connections Credentials

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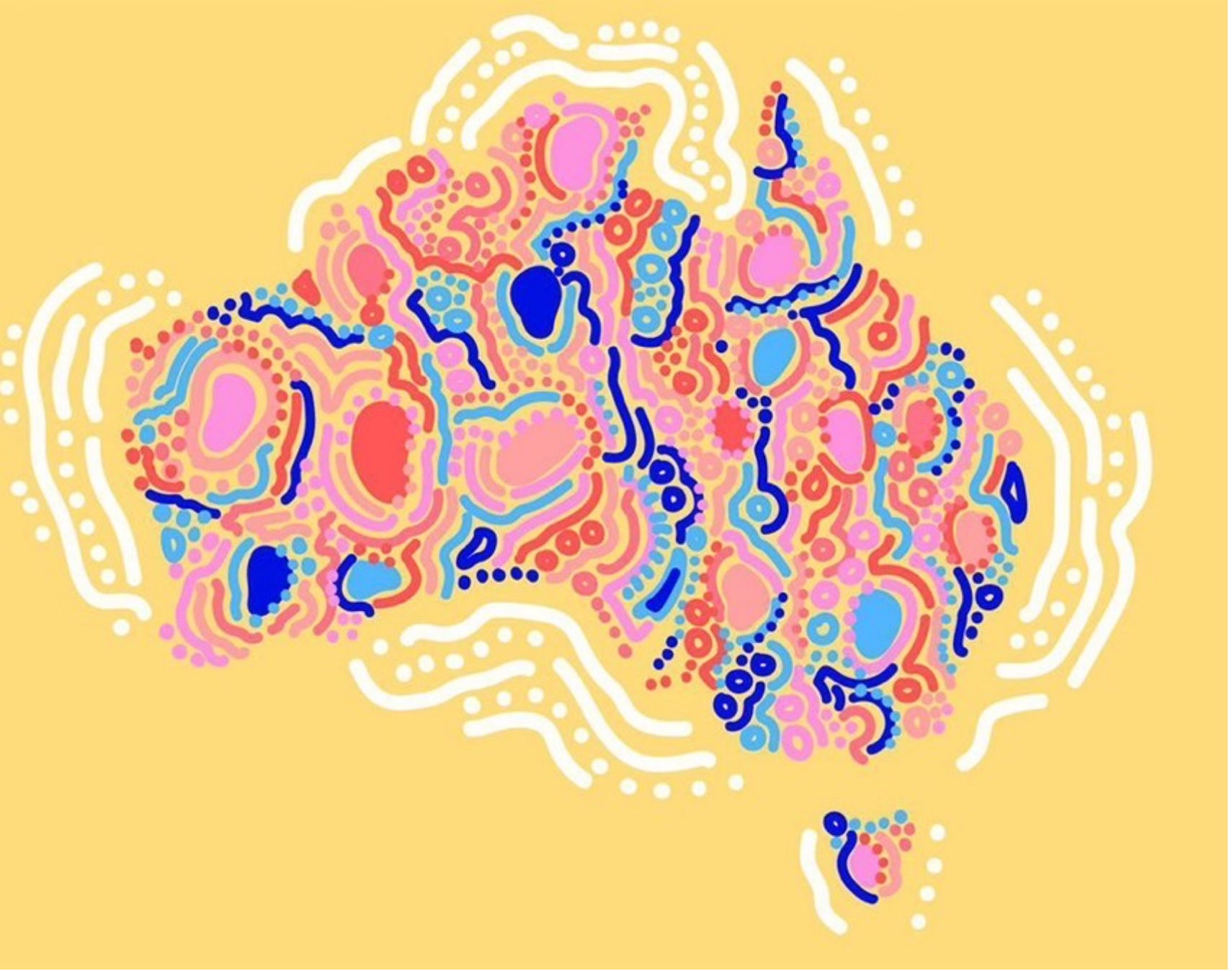
Where not-for-profits go for help

