

ADVANCED LEADERSHIP FOR CHAIRS

Institute of Community Directors Australia

Wurrundjeri
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
- Backstage and front of house: using both to make good decisions
 - Jeremy Stowe-Lindner, educator and school principal
- Strategic funding: developing your case for support
 - Catherine Brooks, lawyer with expertise in strategic fundraising
- The Chairs relationship with the CEO
 - Sheena Boughen OAM, chair of the Australian String Quartet
- Ethical board leadership
 - Facilitated by Jon Staley, ICDA Trainer

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!

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Wendy Brooks

& partners

**Advanced Leadership for
Community Chairs**

Strategic funding: developing your
case for support

August 2023



acknowledgment of country

We acknowledge the Traditional Owners of Country throughout Australia and their continuing connection to land, sea and community.

Nyurra wurriyn (Wadawurrung)

We also acknowledge that sovereignty has never been ceded and coexists with the Crown's sovereignty today. That sovereignty comes from a different source to the sovereignty claimed by the Crown: from the ancestral tie between the land and its people, but still means that First Nations' *inherent* rights cannot be ignored.

Always was, always will be Aboriginal land.

We pay our respect to First Nations, their culture and their Elders past, present and future.

introduction



Catherine Brooks, BLAA, AMICDA *(she/her)*

Senior Advisor, Wendy Brooks & Partners

Council Member, Institute of Community Directors Australia

Accredited Specialist, Workplace Relations @ LawSquared

Board Member & Donor, Her Place

Committee Member & Donor, Geelong Community Foundation, P500


purpose & agenda

Purpose: To explore the Chair's role when it comes to attracting funding for your not for profit

Agenda:

1. Role of the Chair and Board in fundraising
2. How a Case for Support can make your life easy when it comes to funder engagement
3. Case studies – chairs working hard in their board role to support fundraising efforts
4. Using your skills to support the CEO & organisation

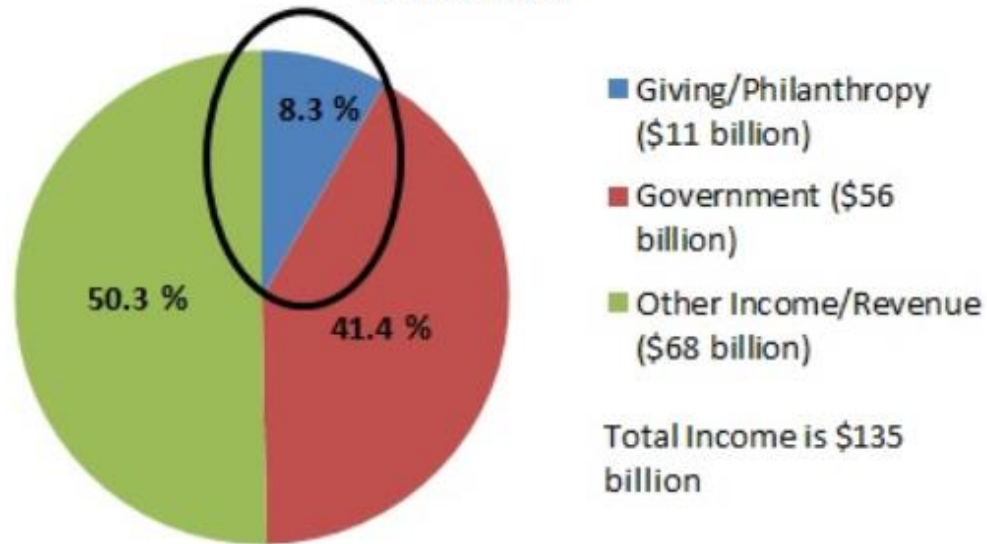


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The Board Chair – a non-profit's greatest
fundraising asset

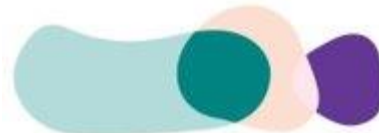
philanthropy in Australia

How Do Australian Charities Fund their Activities?



