

ADVANCED LEADERSHIP FOR CHAIRS

Institute of Community Directors Australia

Yarra River
Birrarung (river of mists)
Wurundjeri Woi Wurrung Country



Program overview

- **Strategic foresight for chairs: building for a future that's increasingly uncertain**
 - Dr Dalia Ben-Galim, policy and strategy consultant (Wed. 22nd Oct)
- **Backstage and front of house: using both to make good decisions**
 - Jeremy Stowe-Lindner, educator and school principal (Wed. 29th Oct)
- **The Chairs relationship with the CEO**
 - Sheena Boughen OAM, chair of the Australian String Quartet (Wed. 12th Nov)
- **Ethical board leadership workshop**
 - Jon Staley, ICDA Trainer (Wed. 19th Nov)
- **Strategic funding: developing your case for support**
 - Catherine Brooks, lawyer with expertise in strategic fundraising (Wed. 26th Nov)

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 a Case for Support and of your board members in attracting funding for your not-for-profit organisation

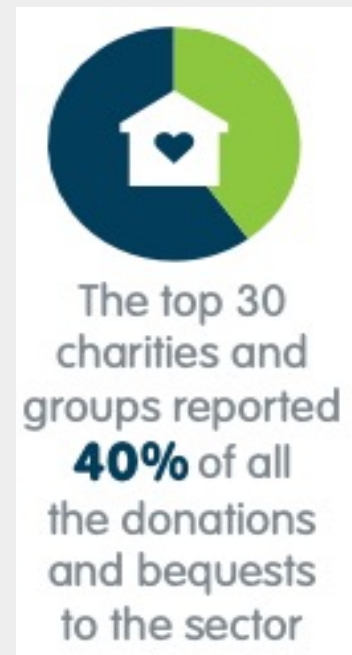
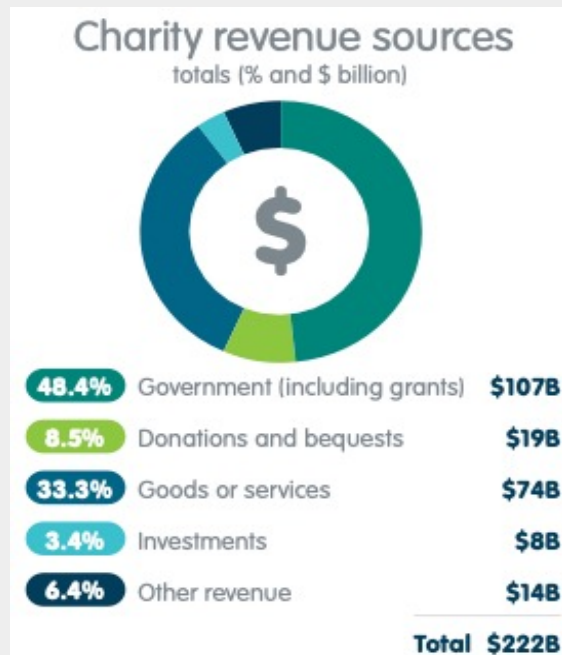
Agenda:

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. Preparing for and honing your pitch for maximum impact
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

