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## ANNUAL REPORT 2008

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FIA is the national peak body for professional fundraising in Australia. It is a Company Limited by Guarantee (ABN 51 943 541 450) and recognised as a Charitable Institution. The Library Trust Fund, a Deductible Gift Recipient, is run wholly through FIA.

### Our Vision

*Advancing professional fundraising*

### Our Purpose

We exist to make the world a better place by advancing professional fundraising through

*Advocacy of standards*

*Professional development pathways*

*Measurable credentials*

so that our members achieve best practice.

### Our Values

FIA will uphold the value and reputation of professional fundraising through its staff and members to the public, government and business.

### Our Service charter

We will be responsive and efficient in all aspects of our work.

We will address expeditiously and respectfully the needs of members, volunteers, partners and clients, government, business and the public.

We will provide professionally managed services, evaluate their delivery and act to improve our performance.

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## FROM THE CHAIRMAN

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This is my first report as Chairman of FIA, a role which I feel privileged to have held in 2008. Your directors have worked diligently through the board and its committees to ensure that FIA meets the highest standards of governance and provides the best of services to meet the needs of its members. New directors who have contributed to the work this year include Sharon Hillman FFIA (President Chapter 1), Joy Barrett CFRE MFIA (President Chapter 2), Nigel Harris CFRE FFIA (President Chapter 3), Brian Holmes MFIA (President Chapter 5 and Hon Treasurer), Derek Minett MFIA (Additional Director, Chapter 2), John O'Donnell MFIA (Organisational Member) and Pamela Murray-

Jones MFIA (Independent Director). Each has now served the first year of their two-year appointments and their contributions have been outstanding. Continuing directors have included Mark Goldsmith MFIA (President Chapter 4 and Vice-Chairman), Bruno Yvanovich MFIA (President Chapter 6), Harry Wilsdon MFIA (President Chapter 7) and Leo Orland FFIA (Additional Director, Chapter 1 and Executive Director). During the year, Harry Wilsdon resigned for personal reasons and Anita Gowers MFIA was elected President Chapter 7 and subsequently a director of the Company. Towards the end of 2008, Anita Gowers transferred to Victoria and consequently the position of President Chapter 7 remains vacant pending elections in early 2009.

The Board's needs have been admirably served by Sue-Anne Wallace, Company Secretary, and Prabhleen Ahuja, Manager Policy and Standards. Prabhleen especially has pushed the development of appropriate policies, including the strategic plan, business plan and reporting framework of key performance indicators, which together guide the work of the Board, its committees and management, and has continued to develop the Board's and Chapter Executive Committee induction manuals.

The most significant national achievement this year has been the completion of what has become known as 'the codes project', FIA's Principles and Standards of Fundraising Practice. This is reported elsewhere and I want to acknowledge the dedication and commitment of the Codes Task Force which has driven forward this process since May 2005. Chaired by Jeremy Maxwell CFRE FFIA, the task force included Laurence Joseph CFRE FFIA, Leo Orland FFIA and Michelle Trevorow CFRE MFIA. Their work has been recognised with a presentation made at a Chapter 1 professional development event and it is equally important that we recognise their commitment nationally, as well as the management of the project by FIA's team, including Sue-Anne Wallace, Stephanie Wong, Prabhleen Ahuja, Louise Steer and Marianne Ramsay.

Building on this achievement, FIA has received intense national recognition by state and federal governments, in particular through the Senate Economics Committee which reported to the Government in late 2008. FIA's Principles and Standards of Fundraising Practice attracted the Committee's attention and have been promoted, along with the codes of the Australian Council for International Development, as providing a template for new codes which might be adopted by a new national regulator.

A second national achievement has been the roll-out of a new national curriculum for FIA's signature training program, Skills. Skills 1 and 2 have been delivered in most chapters in 2008 and Skills 3 will be presented in the larger chapter in 2009. Compliments have flowed from presenters, largely FIA's senior members, and participants. The take-up from students completing both Skills 1 and 2 has grown significantly. We are indebted to the work that Pamela Murray-Jones did to guide this project in its final stages and to Cindy Higgins for her management of the project. A final review of Skills 1 and 2 is in train with contributions from presenters from every chapter providing further feedback to assist the last stage of development.

Your directors committed to investing from reserves in 2008 to ensure that FIA consolidated its rapid growth over the past four years and further developed some of its key resources, including IT resources and management and curriculum development. Towards the latter part of the year, Anne Gribbin was employed as a consultant to work on two fronts, developing FIA's Development Plan and a Strategic Professional Development Plan. Both tranches of work have been signed off by the Board and will form a framework for initiatives to be undertaken in 2009.

So much of our work is supported by our members working in a voluntary capacity to support the reputation and development of professional fundraising and fundraisers in Australia. On behalf of my fellow Directors, I thank each volunteer who has worked with us over the past year and I look forward to continuing this work in 2009.

Since mid-2004, FIA's development has been steered by our CEO, Sue-Anne Wallace, who has provided the organisation with leadership and expertise to position FIA as a key reference source and significant influence in the shaping of fundraising regulations and standards. Under Sue-Anne's guidance, FIA has increased its capacity as an

organisation to support not only its sector based work but also to facilitate professional development, member services and public representation. As evidence of Sue-Anne's contribution and FIA's increasing relevance, membership has increased by 43% since 2004 and FIA now reaches 5,513 number of people through its various professional development programs. FIA's history reflects the continued growth of a relevant professional organisation that has paralleled the evolution of fundraising as a profession. Sue-Anne's contribution has enabled FIA to take yet another significant step forward on this pathway and she should be justly proud of the enduring mark she has made on fundraising in Australia and indeed at an international level. To you Sue-Anne, I convey heartfelt thanks not only of the members of FIA but also of those across the broader sector with whom you have worked to advance professional fundraising in Australia. You have our best wishes and sincere thanks.



