

RETHINKING MAJOR DONORS

The way you think about Philanthropy is wrong

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Head of Philanthropy
Oxfam Australia

Progress Conference
June 2019



OXFAM
Australia



ROY AND NOLA THOMPSON

OR...

**HOW UNIVERSITIES GET ALL
THE MONEY...
... AND DONT ACTUALLY
NEED IT!**

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INTRODUCTION

TOP DONORS OF 2018

1	Paul Ramsay Foundation	\$85.8m	Health, Education
2	Minderoo Foundation	\$60.4m	Community, cancer, oceans, Indigenous disparity, higher ed research, early childhood, slavery.
3	Ian Potter Foundation	\$25.8m	Arts, community wellbeing, education, environment, health
4	Lowy Foundation	\$22m	Arts, medical research and the Lowy Institute for international policy.
5	Graham and Louise Tuckwell	\$20m	Australian National University
6	Ainsworth family	\$19m	Arts, health and medical research at Western Sydney University.
7	Kinghorn Foundation	\$17.9m	Medical research, poverty and Australian youth.
8	Susan and Isaac Wakil Foundation	\$17.2m	Arts, nursing and health at University of Sydney.
9	Gandel Philanthropy	\$16.7m	Arts, education, health and medical research, youth at risk, Jewish identity, Indigenous, poverty
10	Pratt Philanthropies	\$14.1m	Food security, health, arts, education, Jewish life, Aboriginal advancement, environment
11	Andrew and Paula Liveris	\$13.5m	Liveris Academy at University of Queensland
12	Myer Foundation and Sidney Myer Fund	\$12.9m	Arts, education, poverty and disadvantage, sustainability and environment.
13	Stan Perron Charitable Trust	\$12.8m	Disadvantage and improving children's health.
14	Packer family and Foundations	\$12.1m	Arts, medical research and community.
15	Hansen Little Foundation	\$11.5m	University of Melbourne, State Library of Victoria.



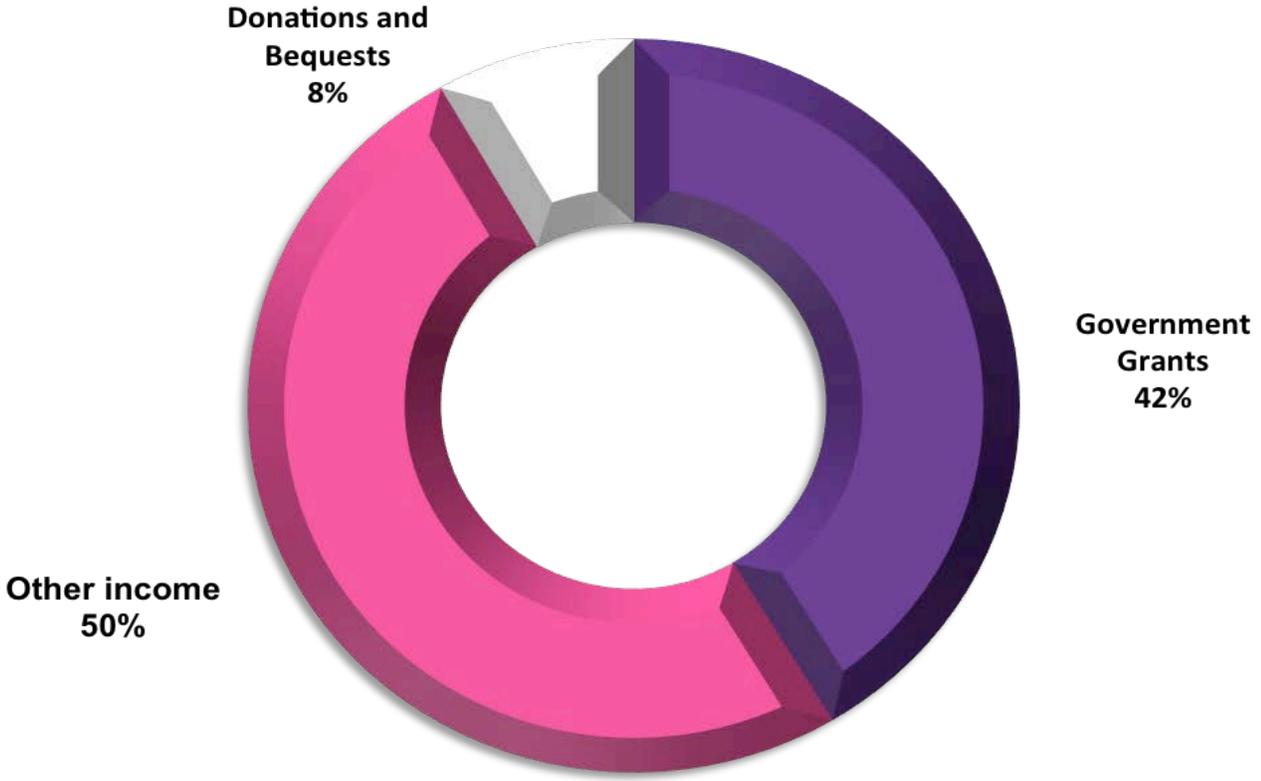
“Universities, the arts and medical research are the beneficiaries of the biggest gifts. It's not uncommon for a top-tier university to raise more than \$50 million each year. Thanks to its alumni networks the tertiary sector is considered one of the most sophisticated fund raising machines in the market.”