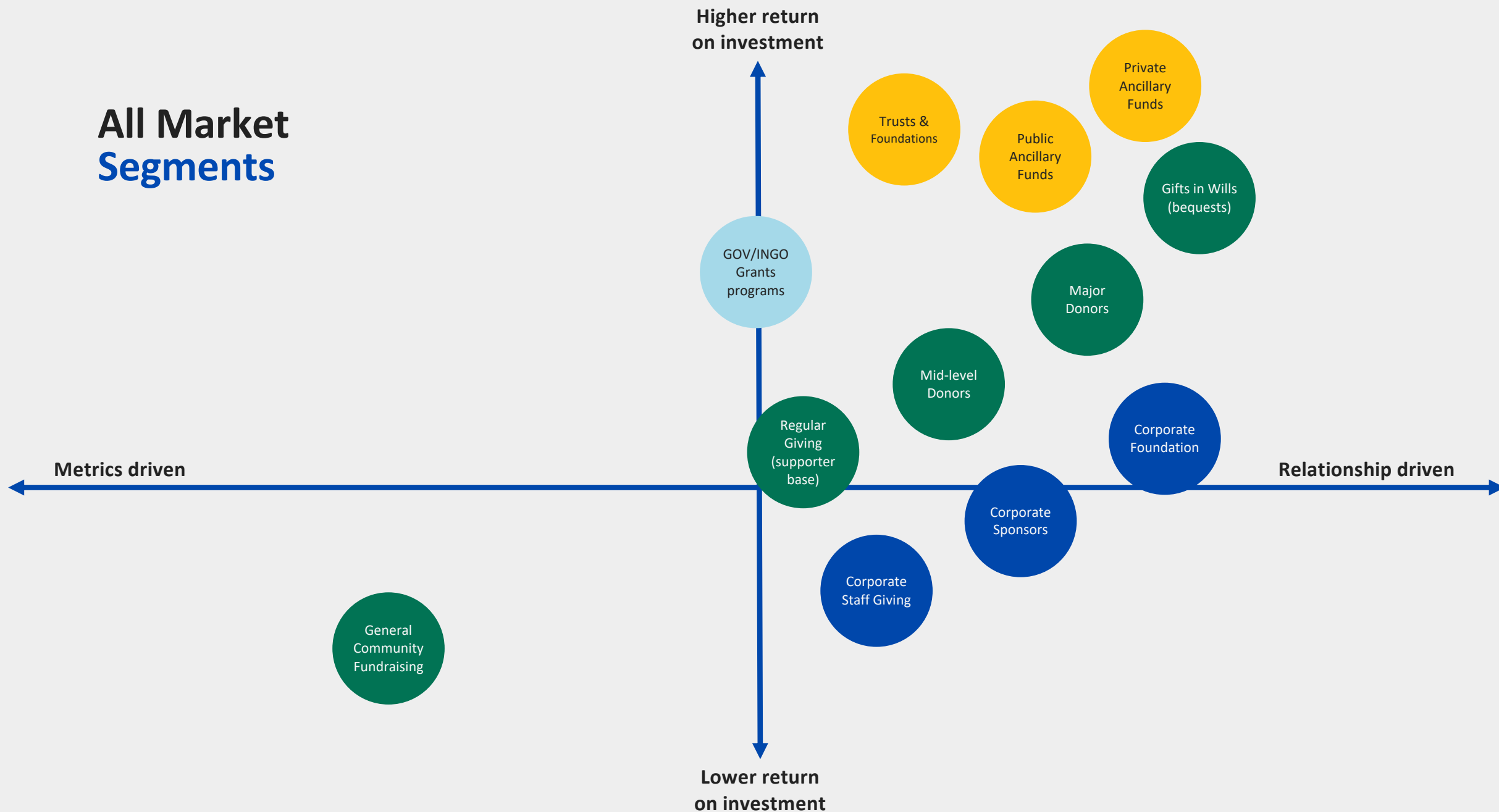
Over 30% of all charities are extra-small (<\$50,000 p.a.), receiving just 0.1% of Donations.



50% Deductions Top 1%

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

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 = \$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

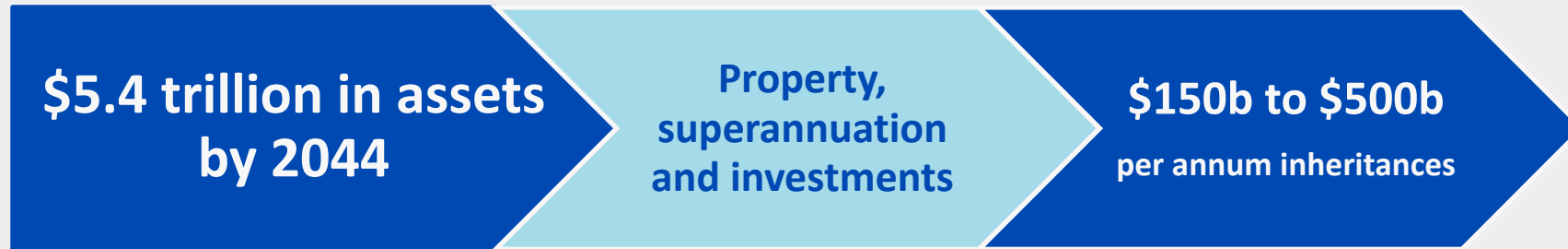


5b+

Corporates

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

What is transferring?

