

Reimagining Trusts and Foundations Fundraising

PHILANTHROPY & PARTNERSHIPS TRACK

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Macquarie University



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Philanthropy & Partnerships
Track

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Acknowledgement of Country

We acknowledge the Turrbal and Jagera peoples of the Meanjin the Traditional Owners and custodians of the lands on which we are meeting today, and pay our respects to their Elders past and present.



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Dispelling common myths



T&Fs don't need their own strategy



Income raised is the only measure of results



Fundraising is just the job of fundraisers



Grants aren't worth the effort



Individual major donors should be the top priority



Relationship development isn't relevant to T&Fs

Introducing the Team and Topics for Today

- **Building a strategy**
 - Strategy design and consultation
 - Using data to track performance

Manasi Kogekar
Senior Development
Manager,
Trusts and Foundations



- **Building a culture**
 - Internal capacity building
 - Communicating with purpose

Beppie Keane
Development Manager,
Trusts and Foundations



- **Building a pipeline**
 - Stewarding donor relationships
 - Cultivating new opportunities

Courtney Sullivan
Development Manager,
Trusts and Foundations



Proof that we know what we're talking about



Increased grants from new local and international donors



New gifts from existing donors



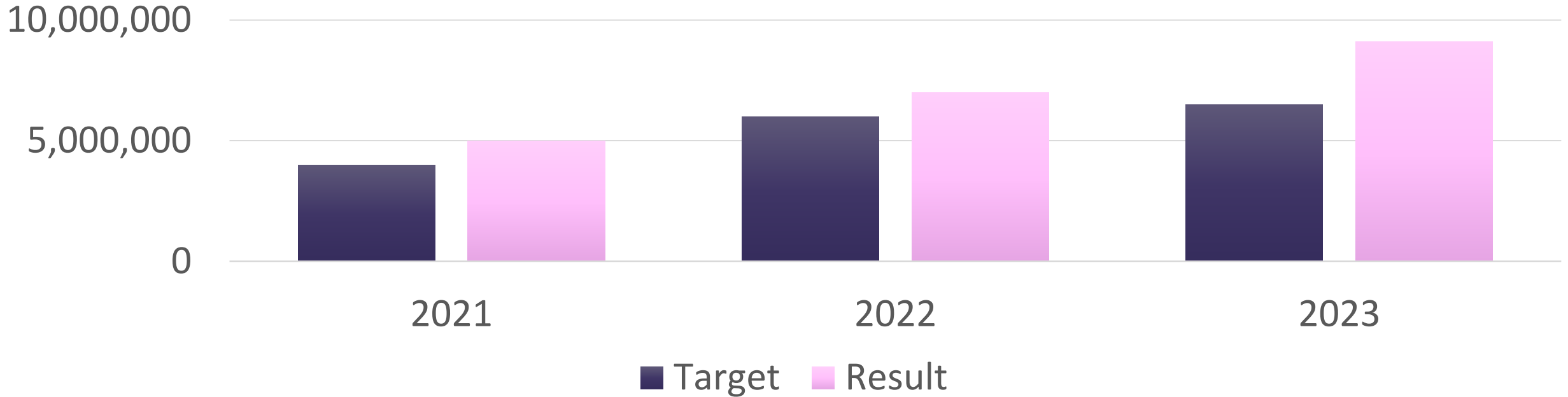
Increased visibility of philanthropy across the university



Exceeding income targets

Even more proof that we know what we're talking about

T&F Income





Myth: Trusts and Foundations don't need their own strategy



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Strategy design and consultation



Analysis of strengths, weaknesses, opportunities and threats



Historical income analysis



Review of organisational strategy documents



Research on trends in philanthropy in Australia and internationally



Consultation with stakeholders both within and outside the T&F Team

Operationalising the strategy



Cultivation of local and global prospects



Growth of existing relationships with T&F donors



Strengthening the culture of philanthropy across the organisation



Optimising data and processes to deliver the T&F program



Myth: Income raised is the only
metric we should use to measure
fundraising results