Lesley Ray CFRE MFIA  
Chairman

#### **Board Members 24 February 2008 – 28 February 2009**

**Lesley Ray** Grad Cert (Phil & NpSt) CFRE MFIA (Chairman) Director of Fundraising, Mater Foundation, appointed 25/02/2006

**Mark Goldsmith** MFIA (Vice Chairman) Fundraising Manager Royal Adelaide Hospital Research Fund, appointed 23/02/2007

**Brian Holmes** MFIA (Hon. Treasurer) Director Xponential Fundraising, appointed 24/02/2008

**Joy Barrett** CFRE MFIA Chief Executive Officer Technical Aid to the Disabled NSW, appointed 24/02/2008

**Anita Gowers** MFIA Manager Marketing and Development MS Society of Tasmania, appointed 28/5/08 retired 19/12/08

**Nigel Harris** MBA (Prof), Adv Cert (PR), Adv Cert (Mktg) CFRE FFIA Executive Director, Mater Foundation, appointed 24/02/2008

**Sharon Hillman** B Bus (Tourism) FFIA Director of Fundraising Austin Health, appointed 24/02/2008

**Derek Minett** MFIA Chief Executive Officer North Shore Heart Research Foundation, appointed 24/02/2008

**Pamela Murray-Jones** BA, DipEd, LittB, Grad Cert Bus Admin, MFIA, GAICD General Manager Marketing ITC Group, appointed 24/02/2008

**John O'Donnell** MFIA Managing Director, Blackbaud Pacific Pty Ltd, appointed 24/02/2008

**Leo Orland** BTheol, Dip. Arts (Media Studies), Cert. Advertising, Cert. Copywriting, FFIA Account Director, Robejohn & Associates, appointed 25/02/2006

**Harry Wilsdon** BSc DipEd TTC MFIA MAICD Chief Executive Officer, Multiple Sclerosis Society of Tasmania, appointed 23/02/2007 retired 22/05/08

**Bruno Yvanovich** BSc MPA MFIA Policy and Strategy Research, Fundraising and Development, Australian Catholic University, appointed 27/09/2006

**Peter Burnett** Dip Bus Mgt MFIA Director of Development Ballarat Grammar Foundation, appointed alternate director for Leo Orland 05/03/2008 retired 15/3/08

### **Constitutional and Directors Committees 2008**

The Board of Directors is the governing body of FIA. Its role is to advise the Chief Executive Officer and to accept legal liability for the activities of FIA. It is appointed as trustee of members' and sponsor funds and must also represent the needs of members in encouraging professional development and participating in advising government on policy development. The key responsibilities of the directors are to review the strategic direction, to manage risk and to monitor performance. To undertake these responsibilities the directors call from time to time on committees to provide advice. In 2008 both the Board and the CEO established committees to assist with policy making, planning and evaluation.

### **Trustees of the Library Trust Fund (LTF)**

The LTF is governed by a deed made on 15 January 1993. Directors of FIA also hold the position of trustees of the LTF and meet at least once in each calendar year. In 2008 trustees met on 14 March, 8 August and 5 November.

### **Constitutional Committees 2008**

#### *Chapter Executive Committees (Presidents)*

Chapter 1 Sharon Hillman FFIA  
Chapter 2 Joy Barrett CFRE MFIA  
Chapter 3 Nigel Harris CFRE FFIA  
Chapter 4 Mark Goldsmith MFIA  
Chapter 5 Brian Holmes MFIA  
Chapter 6 Bruno Yvanovich MFIA  
Chapter 7 Harry Wilsdon MFIA and  
Anita Gowers MFIA

#### *Ethics Committee*

Nigel Harris CFRE FFIA (Chair)  
Laurence A. Joseph CFRE FFIA  
Cynthia Nadai (appointed December 2008)  
Rosemary Sainty (resigned November 2008)  
Naomi Steer MFIA  
Susanne Williamson CFRE MFIA  
Vera Visevic MFIA  
Roewen Wishart MFIA

### **Directors Committees**

#### *Audit & Finance Committee*

Brian Holmes MFIA (Chair)  
Lindsay May CFRE FFIA  
Derek Minett MFIA  
John O'Donnell MFIA  
Joe Shannon, Moore Stephens

#### *Nominations Committee*

Margaret Scott CFRE FFIA (Chair)  
Nigel Harris CFRE FFIA  
Jeremy C Maxwell CFRE FFIA  
Lindsay B May CFRE FFIA  
John Townsend AM CFRE FFIA  
David Zerman FFIA

#### *Fellows Nominations Committee*

Leo Orland FFIA (Chair)  
Graham McKern CFRE FFIA  
Margaret Haydon FFIA  
Evelyn Mason CFRE FFIA  
Clare MacAdam CFRE FFIA  
Lyn Walsom CFRE FFIA

#### *CPD Membership Taskforce*

Nigel Harris CFRE FFIA (Chair)  
Pamela Murray-Jones MFIA  
Bruno Yvanovich MFIA

#### *Professional Development Strategy Committee*

Nigel Harris CFRE FFIA (Chair)  
Chris Benaud CFRE FFIA  
Sharon Hillman FFIA  
Pamela Murray-Jones MFIA