ADVANCED LEADERSHIP FOR CHAIRS

Institute of Community Directors Australia



Acknowledgement of Country

- Image from ABC iview
- Artworks by Arkie Barton

Program overview

Session 1: The chair as compass and wayfinder (Navigating with an ethical lens)
Jon Staley, ICDA Trainer

Session 2: The chairs relationship with the CEO
Sheena Boughen OAM, chair of the Australian String Quartet

Session 3: Backstage and front of house: using both to make good decisions
Jeremy Stowe-Lindner, educator and school principal

Session 4: Strategic funding: developing your case for support
Catherine Brooks, lawyer with expertise in strategic fundraising

Session 5: Strategic foresight for chairs: building for a future that's increasingly uncertain
Dr Dalia Ben-Galim, policy and strategy consultant

POLL

How important is increasing your organisational funding right now?

1. It’s our top priority and dominates most (if not all) board meetings.
2. We can always do with more funding but we are not desperate.
3. We are well-covered for the next 1-2 years but need a strategy beyond that.
4. We are flush with cash and have no need to think about funding!

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
- Certificate in AI in Fundraising and Marketing
  Non Profit Tech for Good
- Developing AI Strategy Course **RMIT**
- Donor – Geelong Community Foundation, Monkey B theatre company and Bridge It



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

Catherine Brooks

purpose & agenda

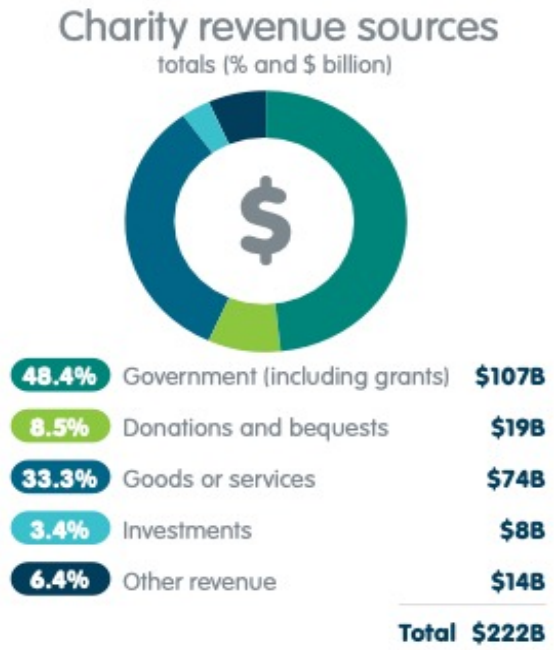
Purpose: To explore the role of the Chair and board members in attracting funding for your not-for-profit organisation

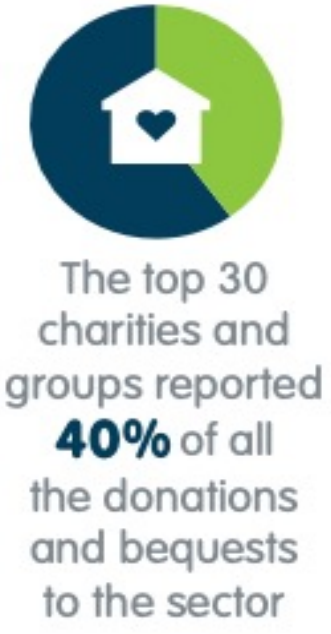
Agenda:

1. Role of the Chair in fundraising
2. How a Case for Support can make your life easy when it comes to funder engagement
3. The 6 T's of fundraising
4. Using your skills to support the CEO & organisation

Philanthropy in Australia

Total charity sector revenue was approximately **$222 billion** in 2023. From the **ACNC Australian Charities Report 11th Edition :**





$18.9 Billion

Donations and bequests grew to $18.9 Billion in 2023 (skewed by a mega-gift).

3.8 Million Volunteers

More than 3.8 million people volunteered with charities in 2023.

30% Extra-Small

Over 30% of all charities are extra-small (<$50,000 p.a.), receiving just 0.1% of Donations.