Operationalising the strategy

Cultivation of local and global prospects

Identify new prospects

Develop cultivation plans for new prospects

Apply for grants from new prospects

of new prospects identified

of meaningful touchpoints with new prospects

of proposals submitted to new prospects

\$ raised from new prospects

Using data to track our performance

Trust & Foundations KPI Tracker Report

As at December 8, 2023



Metrics	YTD Q1	YTD Q2	YTD Q3	YTD Q4	YTD Total	Yearly Target	% Achieved
Number of new prospects identified	9	7	7	13	36	60	60%
Number of touchpoints with new prospects	2	4	4	11	15	50	30%
Number of proposals submitted							
- new donors	8	12	7	21	48		
- existing donors	14	5	4	6	29		
- total	22	17	11	27	77	80	96%
Funds Raised \$							
- new donors	\$318,563.75	\$1,081,961.45	\$0.00	\$422,756.17	\$1,823,281.37		
- existing donors	\$1,538,849.47	\$4,650,975.36	\$68,076.83	\$945,545.67	\$7,203,447.33		
- total	\$1,857,413.22	\$5,732,936.81	\$68,076.83	\$1,368,301.84	\$9,026,728.70	\$6,000,000.00	150%

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Myth: Fundraising is just the job of fundraisers



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Building a culture of philanthropy



Stakeholders

Non-fundraisers with academic background



Institutional

Existing focus on purpose



Communication

Multi-level approach



Engagement

Starts from within

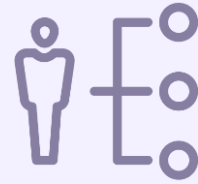


Myth: Applying for grants is too competitive and not worth the effort.

Building capacity



Grant scheme insights and guidance



Advice on donor engagement



Professional development activities



Resources

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Celebrating success



Fireside chats



Social media



News stories



Showcases



Myth: Relationship development
isn't relevant to Trust and
Foundations fundraising



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Building Relationships



Have a conversation



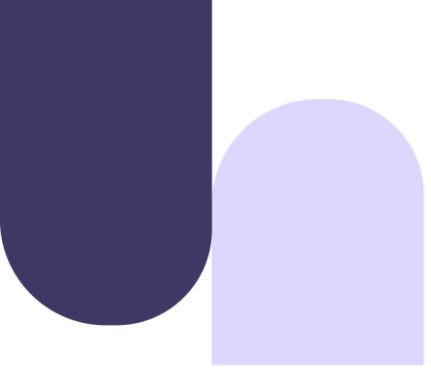
Spontaneous outreach



Bring in the expert



Relevant content to communicate



Myth: Individual major donors
should be the top priority



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Cancer Biobank and Clinical Trials – Funded by Love Your Sister Foundation



Met donors needs and reported back



Multiple anchor points across the University



Listened to their priorities and presented new ideas



Incremental growth \$750K
first gift \$1.2m second gift

Inflammatory Bowel Disease (IBS) Clinical Trial- Funded by McCusker Charitable Foundation



Initial outreach unsuccessful



Timely response when Foundation made contact 6 months later



Connection with the cause – identified project and researcher



Scalable
\$800K, with strong chance of further funding

Public Health grants— Ian Potter Foundation



Existing donor and meeting
IPF needs



New project required
development



Community support and
stakeholder buy in



Sustainable once funding
ends

Meaningful stewardship

What we would like donors and prospects to say....



I'd love to come!



Thank you for your report



Let's schedule a meeting



Ooh, that was really interesting!

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Bringing it all together – let's discuss

Building strategy:

Strategy design and consultation

Using data to track performance

Building culture:

Internal capacity building

Creating a pathway for engagement

Building pipeline:

Stewarding donor relationships

Cultivating new opportunities

**FIA
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2024

Thank you



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