*CFRE Funding Models*

Nigel Harris CFRE FFIA

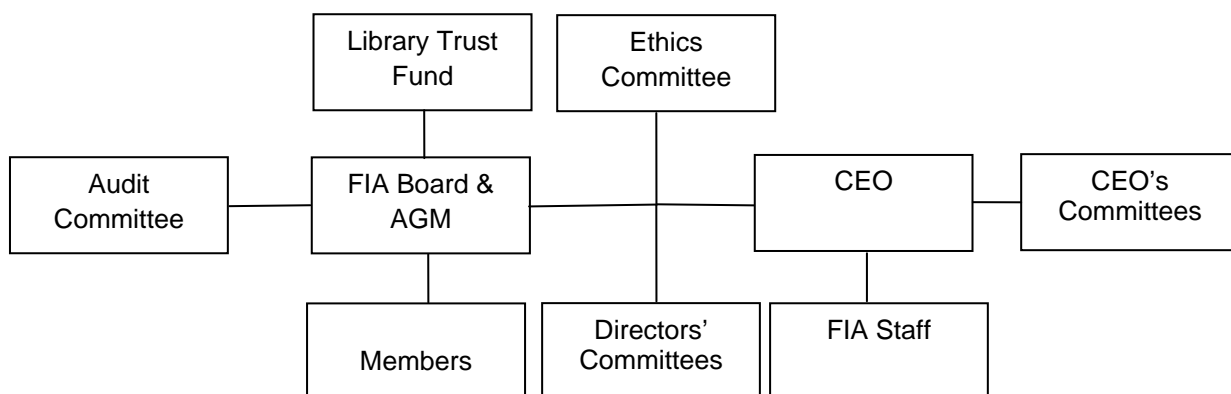
*Strategic Task Force*

Bruno Yvanovich MFIA  
Mark Goldsmith MFIA  
John O'Donnell MFIA

*Risk Task Force*

Pamela Murray-Jones MFIA (Chair)  
Derek Minett MFIA  
John O'Donnell MFIA

**FIA GOVERNANCE STRUCTURE**



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**FROM THE CHIEF EXECUTIVE OFFICER**

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This is my fifth Annual Report since commencing work with FIA in mid-2004. It's been a fantastic journey and I warmly thank everyone who has supported our work over this time. In many ways, 2008 has been the most fulfilling as we have seen the culmination of FIA's seminal work on our Principles and Standards of Fundraising Practice and we have witnessed the recognition of FIA's role as Australia's peak body for professional fundraising nationally and internationally.

It has truly been a privilege to serve FIA's members and to watch the increasing professionalism with which they approach their work. The next phase of this is the proposed introduction of a new category of membership that will recognise members' commitment to Continuing Professional Development. Members have every reason to feel proud of the development of their knowledge and, if Constitutional amendments are adopted by members at the AGM in February 2009, their efforts to continually improve their skills will be obvious to their employers and to their donors.

We have worked hard on your behalf in 2008 and that has been possible because of the commitment of FIA's staff. I especially thank my fellow managers, Prabhleen Ahuja Policy and Standards Manager, Cindy Higgins Members Services Manager, Alys Baxter National Events Manager and Letchimi Karunanithy Finance and HR Manager who have supported my work and performed exceptionally in their own management roles.

Through my position at FIA I have enjoyed a number of opportunities to promote professional fundraising nationally and internationally, including the Ethics Committee of the Association of Fundraising Professionals (USA), the International Summit of Peak Fundraising Organisations and as a director of the National Roundtable of Nonprofit Organisations, roles I will relinquish when I step down from my position as FIA's CEO.

My engagement with five different boards since 2004 has been most rewarding. As your CEO I have been proud to work with your directors and to drive forward change which has seen FIA grow substantially, in membership, in income and in influence. I am leaving because it feels like the right time – we've accomplished a number of key programs, exceeding my expectations in 2004, and I feel it is now timely for a new CEO and a new board to chart the next direction.

I wish my colleagues, members and my friends in this sector well and look forward to working with you from a different perspective in 2009 and beyond.

Go FIA!



Sue-Anne Wallace PhD, FIACD, MFIA  
Chief Executive Officer and Company Secretary

### **CEO's Committees**

#### *Investment Committee*

Brian Holmes MFIA (Chair)  
Derek Minett MFIA  
Katie Whiffen, Fidelity Investments Australia Ltd.  
Tim Hardy, Enrich Australia/ National Australia Bank

#### *31<sup>st</sup> International Conference Committee (Perth) 2008*

Margaret Haydon FFIA (Chair)  
Angela Bowman CFRE MFIA  
Vicky Dodds MFIA  
Brian Holmes MFIA  
Lesley Hooper MFIA  
Diane Lim MFIA  
Fiona Paice FFIA  
David Pettigrew MFIA  
Jennifer Randell MFIA  
Tricia Slee MFIA  
Paul Tavatgis MFIA  
Vic Zacharias MFIA  
Troy Yerkovich MFIA (Chair Social Committee)  
Lucinda Ardagh MFIA  
Rebecca Eytel  
Birute Greenhalgh MFIA  
Anne Liddle MFIA  
Diane Lim MFIA  
Jennifer Piper

#### *Codes Task Force*

Jeremy Maxwell CFRE FFIA (Chair)  
Laurence Joseph CFRE FFIA  
Leo Orland FFIA  
Michelle Trevorrow CFRE MFIA

#### *32<sup>nd</sup> International Conference Committee (Sydney) 2009*

Jenni Elliott CFRE MFIA (Chair)  
Lisa Cheng MFIA  
Trish Egan MFIA  
Charlotte Grimshaw  
Jannine Jackson CFRE MFIA  
Martin Paul MFIA  
Julijana Trifunovic MFIA  
Savas (Vic) Zacharias MFIA

#### *MDU 2008*

Bronwyn Street CFRE FFIA (Chair)  
Maurice Henderson CFRE FFIA  
Sue James FFIA  
Mack Jones CFRE FFIA  
Clare MacAdam CFRE FFIA  
Mark Goldsmith MFIA

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## FROM THE HON TREASURER

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Having built up successive surpluses in 2005, 2006 and 2007, your directors resolved to invest some of the surplus funds in 2008 to consolidate FIA's activities. Surpluses over the past three years were \$72,311 (2007), \$131,597 (2006 with an additional \$106,000 deposited to the Library Trust Fund) and \$46,555 (2005), totally \$356,463 over the period.

Accordingly, at their first meeting in March 2008, the Board agreed to invest \$101,211 in FIA's IT infrastructure, development strategies and curriculum development, in addition to securing the organisational structure and staffing and the completion of FIA's codes project – the Principles and Standards of Fundraising Practice - building on FIA's growth in these areas over previous years. In August, directors revised this funding investment to \$150,000, in order to bring in additional consultant services to further develop FIA's work in professional development and fundraising (development and sponsorship).