(Source: John McLeod, co-founder of the JBWere's Philanthropic Services division, which manages over \$5 billion in charitable assets, and compiler of the Philanthropy 50 list, AFR, April 2018)



TOTAL CHARITABLE INCOME IN 2015:

\$134.5 BILLION



Source: The Conversation, Mar 2017

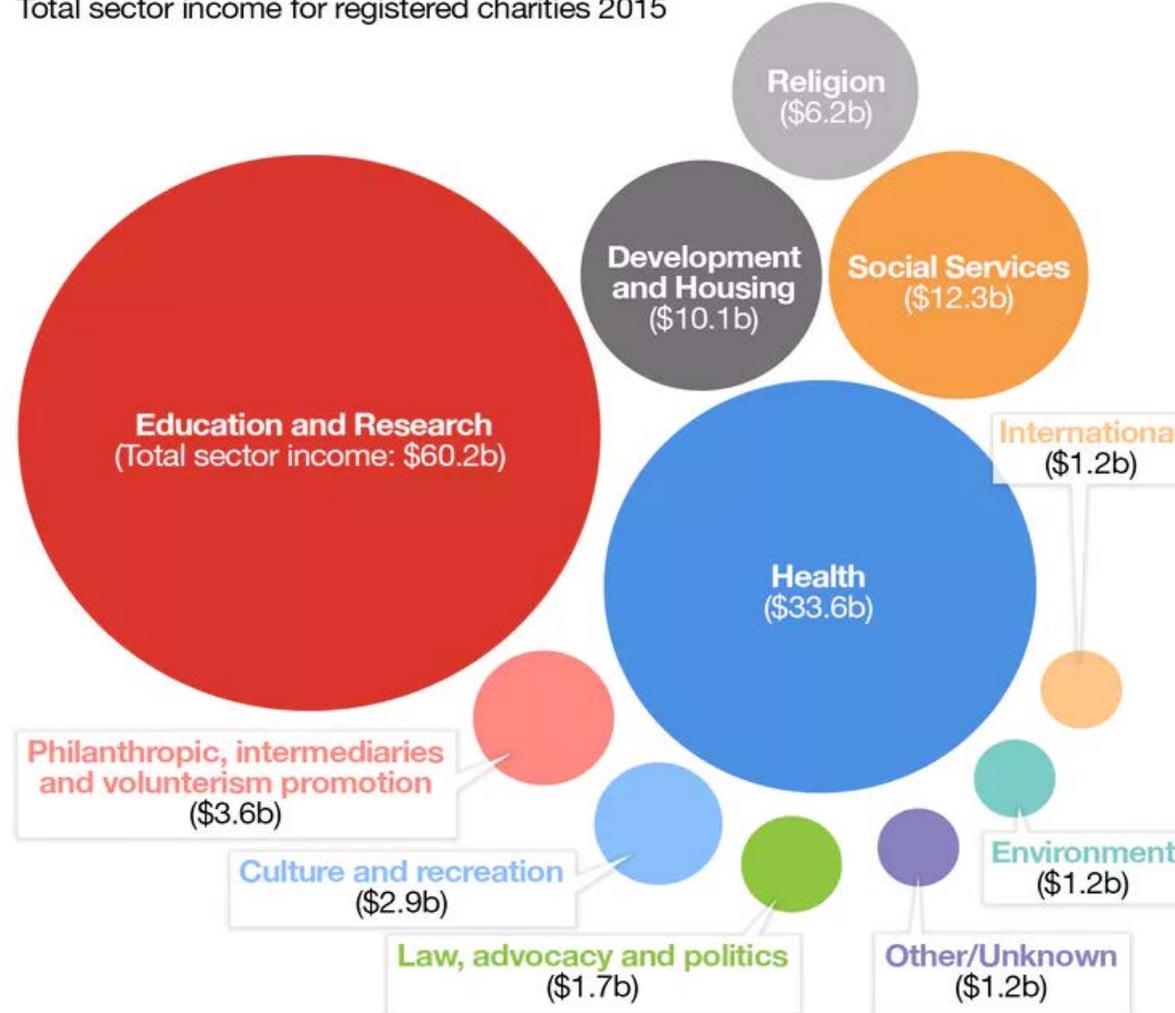
GIVING AUSTRALIA - 2016

	2005	2005 revised	2016
Total Donations from Individuals	\$7.7b	\$10.1b	\$12.5b
* Donor numbers	13.4m	13.4m	14.9m
* Percentage	87%	87%	81%
Average Donation	\$424	\$553.92	\$764.08
Median Donation	\$100	\$130.64	\$200

(Source: Giving Australia, QUT, 2016)