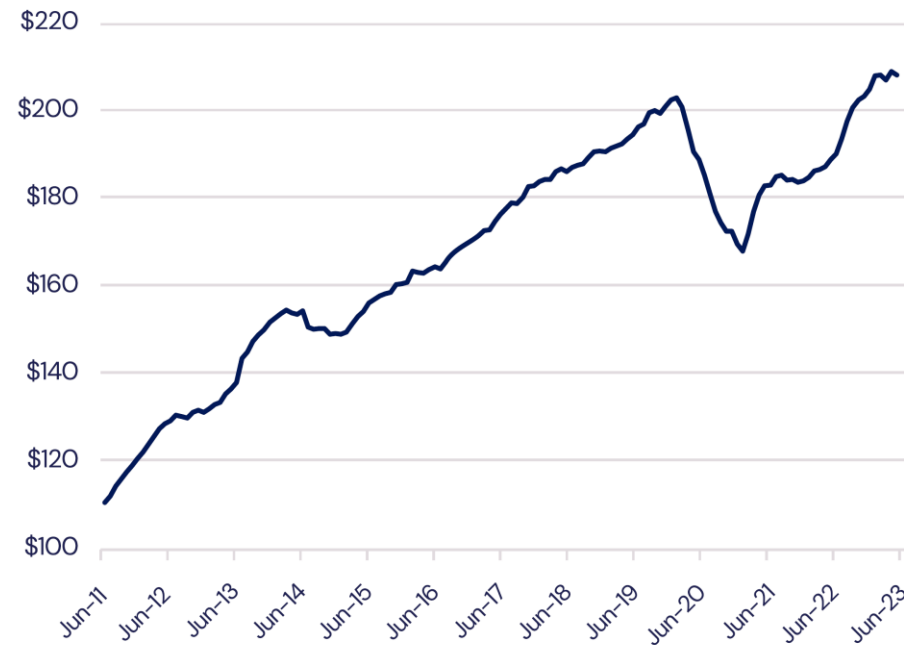
Total charity sector income = approx. \$140bn/year

Philanthropy & giving comprises 8% of the charity sector's income



current giving trends (Aus)