As we know, our CEO is retiring from her position shortly following the Annual General Meeting in February 2009. It seems timely therefore to reflect on FIA's growth over the past five annual reports, 2004 – 2008 inclusive. FIA's income has grown from \$1,114,547 in 2004 to \$1,999,203 in 2008 (79% increase over 4 years). At the same time, FIA has significantly enhanced staff amenities through remuneration scales, office relocations in both Sydney and Melbourne, and benefits, including a bonus leave (shut down) period between Christmas and New Year. As a result of this focus on human resource management, career opportunities have opened up for staff and length of tenure of senior staff has increased. A number of staff have benefitted from promotions over this period including Antonella Webbstock (Book Keeper to Manager Finance and Human Resources), Cindy Higgins (Chapter 1 consultant to Members Services Manager) Prabhleen Ahuja (Executive Assistant to Manager Policy and Standards), and Alys Baxter (PA to CEO to National Events Manager).

In terms of FIA's revenue, membership income has increased from \$374,546 (2007) to \$401,454 (2008), sponsorship from \$190,777 (2007) to \$219,216 (2008) and interest is up to \$54,967 (2008) (compared with \$36,298 in 2007), while income from conference and professional development events has remained constant, and income from advertising and exhibitors has fallen slightly from \$245,564 in 2007 to \$227,470 (2008), largely due to the reduced exhibition space at the Perth conference.

At the same time expenditure on administration and advertising has fallen in comparison with 2007 expenditure, while expenditure on occupancy expenses (largely due to rent of expanded facilities in Sydney) and employee benefits (from \$661,335 in 2007 to \$874,502 in 2008) has risen, reflections of the board's strategy to consolidate growth in 2008.

Against an approved budget of \$150,000 deficit, the 2008 end of year result of \$118,732 deficit is a pleasing result.

During the year, FIA's Investment Committee continued to meet in order to provide the best advice to the Board on investment strategies. Although the Investment Committee identified a preferred supplier for FIA's investment strategy, currently FIA's funds are held in cash deposits, pending an improvement in the financial environment.

The fundraising campaign for the Library Trust Fund did not eventuate in 2008 and, as a result, the Board invested in consultant services to develop a coherent plan for a campaign which it is hoped will roll out in 2009.

Membership reached new heights in 2008 with total membership of 1,676 at 31 August 2008, up from 1,513 (2007) and 1,171 (2004), an increase of 43% over the four years,

although retention rate fell from 86% in 2007 to 80% in 2008. Chapter Executive Committees have played seminal roles in developing membership, from acquisition to retention and renewal, and are warmly thanked for their diligent and consistent work in this area.

Attendance at professional development events also continued to increase to 5,513 (2008) from 5,111 (2007) and 3,570 (2004), an increase of 54% over four years.

Sponsorship for chapter events rose in 2008 and total sponsorship (chapter plus national) increased by 15% to \$219,216.

FIA's employment advertising service, the largest job market place for fundraising professionals in Australia, continued to grow, showing a net 11% increase in 2008.

We have been well served by Antonella Webbstock (to September 2008) and Letchimi Karunanithy (from September 2008) in the management of FIA's financial reporting and analysis and Sue-Anne Wallace, who as Company Secretary, has managed ASIC's requirements regarding board appointments and the appointment of FIA's auditor.

The full audited Financial Report 2008 is available on FIA's website [www.fia.org.au](http://www.fia.org.au)

A handwritten signature in blue ink, appearing to read 'B. Holmes', with a long horizontal flourish extending to the right.

Brian Holmes MFIA  
Hon Treasurer



FINANCIAL REPORT FOR YEAR ENDED 31 DECEMBER 2008

**Income Statement**  
for the year ended 31 December 2008

	Note	2008 \$	2007 \$
Revenue	2	1,999,203	1,991,210
Administration expenses		(689,583)	(827,330)
Conference, seminar and workshop expenses		(414,137)	(307,777)
Occupancy expenses		(87,749)	(63,163)
Advertising and exhibition expenses		(26,443)	(39,892)
Employee benefits expense		(874,502)	(661,335)
Depreciation	3	(25,521)	(19,402)
		<hr/>	<hr/>
		(2,117,935)	(1,918,899)
		<hr/>	<hr/>
<b>(Deficit)/Surplus before income tax</b>		(118,732)	72,311
		<hr/>	<hr/>
<b>(Deficit)/Surplus after income tax expense</b>		(118,732)	72,311
		<hr/> <hr/>	<hr/> <hr/>

**Balance Sheet**  
as at 31 December 2008

		2008	2007
	Note	\$	\$
<b>ASSETS</b>			
<b>Current Assets</b>			
Cash	6	1,031,727	1,093,091
Receivables	7	259,072	184,977
Other assets	8	4,024	4,024
<b>Total current assets</b>		1,294,823	1,282,092
<b>Non current assets</b>			
Property, plant and equipment	9	61,211	78,279
<b>Total non-current assets</b>		61,211	78,279
<b>TOTAL ASSETS</b>		1,356,034	1,360,371
<b>LIABILITIES</b>			
<b>Current liabilities</b>			
Payables	10	122,536	133,648
Provisions	12	33,824	37,546
Deferred income	11	740,776	659,906
Funds held on trust		158,996	109,378
<b>Total current liabilities</b>		1,056,132	940,478
<b>Non-current liabilities</b>			
Provisions	12	-	1,259
<b>Total non-current liabilities</b>		-	1,259
<b>TOTAL LIABILITIES</b>		1,056,132	941,737
<b>NET ASSETS</b>		299,902	418,634
<b>EQUITY</b>			
Accumulated funds		299,902	418,634
<b>TOTAL EQUITY</b>		299,902	418,634

**Statement of Changes in Equity**  
**for the year ended 31 December 2008**

**2008**

	<b>Accumulated Funds</b>	<b>Total</b>
	\$	\$
Balance at 1 January 2008	418,634	418,634
Deficit for the year	(118,732)	(118,732)
	299,902	299,902
<b>Balance at 31 December 2008</b>	<b>299,902</b>	<b>299,902</b>

**2007**

	<b>Asset Revaluation Reserves</b>	<b>Accumulated Funds</b>	<b>Total</b>
	\$	\$	\$
Balance at 1 January 2007	94,017	346,323	440,340
Disposal in the year	(94,017)	-	(94,017)
Surplus for the year	-	72,311	72,311
	-	418,634	418,634
<b>Balance at 31 December 2007</b>	<b>-</b>	<b>418,634</b>	<b>418,634</b>