INCOME BY SECTOR - 2015

Income by sector
Total sector income for registered charities 2015



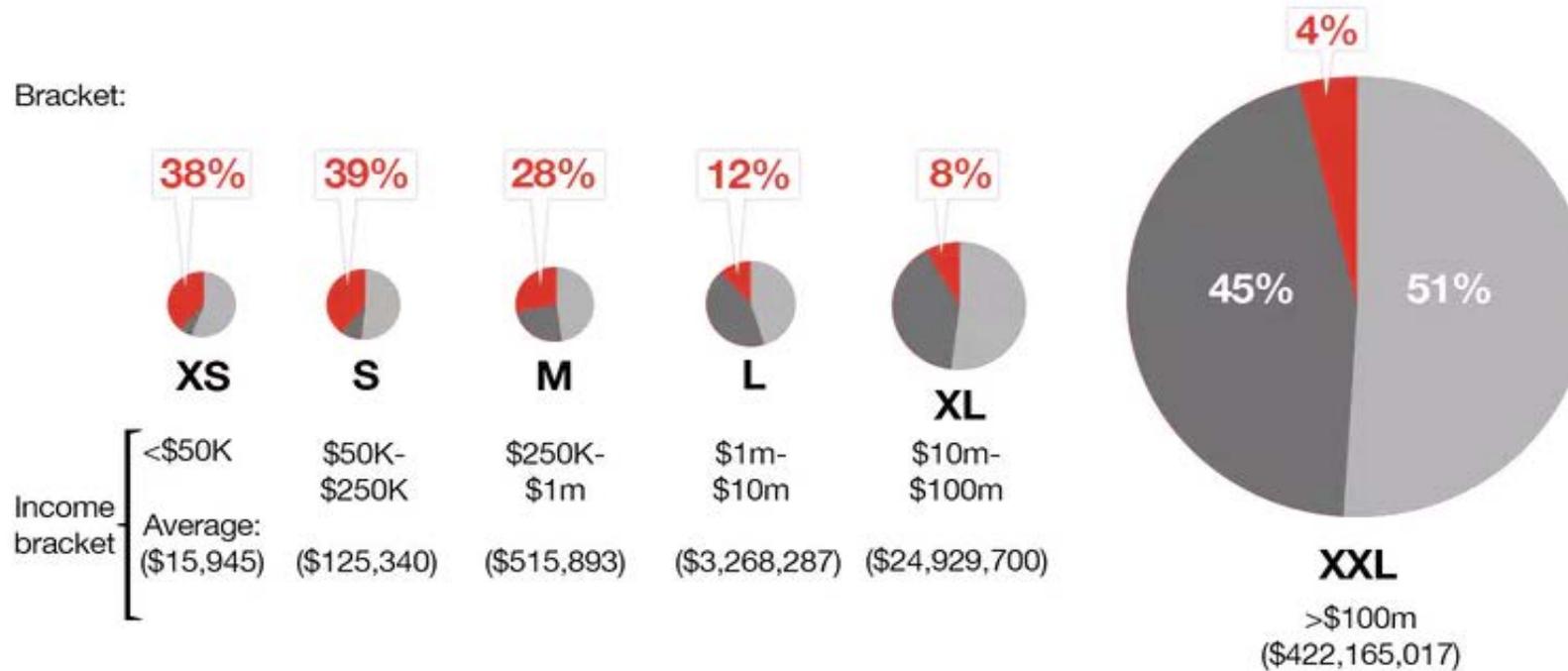