50% Deductions Top 1%

Almost half of all tax-deductible donations made by the top 1% earners.

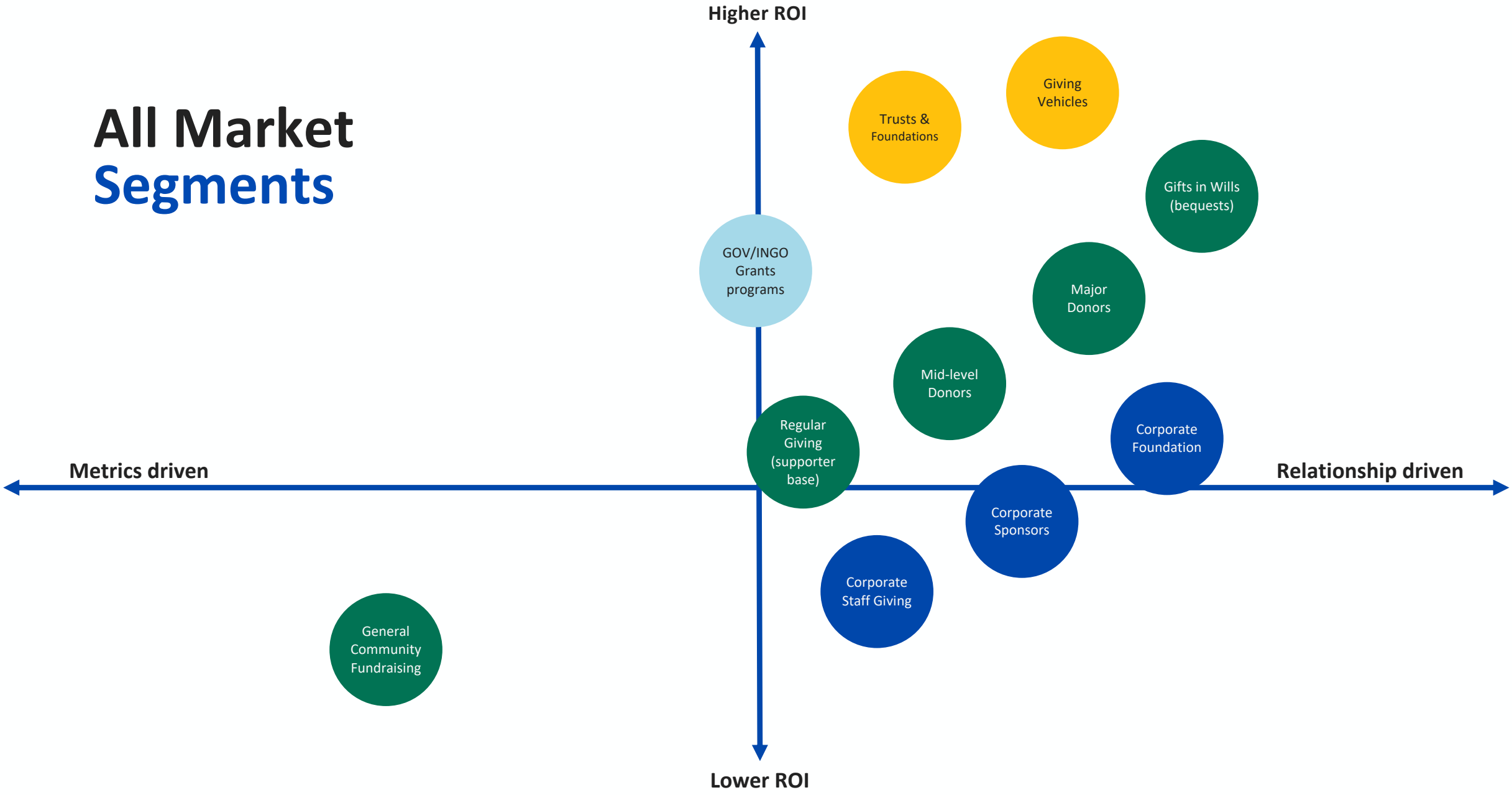
Australian
Recent Giving Trends

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 $120 billion in 2024.