**Cash Flow Statement**  
**for the year ended 31 December 2008**

		<b>2008</b>	<b>2007</b>
	<b>Note</b>	<b>\$</b>	<b>\$</b>
<b>Cash from operating activities:</b>			
Receipts from members and customers		2,138,660	2,150,403
Payments to suppliers and employees		(2,246,538)	(2,223,292)
Interest Received		54,967	36,298
		<hr/>	<hr/>
<b>Net cash provided by (used in) operating activities</b>	15	(52,911)	(36,591)
		<hr/>	<hr/>
<b>Cash flow from investing activities:</b>			
Payment for property, plant and equipment		(8,453)	(50,643)
Proceeds on disposals		-	377,178
		<hr/>	<hr/>
<b>Net cash provided by (used in) investing activities</b>		(8,453)	326,535
		<hr/>	<hr/>
<b>Net increase (decrease) in cash held</b>		(61,364)	289,944
Cash at beginning of financial year		1,093,091	803,147
		<hr/>	<hr/>
<b>Cash at end of financial year</b>		1,031,727	1,093,091
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**Fundraising Institute Australia  
ACN 088 146 801**

**Independent Audit Report to the Members of Fundraising Institute Australia**

**Report on the Financial Report**

We have audited the accompanying financial report of Fundraising Institute Australia, which comprises the balance sheet as at 31 December 2008 and the income statement, statement of changes in equity and cash flow statement for the year ended on that date, a summary of significant accounting policies and other explanatory notes and the director's declaration.

**Director's Responsibility for the Financial Report**

The directors of the company are responsible for the preparation and fair presentation of the financial report in accordance with Australian Accounting Standards (including the Australian Accounting Interpretations) and the financial reporting requirements of the company's constitution. This responsibility includes establishing and maintaining internal controls relevant to the preparation and fair presentation of the financial report that is free from material misstatement, whether due to fraud or error; selecting and applying appropriate accounting policies; and making accounting estimates that are reasonable in the circumstances.

**Auditor's Responsibility**

Our responsibility is to express an opinion on the financial report based on our audit. We conduct our audit in accordance with Australian Auditing Standards. These Auditing Standards require that we comply with relevant ethical requirements relating to audit engagements and plan and perform the audit to obtain reasonable assurance whether the financial report is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial report. The procedures selected depend on the auditor's judgement, including the assessment of the risks of material misstatement of the financial report, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial report in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by the directors, as well as evaluating the overall presentation of the financial report.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Independence**

In conducting our audit, we have complied with the independence requirements of the Australian professional ethical pronouncements.

**Fundraising Institute Australia**  
**ACN 088 146 801**

**Independent Audit Report to the Members of Fundraising Institute Australia**

**Audit Opinion**

In our opinion the financial report of Fundraising Institute Australia is in accordance with the Corporations Act 2001, including giving a true and fair view of the company's financial position as at 31 December 2008 and of its performance for the year ended on that date and complies with Australian Accounting Standards (including the Australian Accounting Interpretations) and the Corporations Regulations 2001.

**KS Black & Co**

*Stuart H. Cameron*

**Stuart Cameron**  
**Partner**

Dated this 29th day of January 2009.

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## WHAT WE'VE DONE TOGETHER IN 2008

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2008 marked the 40<sup>th</sup> anniversary since the need for a professional association was mooted. FIA's predecessor organisation The Australasian Institute of Fundraising (TAIF) was then founded in 1972. From that small beginning in Victoria, with 35 members, FIA has grown to an organisation with a national and international reputation.

### *National peak body*

In 2008 we significantly enhanced FIA's capacity to provide information on fundraising to fundraisers, governments and the general public. During the year, 194 formal questions were answered on a range of policy and standards matters from legislation to reporting and from ethics to standards of professional practice. FIA's website was refreshed to make it easier for members to find information and pave the way for FIA to be a one-stop portal for information on fundraising. We regularly provided media comment to journalists through 2008, including appearances on *Sunrise* on Channel 7. FIA's CEO regularly liaised with government officers and ministers to provide advice on policy review and amendment.

The NSW Government funded the development of the *Fundraising Toolkit New South Wales*, a companion for the Queensland Toolkit launched in 2007. And in a complementary move, the Queensland Government has agreed to work with FIA to create Charities Week in Queensland, similar to the partnership between the NSW Government and FIA that has been successfully running for twenty years.

### *Principles and Standards of Fundraising Practice*

In 2008 we completed a project commenced in 2004 to review our professional codes, now launched as FIA's Principles and Standards of Fundraising Practice. During the course of this project, FIA commissioned research which allowed us to identify the key issues for fundraising in particular a need for industry codes of practice. In May 2005, FIA established a Codes Task Force to oversee the project. Led by Jeremy Maxwell CFRE FFIA and supported by Laurence Joseph CFRE FFIA, Leo Orland FFIA and Michelle Trevor CFRE MFIA, this project has involved an additional forty-two members and experts who contributed through working groups, providing their expert opinions on the development of appropriate standards. FIA is leading world understanding of the standards of fundraising best practice in a number of its newly-adopted standards, including standards of fundraising practice in charitable telemarketing, workplace giving, electronic fundraising, overseas aid fundraising and grant seeking.

Members make a mandatory commitment to uphold the reputation of professional fundraising through annual declaration to abide by FIA's Principles and Standards of Fundraising Practice.

### *Asia Pacific Forum*

FIA demonstrated its leadership role in our region by developing and hosting the first Asia Pacific Forum in Perth in February 2008. More than seventy-five delegates met to discuss three key issues -sustainability, training and development, and social entrepreneurship, and to frame a series of resolutions which formed the work plan for a regional steering group. The regional steering group met by teleconference to develop a second forum at FIA's *Change* conference in Sydney, ensuring that better representation was achieved from colleagues working in the region.