SOURCES OF INCOME - 2015

Sources of income

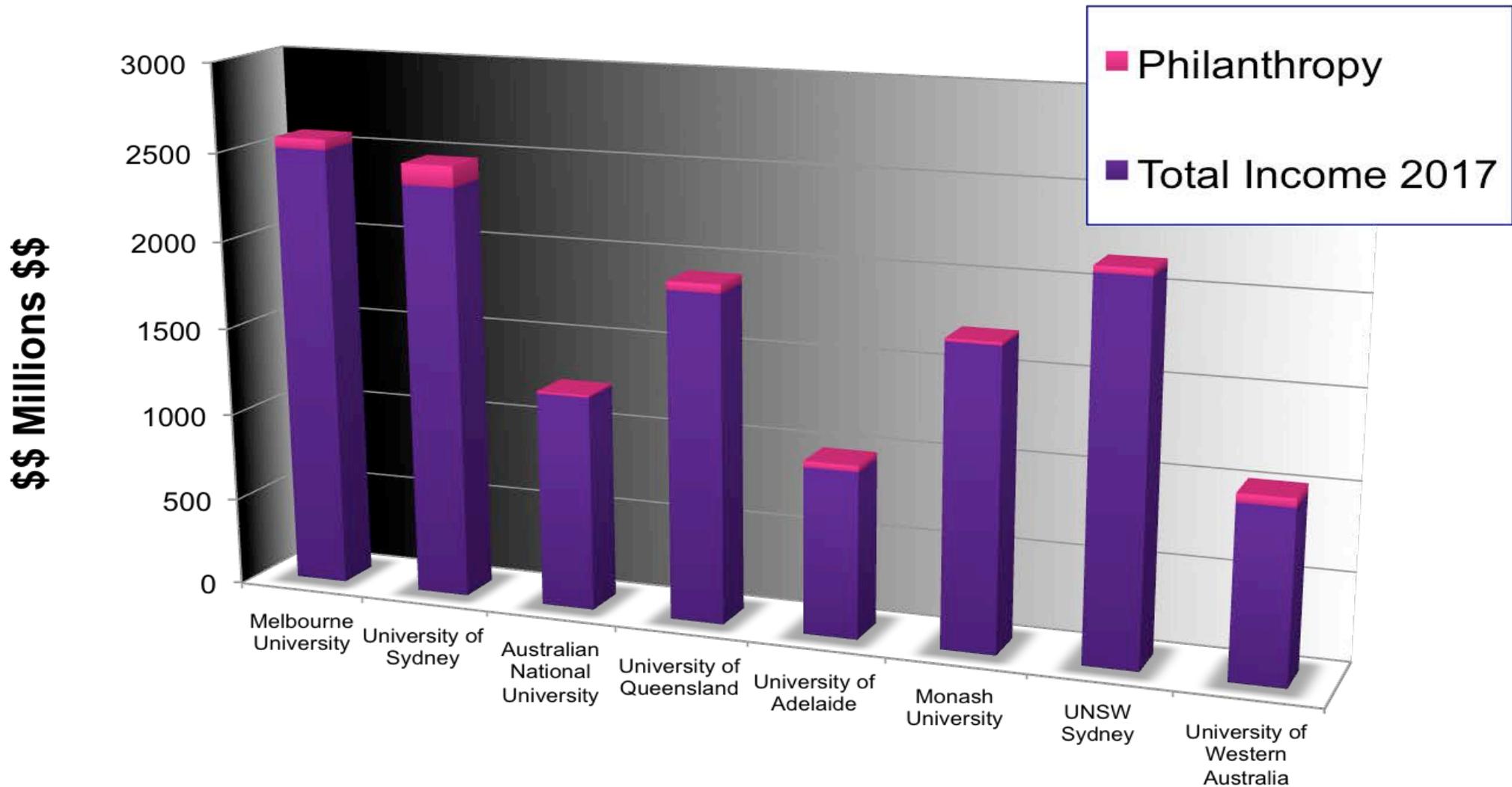
Circles scaled on average total income.