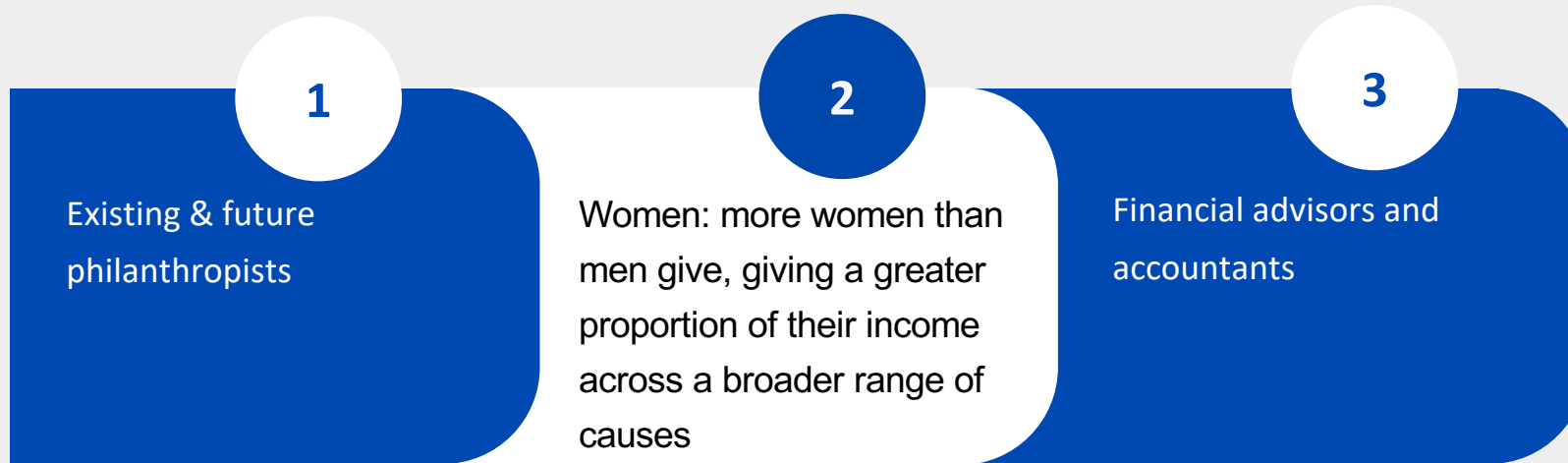


The challenge for fundraisers

"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 how the wealth is distributed?

The key players



“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).”

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

Small charities in Australia are 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

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 **Area of Focus**

	\$ Value of Market Segment	Required Relationship Strength	ROI
Trusts & 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