The regional steering group which has met from mid-2008 to develop the second Asia Pacific Forum has included our colleagues:

From Philippines	Rica Lane (Fund Philippines) Rafael Lopa (Micro Ventures Incorporated, Philippines)
From United Kingdom	Lindsay Boswell (CEO, Institute of Fundraising) Simon Collings (CEO, Resource Alliance)
From USA	Andrew Watt (Chief Programs Officer, Association of Fundraising Professionals)

From New Zealand      Johan Vos (Chairman, Fundraising Institute of New Zealand)

From Australia          Paul O’Callaghan (CEO, Australian Council for International Development, Canberra)  
 Natalie Walker (CEO, Aboriginal Employment Strategy, Sydney)

**Professional association**

FIA is the peak and logical professional association for professional fundraisers and charitable and nonprofit organisations. In 2007 organisational membership was introduced so that organisations could be more closely connected with FIA and contribute to our advocacy work. Such was the level of support in 2008 that we had 77 organisational members with a combined turnover in excess of \$1billion. With this backing we have had greater authority to negotiate with governments and have achieved a number of significant milestones in 2008, culminating with the references to FIA’s work in the report of the Senate Economics Committee, tabled in parliament on 4 December 2008.

**Individual members**

The following members were elected as fellows at the AGM in February 2008 – Lyn Buckley CFRE FFIA (now Lyn Walsom), Sharon Hillman CFRE FFIA and Margaret Haydon CFRE FFIA.

Individual membership remains the cornerstone of FIA’s membership body. Since 2004, FIA’s membership has increased by 43% and has the potential to grow further. This work is ably managed by Cindy Higgins and her team from our Melbourne office, along with the regular contact with individual members enquiring about new membership or renewals and registration for FIA’s chapter events.

An increasing number of advertisements placed on our website, the largest Australian market place for fundraising positions, require FIA membership as a selection criterion and we will work to increase the number of employees who recognise the value of this professional status.

**Chapter Executive Committees**

Commitment at the chapter levels remains the backbone of FIA’s work with the development of professional development and training programs, mentoring, special interest groups etc. Members who voluntarily assist in their chapters, some on chapter executive committees, others on specific committees, are warmly acknowledged and listed below in this Annual Report.

Chapter 2 remains the largest chapter with 580 members, an increase of 42 on 2007. However, following on from the conference held in Perth, Chapter 5 increased its membership by 20 to 138, a growth of 17%; Chapter 3 added 12 members to 269 and both chapters 6 and 7 added 3 members, to 32 and 33 respectively, while Chapter 4 added 8 members. Chapter 1 held its membership at 462.

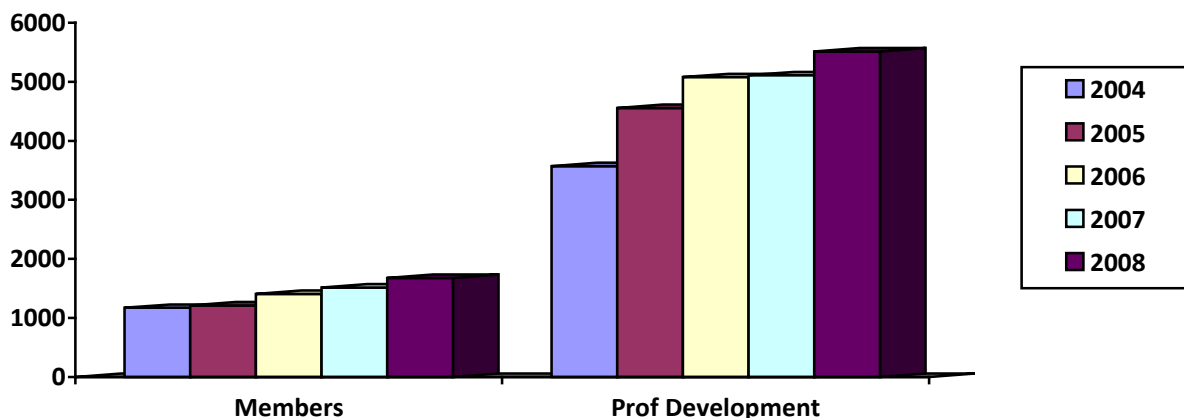


Figure 1 Number of members and attendances at PD events



## *FIA's 31st International Fundraising Conference Perth 2008*

FIA had not before held a conference in Perth so it was a brave decision by the board some years back to take the February conference there. By the time the conference took place, excitement had risen to fever pitch and the event was even more successful than could have been anticipated, both with regard to its program and the superb location in Perth alongside the Swan River. An additional benefit has been the subsequent increase in membership in Chapter 5 as noted above, thanks especially to the follow-up efforts of the Chapter 5 Executive Committee. Being located on the western coast of Australia also provided an opportunity to develop a program focussed on partnerships in the Asia Pacific region. FIA's first Asia Pacific Forum booked out quickly and provided a platform for FIA to develop new relationships with near neighbours.

The Chapter 5 Conference Committee is to be congratulated on the development and implementation of the Perth Conference, particularly Margaret Haydon FFIA who pitched for the conference while a director and led the committee in developing the program over the next two years. The Perth Committee is listed below and we extend our warmest thanks for their fantastic efforts in creating a most successful professional conference.

### *Thank you to our volunteers*

Members' engagement in supporting FIA's work at chapter, regional and national levels, actively contributing to FIA programs, keeping abreast of their own continuing professional development and serving on committees and the board, is the life blood of FIA. We offer sincere thanks to everyone who has assisted in so many different capacities, from FIA's Library Resource Centre to chapter executive committees in each state. For a complete list of our volunteers please see later in this report.

### *Training provider*

#### *Curriculum Development*

FIA's Board has committed resources in 2007 and again in 2008 to ensuring that the professional development programs which FIA runs have the highest standards and the most up-to-date materials. As a result, in 2008 we rolled out the new curriculum in Skills 1 and Skills 2. Feedback from participants, and return bookings for Skills 2 from graduates of Skills 1, has been even better than expected. Presenters have also appreciated the new resource materials, which guide their presentations and ensure that all presenters, wherever located, have a common curriculum to teach. This program is becoming increasingly important as a primary training program in fundraising, a fact reflected in the growing numbers graduating from the Skills courses.