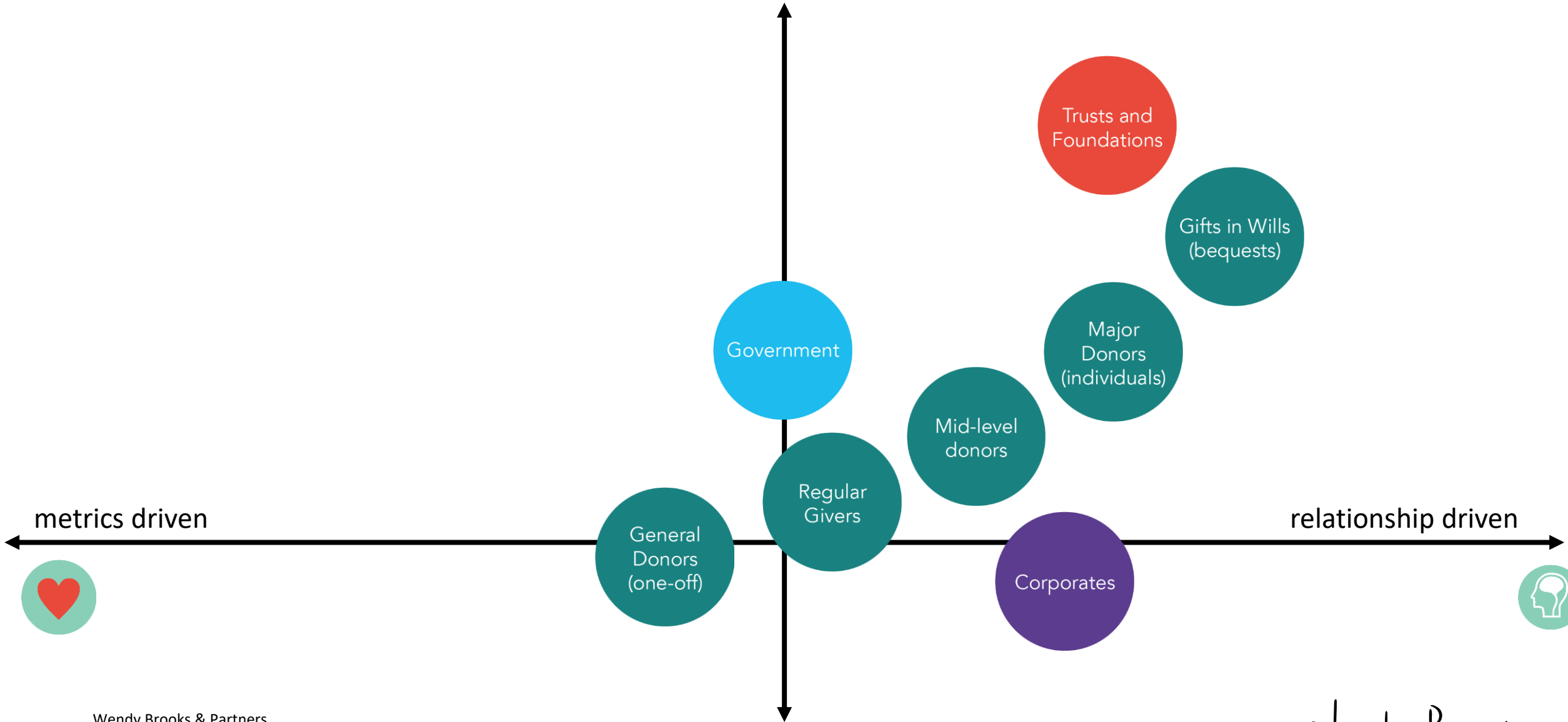
Donations June 2011 - June 2023



recent giving trends - Australia

- JB Were have predicted that in the next 20 years, structured giving, bequests and corporate support will increase much faster than the mass market giving and volunteering.
- High net worth giving and corporate community investment both grew strongly in 2020 but 2021 & 2022 was a different story.
- Mass market giving continuing to decline (The Support Report says mass market giving could go from 50% to 33% of total giving by 2036).
- In June 2022, the GiveNow platform recorded 17% fewer donors when compared with that time last year.

higher return on investment



metrics driven

relationship driven



lower return on investment

DGR vs no DGR

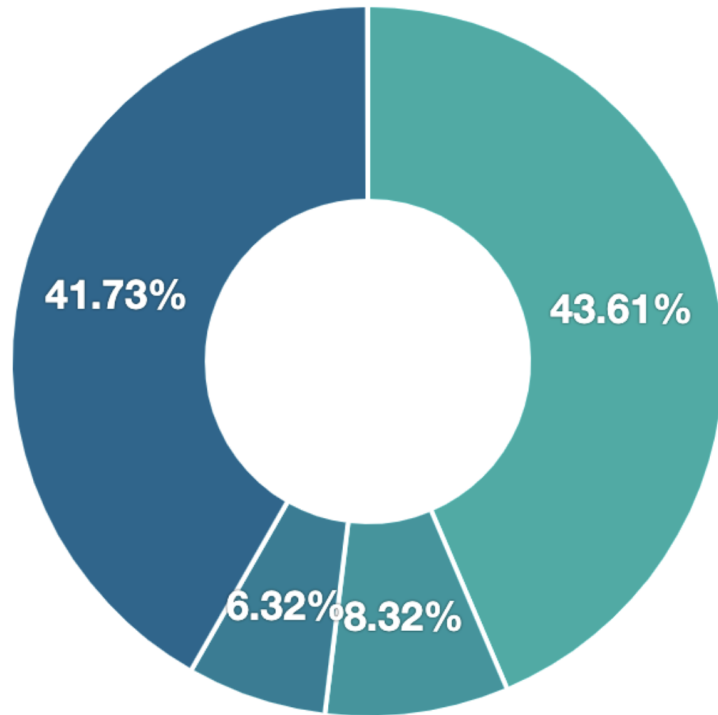
- **You have to have DGR to be able to apply for funding from trusts and foundations**
- **If you do not have DGR status, you can attract funds from individuals (their donation just won't be a tax-deductible donation) and you can accept gifts in wills**