All Market Segments



The Big Four
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 = $20b as at 2024



150b+

Gifts in Wills

Gifts in wills make up 20 of the largest 50 gifts in Australia. Ave gift = $84k + 6 x ROI



5b+

Corporates

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

DGR vs no DGR

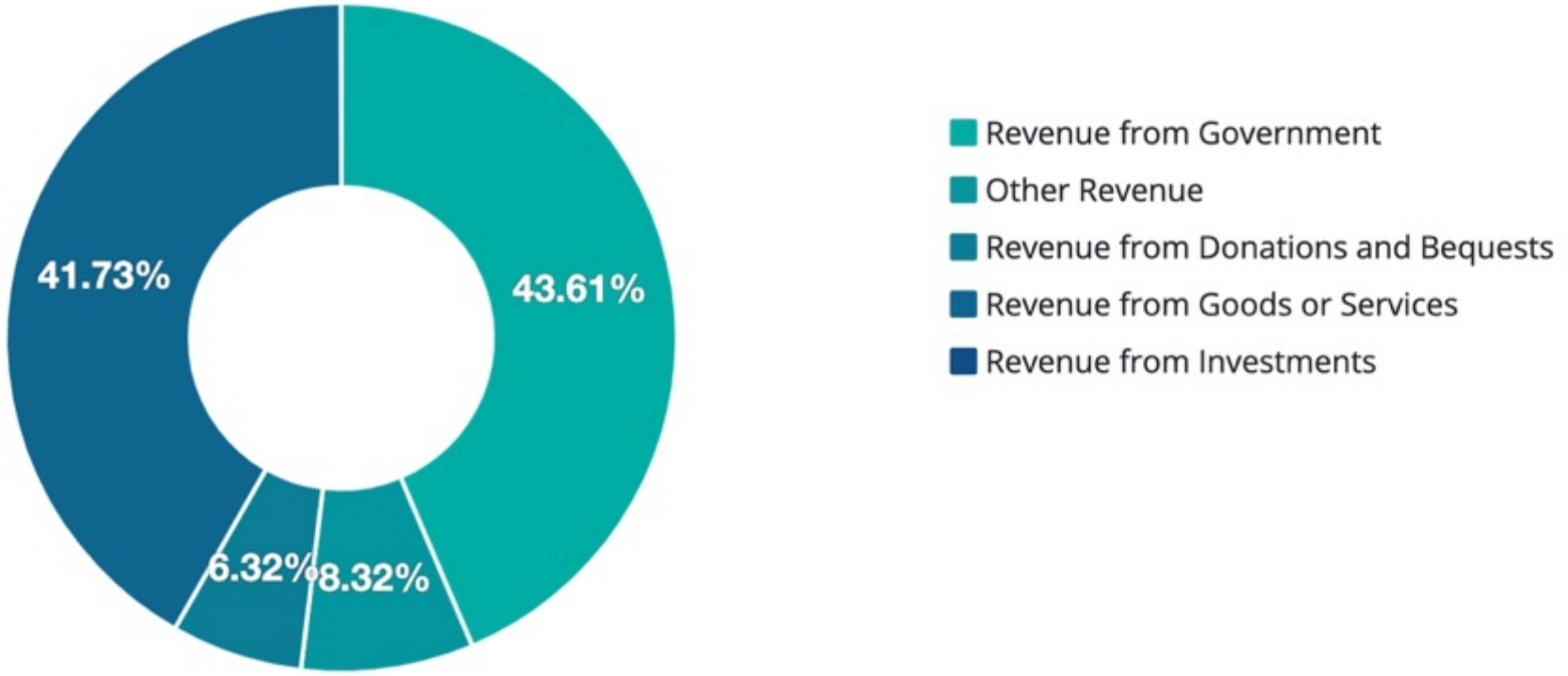
- You must have DGR to be able to apply for funding from trusts and foundations
- If you do not have DGR status, you can attract funds from individuals (but their donation won’t be tax-deductible) and you can accept gifts in wills