We have worked with St James Ethics Centre in 2008, and will continue to do so in 2009, to develop a national curriculum for ethics training. It is intended that this will be delivered in every chapter in 2009.

FIA's Diploma in Fundraising Management remains the only qualification available in fundraising and we are seeing continuing interest in both the certificate and diploma. In 2008, seven students have graduated with the Certificate in Fundraising Practice, two with a Statement of Attainment and eight with the Diploma of Fundraising Management, Trevor Bailey MFIA, Peter Treseder MFIA, Michelle Jewels MFIA, Ingrid Bjerre, Janey Bloomfield MFIA, Siluvappan Guntipilli Chinappa, Julie Marshall MFIA and Guy Houghton MFIA.

In 2009, the Board will review FIA's Professional Development Pathway and further develop the tools and resources on which other programs are built. In addition, following the achievement of Madison Down Under's tenth anniversary, a review will be undertaken to ensure that MDU retains the quality of program and delivery for which it is renowned.

## Company limited by guarantee

FIA continues to be structurally sound, financially sustainable and a well managed company with diversified sources of income. While management provides timely analysis for directors with regular financial reports and the Audit and Finance Committee provides separate advice to the Board. In 2008 our funds were raised as follows:

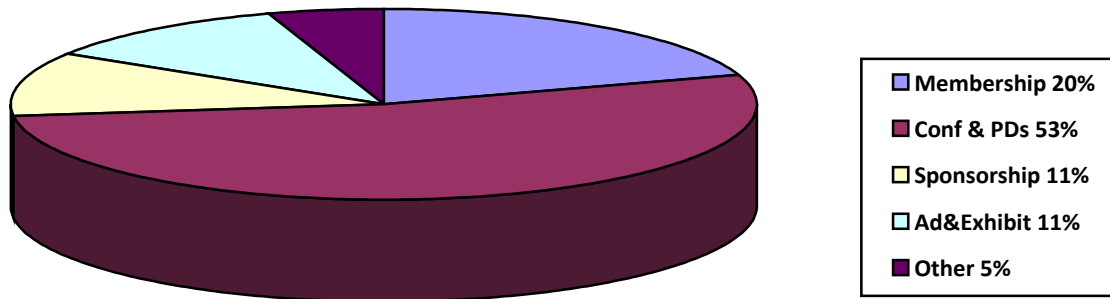


Figure 2 Sources of Income 2008

In 2008 Directors voted to contribute surplus funds to consolidating FIA's rapid and profitable growth over the previous four years and preparing for future directions. As a result, your directors have approved a strategy for the development of two streams of professional development and training programs, a development concept and strategic plan for its implementation and a fundraising strategy for the Library Trust Fund towards its twentieth anniversary in 2013. These strategies are expected to be further developed and implemented commencing in 2009.

### *Policies and Procedures*

FIA has invested time and effort in ensuring its policies and procedures are documented, reviewed and disseminated to those impacted by their implementation. Some policies were developed by board committees, while others were developed by FIA management.

Internal promotion in FIA now provides career opportunities and in 2008 FIA's remuneration structure was amended to ensure that FIA could secure staff in a competitive environment. FIA staff takes up a 'staff' category of membership and abide by the same code of professional practice as FIA's members.

All committee members and FIA's directors receive an FIA manual outlining their roles and responsibilities, and clearly defining staff and volunteer roles. These are updated every year and will be published as fifth editions in 2009. FIA also reviews the Strategic Plan (2008 – 2012) annually. The Business Plan is reviewed in March each year at the inaugural meeting of the new board.

All policies and procedures are gathered in an online manual, *The Manual of Policy and Procedure*, commonly referred to as the MOPP.

### *Library Resource Centre*

Two special volunteers have assisted us in 2008 in developing FIA's Library Resource Centre, under the management of Stephanie Wong, Policy Officer. Miranda Harrowell and Bruce Whittet have worked voluntarily in the LRC cataloguing every item, shelving and generally bringing order to other archival materials. We will lose Miranda's services in February when she takes off on a lengthy overseas trip. She has been a goldmine for FIA, bringing thirty years of local government library experience to our collection. In return we have assisted Miranda in growing her skills in fundraising to support her other voluntary effort, a children's book collection, *Aora Childrens Literature Research Centre* (St Peters NSW).

## FIA Organisational Membership

FIA continues to protect its brand to ensure integrity of FIA's products, from membership services and professional development to advocacy. We have locked our logo so that it cannot be copied from the website. Organisational members may use an organisational member logo, demonstrating their commitment to ethical principles and standards of professional conduct.



## Sector Relations

FIA has partnerships with both nonprofit and commercial enterprises to ensure the best availability of resources and expertise to meet its objectives. In 2008, memoranda of understanding were signed with Fundraising Institute of New Zealand (FINZ), the Association for Healthcare Philanthropy (AHP, USA), Institute of Fundraising (IoF, UK) and Association of Development and Alumni Professionals in Education (ADAPE, Aus).

FIA has played a key role in representing professional fundraising in wider forums relating to the nonprofit sector, including contributions to expert panels with the Federal, Queensland, NSW and Victorian Governments. Although FIA has provided fewer written submissions in 2008 than previous years, those written have been more significant, in particular, FIA's role in the national discussion on a compact for the sector and the Senate Economics Committee's (SEC) enquiry into *The Disclosure Regimes for Charities and Nonprofit Organisations*. FIA appeared at a hearing of the SEC, a record of which is lodged with Hansard.

## Staff

FIA continues to be blessed with loyal staff. In particular we thank Cindy Higgins, who has been with us four years, and Prabhleen Ahuja, whose service is coming up to two years, for their commitment in their roles in Member Services and Policy and Standards respectively.

Letchimi Karunanithy was appointed Finance and HR Manager in September 2008, replacing Antonella Webbstock, who, along with successive honorary treasurers, was instrumental in providing a better structure and understanding of FIA's financial reporting.