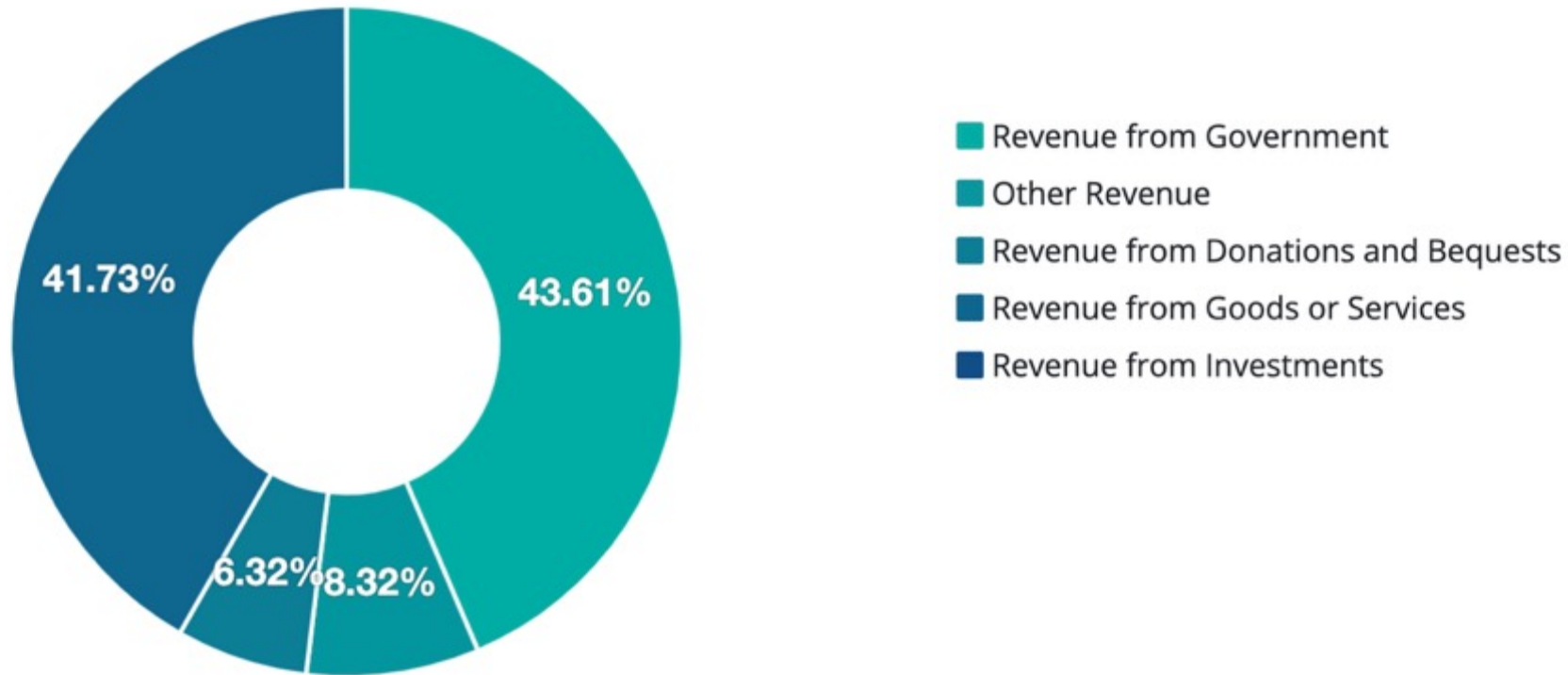
DGR vs no DGR

- 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

where do you receive funding from? (e.g. Carriageworks)

Revenue

Total revenue: \$9,094,629.00



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.

questions for discussion

Where do you currently have potential funding or partnership relationships?

What are the next steps to increasing funding opportunities in those areas, or with those people?