Breakout rooms

Break-out activity – review ACNC data

Revenue

Total revenue: $9,094,629.00



questions for discussion

In your breakout group, discuss …

1. How does your organisation current attract funding in? From which market segments?

2. How do your ‘competitors’ attract funding in? What could you learn from others about how they get funding?

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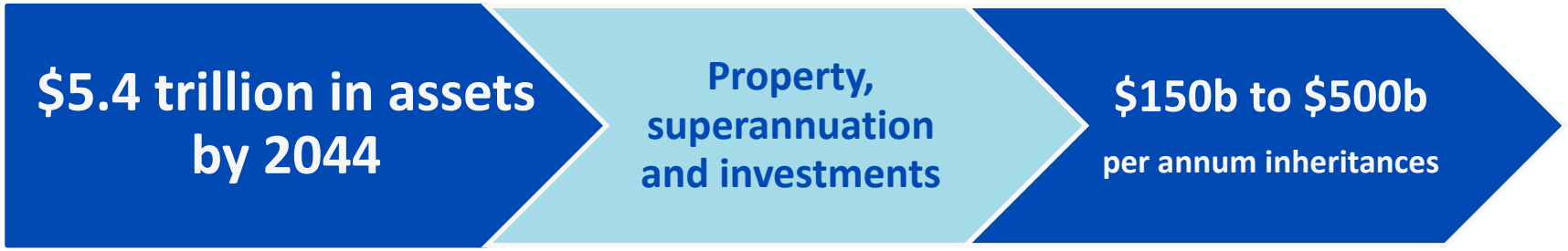
Positioning your organisation for the next wave of wealth

The Intergenerational Transfer of Wealth



The challenge for fundraisers

”Success will not come from waiting until wealth changes hands. It requires engaging with donors and their families now, while wealth holders are still living, and creating pathways that bring multiple generations into the conversation.”

Who is Shaping
The Wealth Distribution?



“Research also finds that women not only give to more charities and more frequently but also give larger amounts than men.”

- Mesch, 2010, Mesch et al., 2006.

Australian Women in our Economy

The landscape of HNW women in Australia is evolving. Australian women today are:

Highly educated, entrepreneurial, & participating in the workforce in far greater numbers

Women are accumulating their own assets and investments, and benefiting from the wealth transfer

Research by JBWere demonstrates that most are time-poor, place a premium on informed decision-making and investment performance

We need to "lay the groundwork for a future where women's contribution to wealth creation are acknowledged and fully supported". (Maria Lykouras, CEO, JBWere Australia)

Women Shaping the Future of Philanthropy



Women & the Great Wealth Transfer

Over the next decade, women in Australia are expected to **inherit and control 65%** of the estimated $5.4 trillion intergeneration wealth transfer ($3.2 trillion)

“Oldest Daughter Effect”

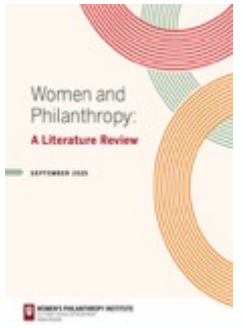
The oldest daughter is **50% more likely to** be entrusted with managing the family estate compared compared to other siblings

Growth of Female Wealth

New female millionaires growing at 5.7%, compared to males 3.6%.

Women now own **one third** of Australia’s small businesses.