■ Donations and Bequests
 ■ Government grants
 ■ Other income

Bracket:



Source: The Conversation, Mar 2017



'GROUP OF 8' TOTAL REVENUE - 2017

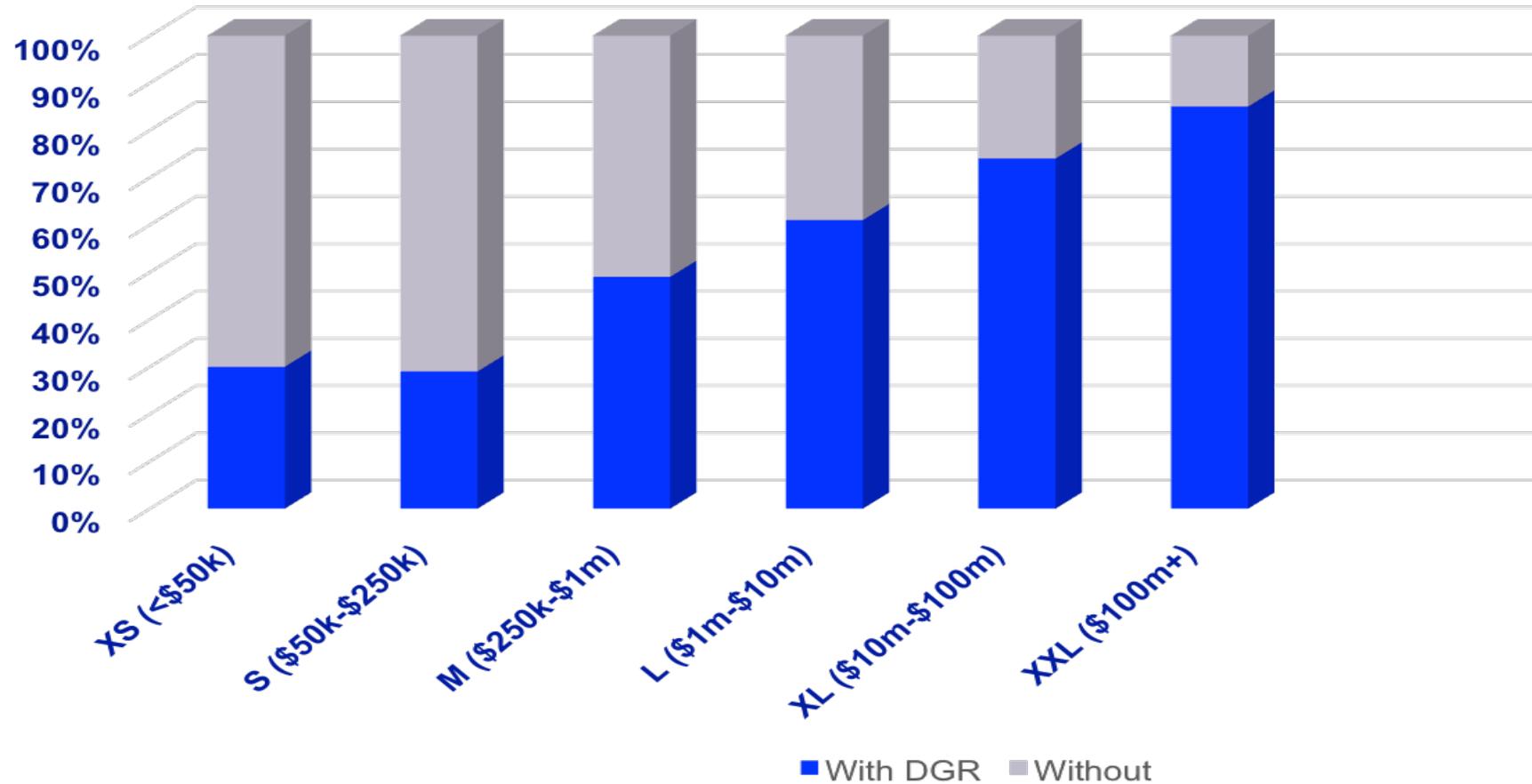




A woman in a pink shawl and beige top is smiling broadly with her hands raised in a crowd. She is wearing several blue bangles on her left wrist. The background shows other people, some