where does your organisation receive funding from? (example of 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



three things funders look for

1. Who is on your Board, particularly 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?



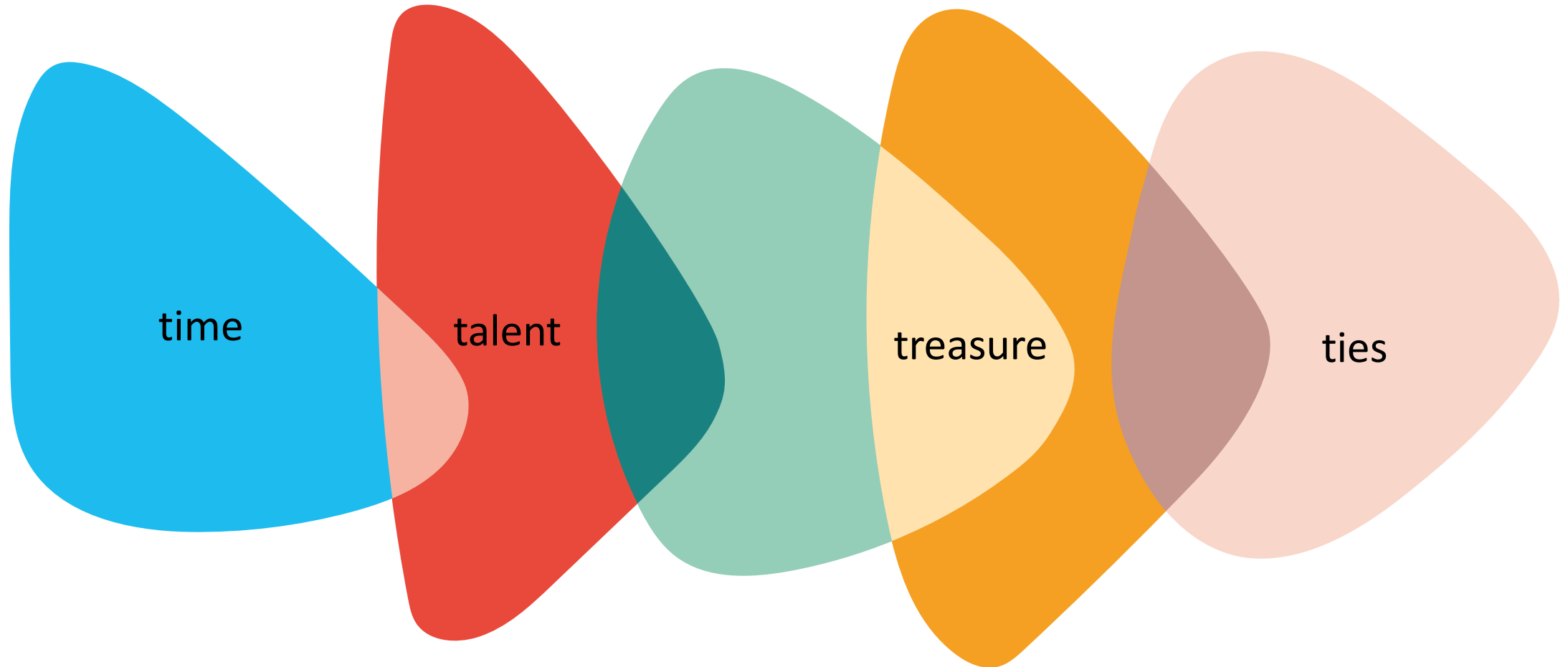


When the Chair and other board members help,
organisations raise more.

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

role of board members in fundraising



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Using a powerful case for support as a Board tool

organisation case for support

Clearly articulates:

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



case for support: monkey baa

monkey
baa

Thoughtful theatre experiences for every young person



Case for Support
2023

Joy meaning change

Monkey Baa is a theatre company empowering young people to shape their lives through inspiring, imaginative theatre and creative experiences.

We present and tour performances, commission new works and nurture theatre makers all over Australia. Our work connects fresh and lived perspectives to communities at the interface of social and cultural change.