What Motivates Female Donors



- Women score higher on **empathy and prosocial behaviour measures linked to giving**
- More likely to give based on **values and personal connection**
- More likely to **research and engage before giving**

Female-headed households

more likely to give than male-headed households (Women Give 2010)

Single women

give more than single men when controlling for income & wealth

Baby Boomer women

more likely to give and give larger amounts than male counterparts (Women Give 2012)

Married women

drive household giving decisions — when one partner decides, it is more likely the wife

The Experience Gap



Many women are not disengaged, they are under-engaged

- Engagement often feels **transactional, not relational**
- Limited opportunities for **participation, voice, or connection**
- Traditional models don't reflect how women **want to engage with giving**

64%

of women nationally

want to increase their charitable giving

80%+

of women in philanthropic networks

say they want to give more

60%+

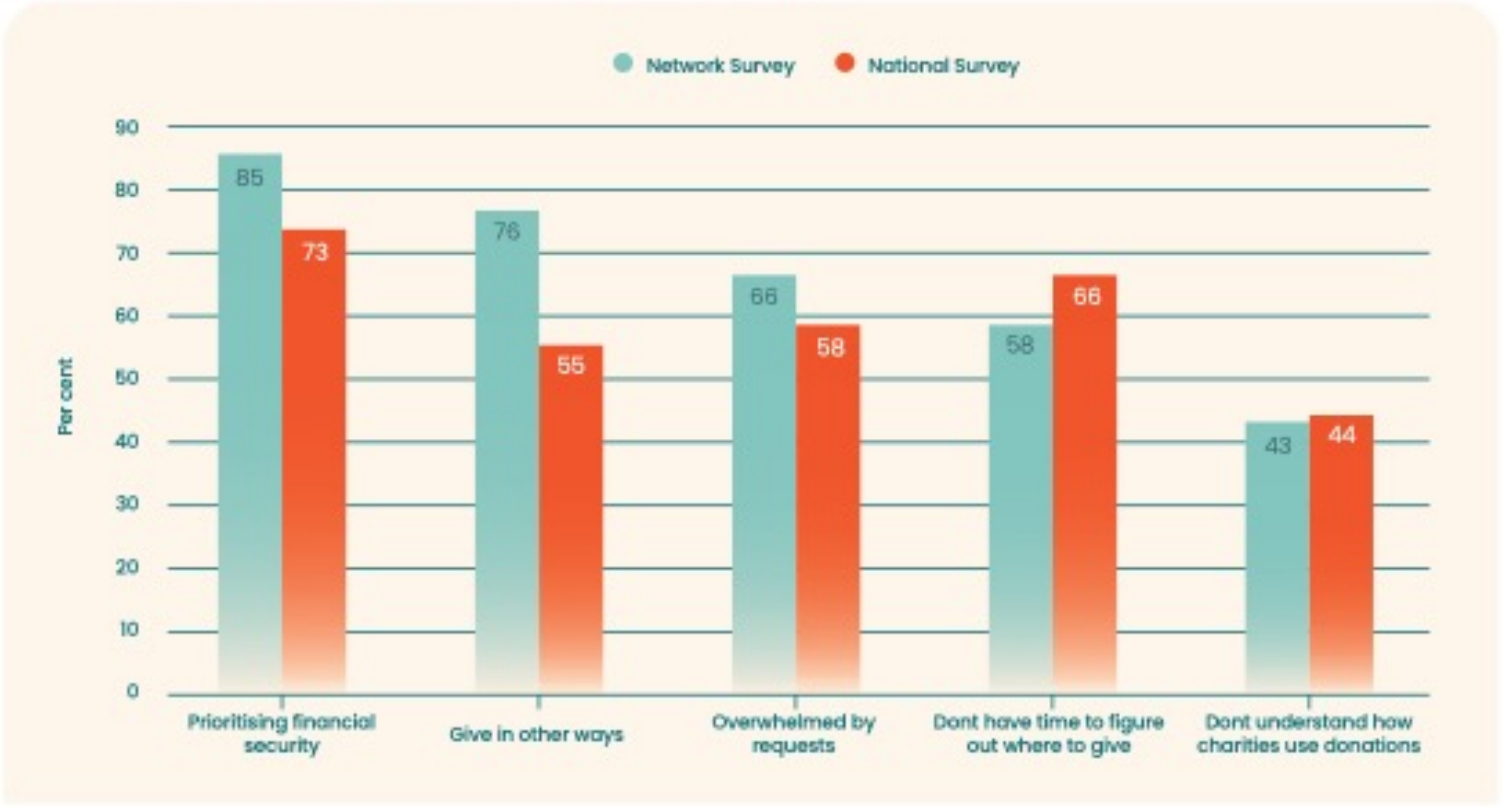
of partnered women

always or usually make household giving decisions

Barriers for Female Giving



Figure 9: Main barriers to giving – Network and National surveys



- Lack of visibility & recognition of women as philanthropists
- Confidence limitations and perceived expertise gaps
- Gaps in networks and peer connections
- Absence of tailored engagement opportunities
- Financial security concerns and decision fatigue

Key learnings from Equitable Philanthropy

- Many women want to give collectively / collaboratively BUT some women don't want it to be in an exclusively female setting – ask your donors what they want
- Survey current and prospect donors to ask them – what events and activities do they like attending?
- Consider partners / multi-generational settings and events
- Money can't buy experiences
- Why would someone give up their time to attend an event or join a donor circle?
  - How do you offer joy and fun?





Breakout rooms

questions for discussion

In your breakout group, discuss …

1. How could your organisation position itself to attract funds in from the intergenerational wealth transfer?

2. How might you better engage women in your supporter base?

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The Chair – a not-for-profit's greatest fundraising asset

three things funders look for

1. Who is on your Board? Particularly, who is the Chair?
2. Who else has funded you?
3. Your impact

Funding is all about relationships.

People fund people.

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When board members help, organisations raise more

why is this?

- Knowing someone on the board or having a relationship with a board member is the No. 1 reason major donors listed for deciding on who to give their money to (JBWere 2018)
- Community influence
- Board member interactions carry more weight
- They bring a range of experiences & skills

Leadership & Board