with their hands raised, suggesting a celebratory or religious gathering.

WHY?

% OF CHARITIES WITH DGR STATUS



Source: The Conversation, Mar 2017

UNIVERSITY GIVING

1. Credibility

2. Ambition

3. Contacts

4. X-Factor

5. Ask For It



MAKE A DIFFERENCE?



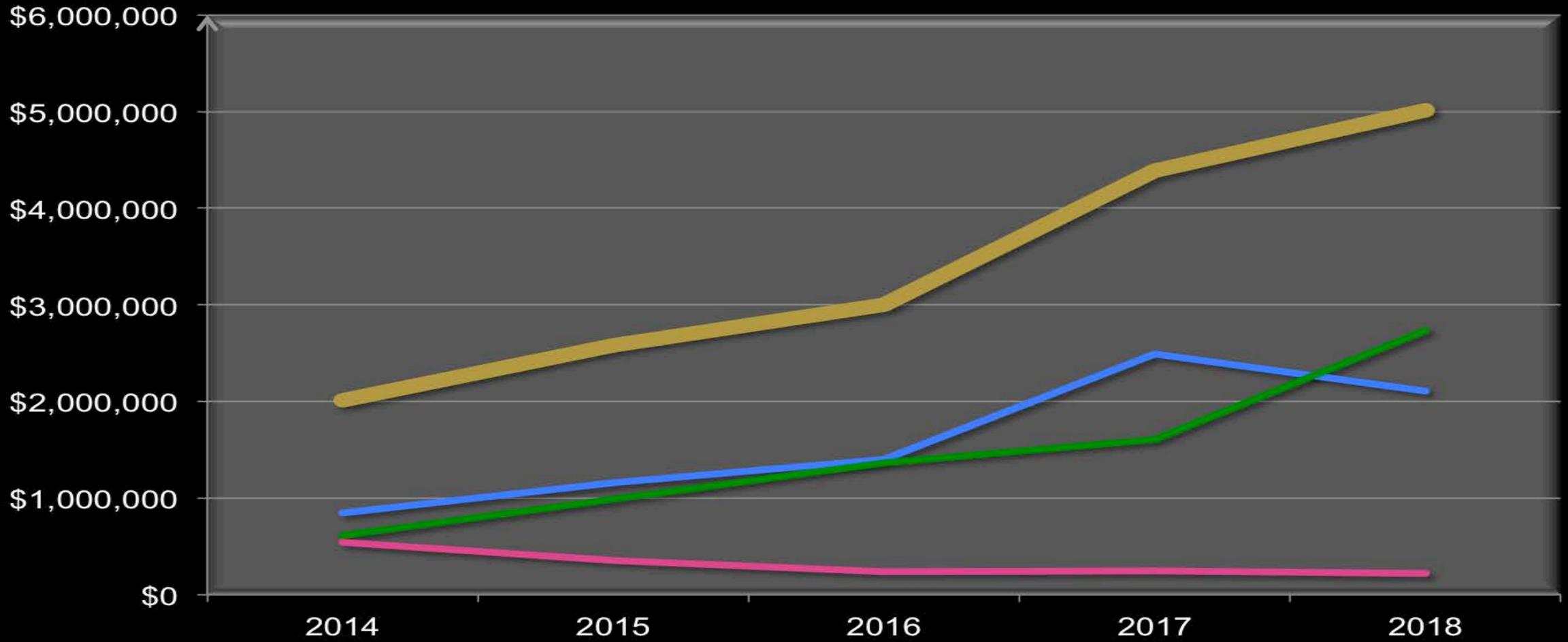
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Australia