Our impact

Monkey Baa's program of high-quality immersive theatre has been developed to engage young people in ways that bring joy and agency to issues that can otherwise be complex and heavy.

Our theatre experiences contribute to the social, mental and general well-being of young people. We facilitate ways of knowing, being and doing that can overcome the barriers young people might experience. Our work enhances young people's capacities and perspectives when they navigate their lives; whether at home, with friends, in the community or online.

For example, schools are mandated to help children achieve capabilities that go across and beyond traditional subject areas. These include intercultural understanding, ethical understanding, and personal and social capabilities. They are challenged to use multiple modes that enable diverse learners.

However, for a range of reasons (resourcing, geographic isolation or learning strategies) children are often not facilitated to engage in these important issues.

Participation in theatre helps young people develop creativity, self-expression, emotional intelligence and collaboration skills. We give them a place to spark their imaginations; a place to explore and understand the world and their place in it.



Standout features of our work:

- High quality theatre experiences for a young audience.
- Our approach to centering young people in everything we do.
- Our reach and engagement only in cities but in regional and remote Australia.
- Our ability to facilitate young people to engage with complex issues in a safe environment.
- Our work with diverse young people, artists and creatives to tell the stories not always seen on our stages.
- Our relationship-driven connection with our communities all over Australia.
- Our theatre access programs that provide free theatre experiences to those in need.



Our program of work

Monkey Baa :

- Tours theatre productions to regional and urban centres across Australia.
- Commissions and create new works.
- Facilitates artists programs such as Creative Associates and supports independent artists.
- Produces learning programs including school holiday workshops, school incursions and national Teaching Artists tours.
- Presents seasons of theatre for young people at our theatre, ARA Darling Quarter Theatre.

Monkey Baa has engaged 1.6 million young people in Australia and internationally over 26 years. We present seasons in major cities and tour extensively including over 185 rural towns and remote communities. We employ over 80 creatives and crew every year.

In 2023-2024 we will present over 20 productions and commission four new works. We will tour our productions of Possum Magic, The Peasant Prince, and Josephine Wants to Dance, around Australia, including to remote Queensland, NT and WA communities that are recovering from flood devastation in 2022 and 2023.



How you can help

Monkey Baa has been funded by generous long-term supporters, patrons and philanthropy, which in turn has given us the capacity to attract federal and state Government grants for our work.

Our immersive theatre program, that has been lauded and valued over many years, was profoundly impacted during COVID but is now experiencing a renewed surge in demand across Australia.

We are seeking philanthropic partnerships to recover, to develop and deepen our capacity, and to create and present performances and tours. Major projects for which we are seeking funding for development and production are:

Detention

A new theatre adaptation of the novel by Tristan Bancks, by Wiradjuri theatre maker and emerging writer, Callan Purcell, explores the lives of Hazara refugees from Afghanistan.

The Duck and the Darklings

An immersive experience for children that teaches them about finding hope in a world in climate crisis that can be bleak and challenging.

Possum Magic regional and remote tour

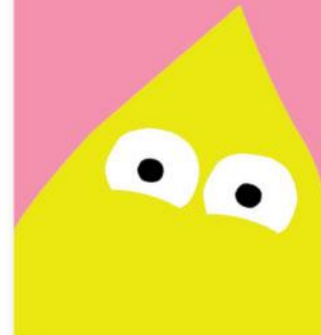
This iconic Australian children's story that has captured the hearts and imaginations of children for 40 years, will tour 50 communities around Australia. We are seeking funding for regional Queensland, the Northern Territory and Western Australia,

Schools & Community Access Program

We are seeking a founding partner to match our own commitment to provide free tickets and transport for up to 10 schools and community groups from the lowest socio-economic areas of Sydney.

Commissioning Fund

We are seeking partners to co-invest in a fund that supports new artists and the creation of innovative works that will engage and inspire young audiences.





I would be delighted to talk with you about collaborating to create joy, meaning, and change with and for young people through theatre.

Please call me on 0492 141 354 or via email at kevin@monkeybaa.com.au.

Kevin du Preez
Executive Director
Monkey Baa Theatre Company

Questions for discussion

What's your role as Chair in leading the development of a case for support?