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

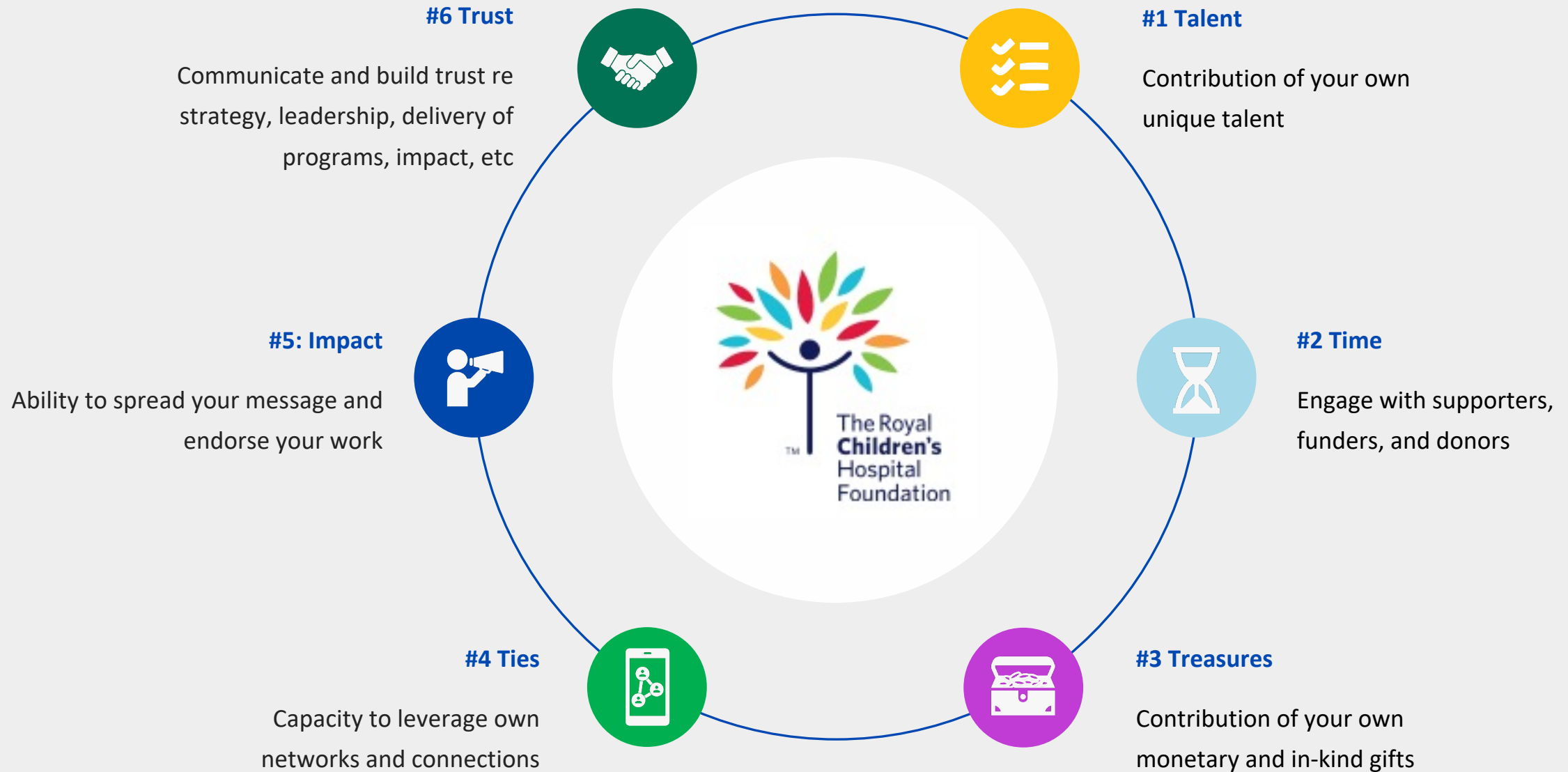
Board members add value by opening doors, showing up, and supporting the team behind the scenes.

3

Key Role

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

The Six T's of Board Fundraising



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

how to perfect your funder pitch

1. Why is preparing for a pitch important?
2. The foundation of a good pitch
3. Steps for engaging with funders
4. Pitch session - best case structure

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?

Prepare your story

First establish the need – why is your organisation needed?

2. 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

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.

• [United Nations Environment Programme \(UNEP\)](#)

• [Poverty in Australia 2020: A National Perspective, Australian Council of Social Service \(ACOSS\)](#)