OXFAM MAJOR GIVING 2014 - 2018



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Australia

TOTAL MAJOR DONOR GIVING – 2014 TO 2018



A woman in a pink headscarf and beige dress is smiling broadly with her hands raised in a gesture of joy or celebration. She is surrounded by a crowd of people, some of whom are also smiling and clapping. The background is slightly blurred, focusing attention on the woman in the foreground.

SO WHAT HAPPENED?



OXFAM
Australia

2 x Full time staff
1 x 0.6 FTE
1 x 0.5 FTE Trusts and Foundations

2014

Total raised:	\$2,012,369
Appeals:	\$541,311
Tied:	\$845,325
Untied:	\$612,133

Total expenditure: \$38,000

2 x Full time staff
1 x 0.6 FTE
1 x 0.5 FTE Trusts and Foundations

New product:

**Thematic Proposals &
Impact Report**

Total expenditure: \$38,000

2015

Total raised:	\$2,583,880
Appeals:	\$356,832
Tied:	\$1,155,849
Untied:	\$988,510

New product:

The Oxfam Circle

CHECK OUT
www.w4kbl.org

CQ CQ
CALLING ALL
STATIONS

145.230
179.9 PL



CONTACT
n4mht@mchsi.com

VE TESTING AT 9:00
WALK-INS WELCOME



WELCOME
TO THE

HAM RADIO
SWAPMEET

PENNINGTON FOLK MUSIC FESTIVAL

••••• **FIRST ANNUAL** •••••

"PENNINGTON"

HAMFEST



INDOOR TABLES ARE AVAILABLE - FCFS

NO FEES TO ENTER OR SETUP

DOOR
PRIZES

FOOD AND DRINKS
WILL BE AVAILABLE

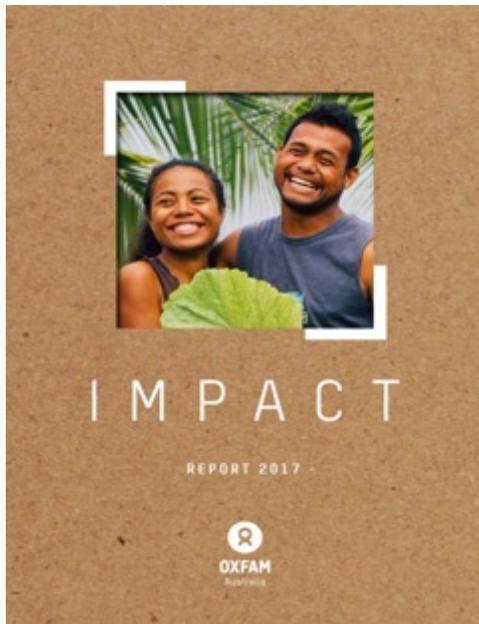
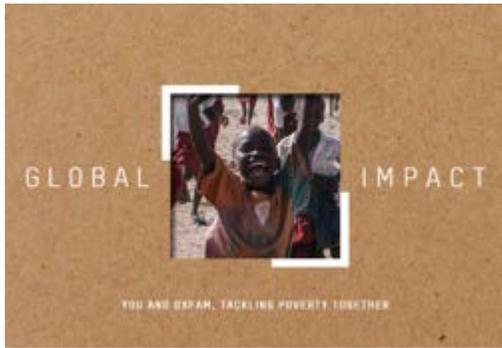
DOOR
PRIZES