How do you ensure your case for support is used effectively for different funding opportunities?



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case study: carriageworks

the carriageworks case

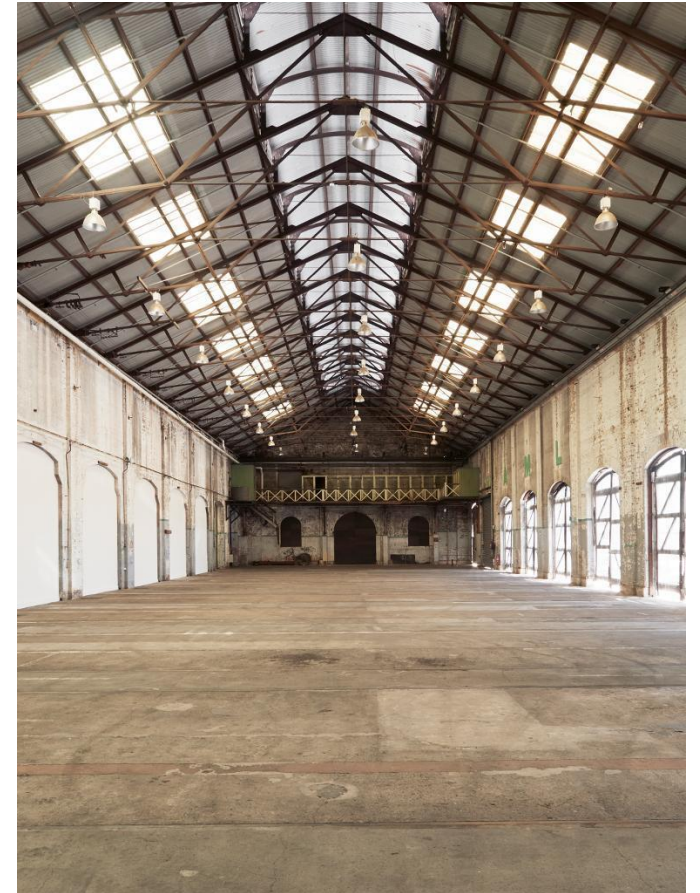
In March 2020, the iconic Sydney cultural hub Carriageworks cancelled dozens of programs & events due to COVID-19 forced closures



the carriageworks case

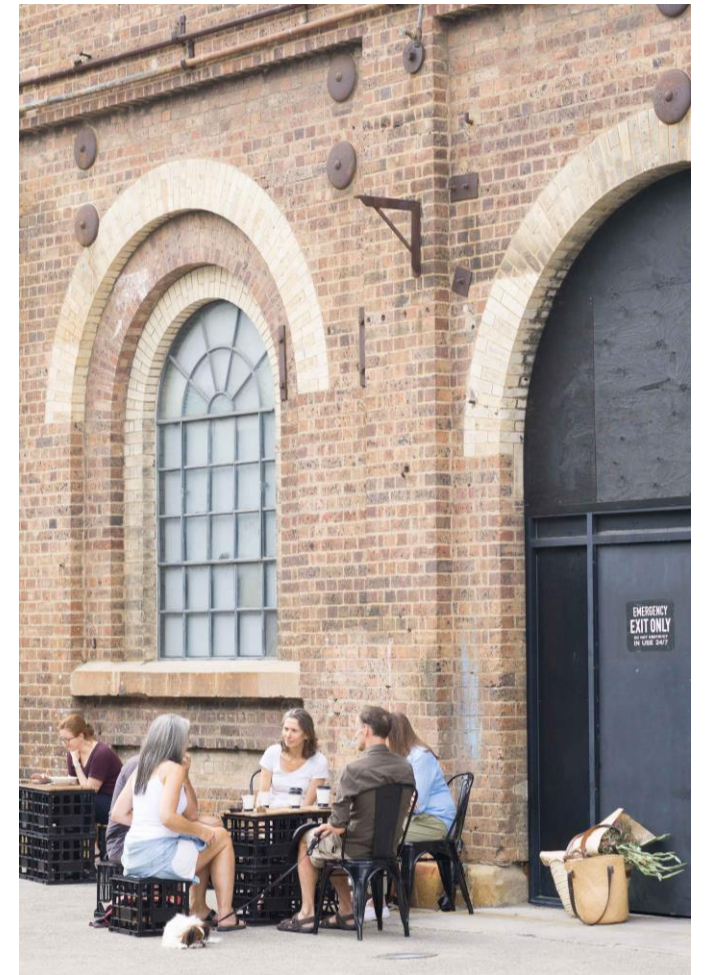
April 2020 – Almost $\frac{1}{2}$ of Carriageworks staff stood down for four months