Fundraising Roles

1

Board Buy-In

Fundraising works best when the Board is aligned and actively backing the strategy.

2

Fundraising Support

Board members add value by opening doors, showing up, and supporting the team behind the scenes.

3

Key Role

An engaged Board signals credibility and tells funders the organisation is investment ready.

The Six T's of Board Fundraising



#6 Trust

Communicate and build trust re strategy, leadership, delivery of programs, impact, etc

#1 Talent

Contribution of your own unique talent

#5: Testimony

Ability to spread your message and endorse your work

#2 Time

Engage with supporters, funders, and donors

#4 Ties

Capacity to leverage own networks and connections

#3 Treasures

Contribution of your own monetary and in-kind gifts

Breakout rooms

questions for discussion

In your breakout group, discuss …

1. How could you now bring the six t's of fundraising to your Board and integrate that into your board roles?

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Pitch material to support board members

pitch material

You need to be able to clearly articulate:

- Who you are as an organisation
- The need that you meet
- What more you could do with additional funding

why is it important to prepare?

"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

The 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 one story of success

What's one story of success that you can speak to that the funder will remember and be able to repeat back to trustees / decision-makers?

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

the foundation of a good pitch

"The public praises people for what they practice in private"

The best public speakers practice 90 hours for every hour they are going to be on stage (!)

Tennis ball analogy – throw someone 5 tennis balls at once and they catch none, throw them one and they catch it. Hone your pitch and stories.

Keep. It. Simple. Then practice it.

steps to engage with funders

1. Send Case for Support
2. Practice the pitch – what are the top three things you want the funder to understand? How can you do that with one story?
3. Initial meeting
4. Follow up email and / or additional meeting
5. Submit grant applications/formal request for funding
6. Keep the relationship going – eg. regular emails with updates on the organisation (thank you, milestones, media, …)

Breakout rooms

questions for discussion

In your breakout group, discuss …

1. What's one key takeout you've learnt today?

2. What's an action you can take based on today's discussion?

    - Eg. Can you ask a current funder for a letter of support?
    - Do you have that one story that resonates with you that you can speak to?
    - Can you implement the six t's of fundraising at Board level?

Questions?

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Thank you.

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Useful resources:
https://equitablephilanthropy.substack.com/p/the-resource-shelf