PRINCETON, KY
FIRE TRAINING CENTER

EXIT 12 OFF WK PKWY
2001 HWY 62 WEST

JUNE 2nd, '12 7:00 AM till NOON

PRINCETON HAM RADIO CLUB AND CALDWELL CO ARES





Suzanna Goodridge is a farmer from Papua New Guinea. She is part of Oxfam's food security programs in rural PNG. Photo: Fabio Tancos/Oxfam

YOUR FINANCIAL SUPPORT

INFLUENCERS
\$4,000 – \$9,999 pa



INNOVATORS
\$10,000 – \$24,999 pa



LEADERS
\$25,000 – \$49,999 pa



VISIONARIES
\$50,000+ pa or
\$10,000+ pa plus a
bequest commitment



The Oxfam Circle, Oxfam's key supporter program: recognising your generous support and bringing you closer to our important work.

By making an annual commitment to support Oxfam's critical work in the fight against poverty and injustice, you are making a declaration that goes beyond a financial transaction. By considering including a gift to Oxfam in your Will, you're making a visionary statement.

You are also inspiring and influencing others to give, creating meaningful change in impoverished communities, establishing new leaders who are empowered to make a real difference, and forging a pathway for a better, more equal world.

Membership is optional and can be opted out of at any time.



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Australia

2 x Full time staff
1 x 0.6 FTE
1 x 0.5 FTE Trusts and Foundations

2016

New product:

Site visits

Total expenditure: \$38,000

Total raised:	\$3,004,788
Appeals:	\$237,600
Tied:	\$1,399,255
Untied:	\$1,367,933

New product:

Face to face asking

2 x Full time staff
1 x 0.6 FTE
1 x 0.5 FTE Trusts and Foundations

New product:

Capital Campaign

2017

Total raised:	\$4,385,271
Appeals:	\$244,374
Tied:	\$2,488,458
Untied:	\$1,609,879

Total expenditure: \$38,000

2 x Full time staff
1 x 0.6 FTE
1 x 0.5 FTE **Capital Campaign Support**

2018

New product:

Major Donor RG and
multi-year pledges

Total expenditure: \$38,000

Total raised:	\$5,012,182
Appeals:	\$216,578
Tied:	\$2,110,476
Untied:	\$2,732,709

New product:

Prospecting

2 x Full time staff
1 x 0.6 FTE
1 x 0.5 FTE **Capital Campaign Support**

2019

New product:

**Capital Campaign
Committee**

Total raised: \$5,500,000
Appeals: \$200,000
Tied: \$2,600,000
Untied: \$1,700,000

New product:

Stewardship plan

Total expenditure: \$38,000

DONATIONS

\$50,000+

\$100,000+

2014:

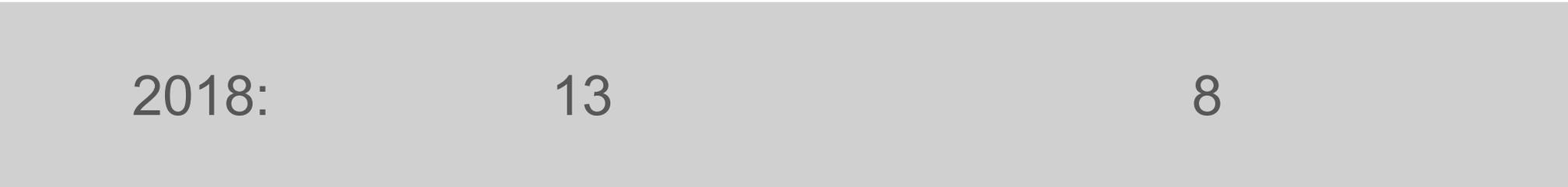
5

3

2018:

13

8



ANDREW AND BETH PHILLIPS



DO THIS ONE THING...



MAJOR GIFTS...



**DO THIS OTHER
THING...**



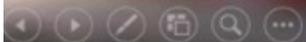
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NEW 'PRODUCTS' AND PROCESSES



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Australia



Products	Processes
Thematic proposals & Impact Reports	Appropriate budgeting
Site visits	Board Peer Screening
Targeted functions	The Oxfam Circle – donor club
Capital Campaign	Multi-year pledges
Major Donor RG	Prospecting
Stewardship Plan	CEO engagement



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THANK YOU

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