May 2020 – Carriageworks goes into voluntary administration

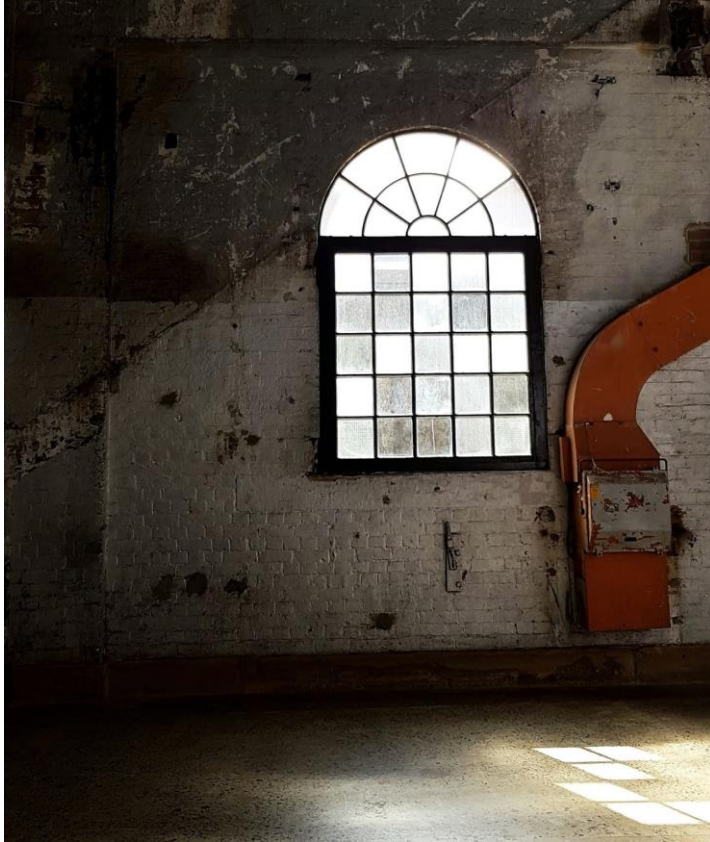


the champion efforts of the Chair and several key board members

- Commit monetary contributions
- Gain support of major partners
- Revise Carriageworks' business model & operational organisation
- Negotiate Deed of Company Arrangement with creditors
- Negotiate with Create NSW for 10-year lease & 5-years of funding



the carriageworks case



Key board members coordinated a collective of impassioned philanthropists commit \$2 million to ensure Carriageworks' survival.

The most generous donors were board directors.

michael gonski: a “master fundraiser”