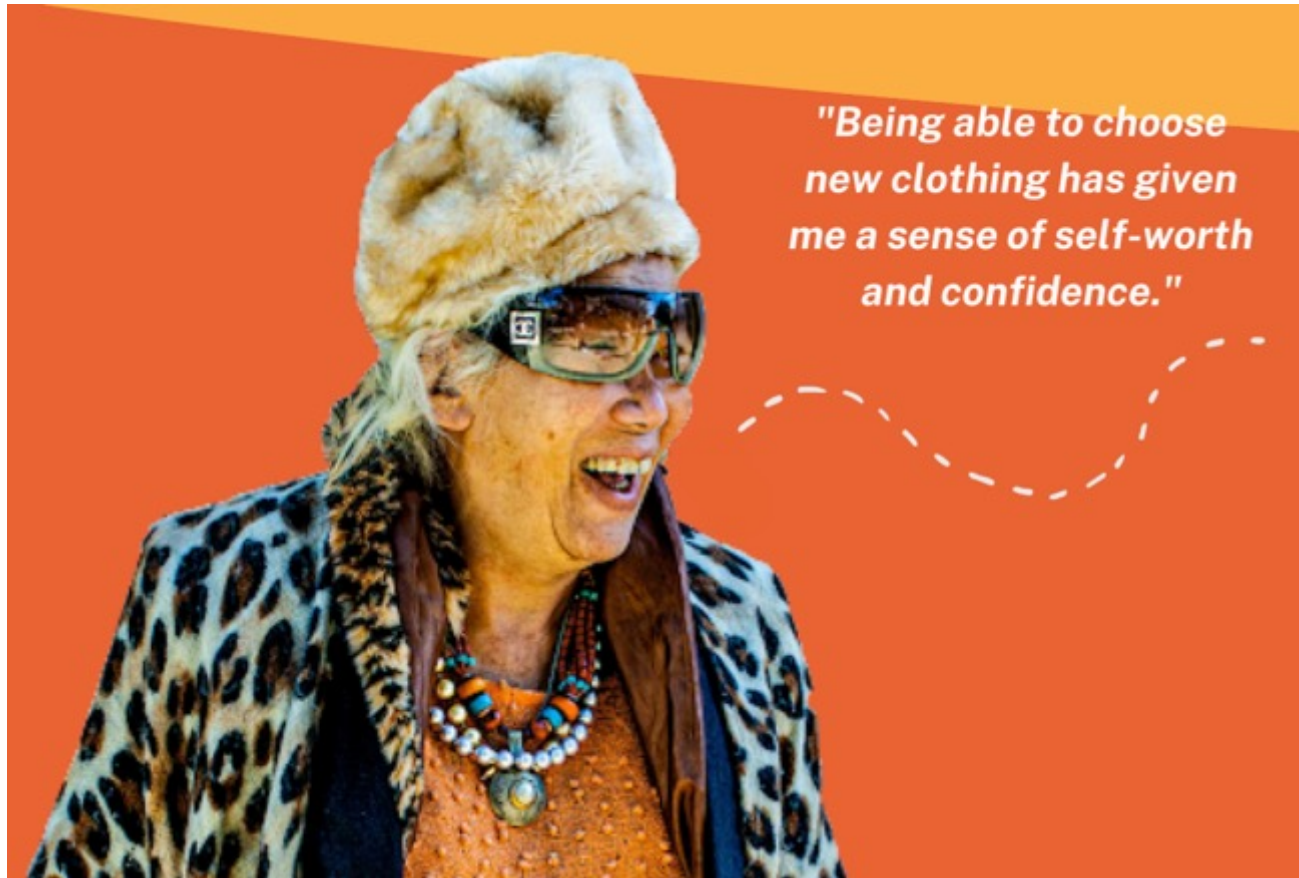
Prepare your story

Second, set out how you meet that need.

"We divert brand new clothing from landfill and provide it to those in need of clothing."

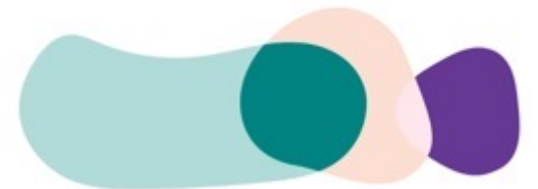
Prepare your story

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."



Prepare your story

KEEPING CLOTHING IN CIRCULATION



1,000+

*FASHION PARTNERS
DONATING CLOTHING*



1,500+

*CHARITY PARTNERS
ACROSS AUSTRALIA*



5,503,497

*ITEMS SAVED FROM
LANDFILL*



2,500

*PEOPLE IN NEED
CLOTHED EACH WEEK*

Prepare your story

Third, set out the impact that you have when you meet that need.

Why should a funder give to you? Set out how you help with data and case studies.

OUR IMPACT

Recent changes to social security law, policy and administration we have contributed to achieving:

DOMESTIC VIOLENCE AND CENTRELINK

Our 2018 report '[How well does Australia's social security system support victims of domestic violence?](#)' led the government to make policy changes to better support victims of domestic violence.

Our advocacy following the release of our 2021 report, [Debts, Duress and Dob-ins](#), has led to the inclusion of social security in the new [National Plan to End Violence against Women and Children 2022-2032](#).

The Senate Committee report on the [Fair Work Amendment \(Family and Domestic Violence Leave\) Bill 2022](#) cites our [recommendation](#):

'Increasing income support payments so women without stable employment (and access to paid FDV leave) can still have the financial security to leave abusive relationships.'

Prepare your story

Finally, set out the how – how can people help and support you?

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.

Prepare your story

Our project goal is to maximise access for women at risk of or experiencing domestic violence

5 workshops: 100 domestic and community violence workers to help their clients

Our project will benefit up to 4000 women: We will train 100 community workers, who in turn each year support approximately 40 women and their children to access income support, leave domestic violence situations and stop ongoing financial abuse.

+ + + Our project will also reduce the burden on social services and will have long term benefits, particularly for children. Financial security enables women to leave violent relationships, secure housing, feed and clothe their children and pay their bills, all of which improves their wellbeing and securing their future. This reduces their reliance on other homeless and mental health services, and vitally, diverts families away from the child protection system.

*"I feel more capable
of helping people
with Centrelink"*

**94% of recent
Community Legal Education
participants agreed.**



<https://welfare-rights-centre.org.au/our-impact/>

Prepare your story

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"!

Prepare your story

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.

Payments for a worried mum.



Vahida, a nurse from Pakistan, arrived in Australia following an arranged marriage with an Australian citizen.

Violence against her and her child.

Ineligible for public housing as she was not receiving a social security benefit. Vahida was rejected by Centrelink because of waiting periods that apply to people newly arrived in Australia.

Welfare Rights Centre was able to help Vahida demonstrate that her circumstances were outside of her control, which meant she could be entitled to a Special Benefit.

Granted a Special Benefit and arrears from the date of her original claim.

Vahida secured public housing for herself and her child and with the arrears of payment she was able to buy a new pram and other essentials for her child.

Vahida and her child are now safe and she can afford to pay for food and bills. Can now plan for nurse registration.

The foundation of a good pitch

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, ...)

best practice structure of a pitch session

1. Welcome and introductions – the not for profit should lead this - start with a thank you – thank you for the time or thank you for the support given in the past
2. If funder amenable, CEO or Chair to give brief 5 mins overview
3. Funder to ask questions – two-way dialogue should then happen for the majority of the meeting
4. CEO and / or Chair to ask funder open ended questions such as:
 - What are the areas that you're looking to support this FY?
 - Have you funded another organisation where you are really impressed with the CEO or Chair and think I could meet with them to learn?
5. Lock in next steps – would you like more information on x? Would you mind if we circle back in a couple of weeks? Clarify your understanding of any open grant rounds etc.

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 now develop your presentation (powerpoint or otherwise) to use to speak to funders?
3. Based on today's discussion, how are you going to develop your pitch internally and externally?

Questions?

Thank you.

Catherine Brooks
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Useful resources:

<https://equitablephilanthropy.substack.com/p/the-resource-shelf>

Reflection:

1. What stood out for me in each topic?
2. How does it connect to my role as a Chair

Think about the Chair you want to be in 12 months time

What is one step that you can take to move towards that?



Advanced Leadership for Community Chairs - Feedback



<https://www.surveymonkey.com/r/2025ALCC>