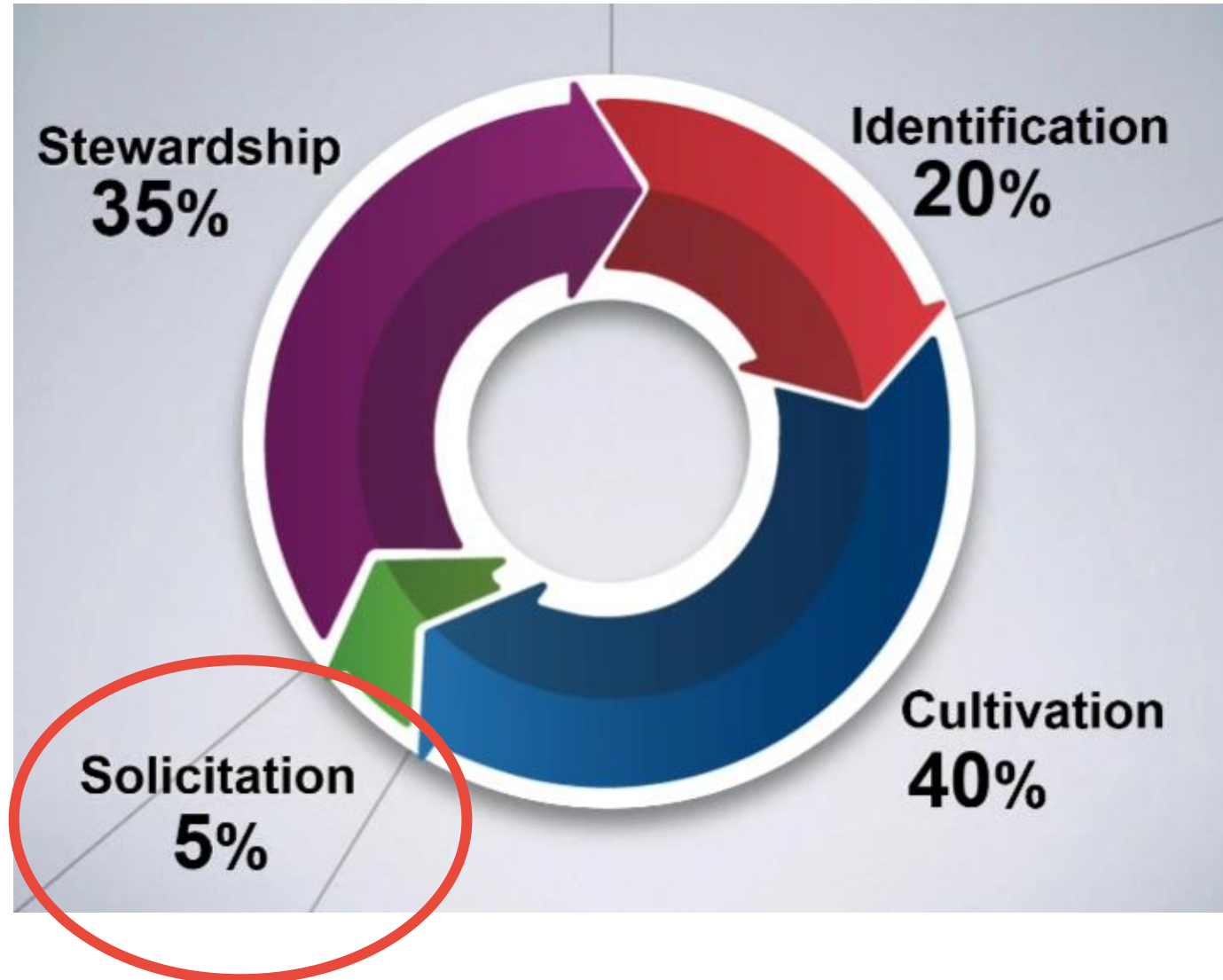
“The skills as a lawyer in my day job helped me at least to start to ask the right questions [as a board chair], but, equally, the things I learned as a Chair changed my whole life as a lawyer,” – Michael Gonski



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using your skills as Chair
to support the CEO & organisation

the fundraising process



steward

Fact: It typically costs 6-7 x more to find one new donor than it does to retain a donor.

Thanking: Make donors feel appreciated by thanking them in person, sending personal emails, letters or cards.

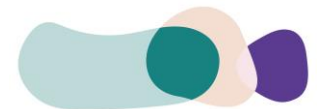
Example: A Chair of a Board sent a personal card of thanks to a donor and the donor was so impressed and grateful she tripled her donation.



everyone has a part to play

Board engagement is:

- felt by staff;
- heard by donors;
- acknowledged by funding agencies; and
- experienced by all



Questions for discussion

As Chair, where do you think you can be most effective in supporting fundraising in your organisation?

How well do you think your organisation approaches strategic fundraising?

What is one area for improvement?



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questions?

thank you.

Catherine Brooks

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Feedback



<https://www.surveymonkey.com/r/2024advancedforchairs>