FIA is now in a position to provide for career structure and it was pleasing to note through 2008 that Alys Baxter was promoted to National Events Manager, Stephanie Wong to Policy Officer, Judy Orford to Member Services Officer and Jessica de Araugo to Marketing & Communications Coordinator.

Three staff who have performed outstandingly in 2008 are Stephanie Wong, Policy Officer (on the principles & standards of fundraising practice project, government relations and volunteer management), Judy Orford (awards, Charities Week, chapter elections) and Jessica de Araugo (communications and chapter registrations).

Consultants have provided expert services in 2008 including Louise Steer LLB (principles & standards of fundraising practice project), Jay Ocampo (events), Anne Gribbin CFRE MFIA (development and professional development and training) and Evelyn Mason CFRE FFIA (sponsorship).

We are delighted to recognise all staff and thank them for their service. Permanent full and part-time staff as at 31 December 2008:

Dr Sue-Anne Wallace FAICD MFIA Chief Executive Officer

Prabhleen S Ahuja MFIA Policy & Standards Manager

Stephanie Wong AMFIA Policy Officer

Marianne Ramsay AMFIA Policy & Standards Assistant  
 Letchimi Karunanithy AMFIA Finance & HR Manager  
 Cathie Howard AMFIA Finance Administrative Assistant  
 Alys Baxter AMFIA National Events Manager  
 Lauren Edgar AMFIA National Events Assistant  
 Cindy Higgins MFIA Member Services Manager  
 Judy Orford AMFIA Member Services Officer  
 Jessica de Araugo AMFIA Marketing & Communications Coordinator  
 Amy Robin AMFIA Chapter Events Assistant  
 Nirasha De Silva AMFIA Membership Assistant  
 Lee Newcombe AMFIA Membership Assistant

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## WHAT WE'VE ACHIEVED AGAINST OUR STRATEGIC OBJECTIVES AND GOALS IN 2008: FIA'S KEY PERFORMANCE MEASURES

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### Goal 1: Advance professional fundraising

- 1.1. *Build on FIA's role as the peak body for professional fundraising*
- 1.2. *Ensure FIA provides a good governance model in the sector*
- 1.3. *Manage FIA's resources so the organisation is effective and efficient in its work*

Key Performance Measure	Actual					Target				
	04	05	06	07	08	08	09	10	11	
Attendance at Board Meetings	80%	75%	86%	90%	87.5%	90%	90%	90%	90%	
% of actions from Board meetings completed	N/A	N/A	98.7%	100%	91.4%	98%	98%	98%	98%	
Number of submissions made to government or other reviews	-	12	10	13	9	Dependent on the number reviews/enquires being conducted				
Debt ratio at 31 December	54%	66%	63%	61%	78%	To be determined				
Current ratio at 31 December	81%	95%	111%	154%	122%	To be determined				
Unqualified audit	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Media Briefings	-	-	33	58	55	To be determined				

### Goal 2: Advocate standards in professional fundraising

- 2.1. *Develop principles and standards of professional fundraising practice*
- 2.2. *Develop Library Resource Centre (LRC)*
- 2.3. *Develop relations and partnerships with government, the sector and business*

Key Performance Measure	Actual					Target			
	04	05	06	07	08	08	09	10	11
Status of principles and standards of professional fundraising practice.	N/A	N/A	N/A	37.5%	100%	100%	Review ongoing		
Volunteer hours to assist with operations of library resource centre.	N/A	N/A	116	0	800				
Number of formal sector partnerships.	4	4	4	6	4				
DFM enrolments	-	-	53	65	60				
Representation on government or professional committees (number committees).	3	4	5	7	5				
Total visits to FIA website	100,000	123,000	142,000	268,171	289,372	300,000	350,000	400,000	450,000

### Goal 3: Develop professional pathways

- 3.1 Develop and manage residential professional development programs for national audiences
- 3.2 Develop and manage professional development programs for state and regional audiences
- 3.3 Develop resources to support fundraisers in their professional development

Key Performance Measure	Actual					Target			
	04	05	06	07	08	08	09	10	11
Total attendance at PD events	3570	4557	5078	5111	5513	5500	6000	6200	6300
Growth Rate of PD Events against three year average	N/A	N/A	N/A	16.1%	12.2%	10%	10%	10%	10%
Total number PD events delivered	N/A	N/A	N/A	97	106	-	-	-	-
Conference Registrations	395	445	662	822	625	659	750	440	TBC
Attendees MDU	62	103	109	105	100	110	120	TBC	TBC
Overall satisfaction for each PD activity by attendees (Average satisfaction measured on a five point scale for all National and State based FIA PD events )	Data not available			4.3	4.0	>4.5	>4.6	>4.6	>4.6

### Goal 4: Promote measurable credentials

- 4.1 Implement a Continuing Professional Development (CPD) system to elevate members professional standards and reputation in business and the broader community.
- 4.2 Position CFRE as the premier credential for professional fundraisers
- 4.3 Develop national curricula for FIA's training programs

Key Performance Measure	Actual					Target			
	04	05	06	07	08	08	09	10	11
Number of CFRE resident in Australia	60	59	65	70	72	74	78	82	86
Number of new CFRE resident in Australia	4	5	8	7	5	8	8	8	8
Number of CFRE applicants resident in Australia	7	5	11	9	7	12	12	12	12
Number of FIA published job advertisements that list CFRE as a required or desirable qualification.	N/A	N/A	N/A	N/A	15				
Number of FIA published job advertisements that list FIA membership as a required or desirable qualification.	N/A	N/A	N/A	N/A	51				
Number of FIA training programs with national curricula.	2	2	3	2	3	5	4	5	4

### Goal 5: Develop membership

- 5.1 Support FIA members
- 5.2 Grow FIA's membership
- 5.3 Develop and deliver member services

Key Performance Measure	Actual					Target			
	04	05	06	07	08	08	09	10	11
Individual Membership Numbers	1171	1210	1407	1513	1676	1600	1680	1768	1856
Organisational Membership Numbers <sup>3</sup>	N/A	N/A	N/A	60	77	75	80	85	90
Annual Membership Growth Rate	N/A	3.3%	16.3%	11.7%	7%	5.0%	5.0%	5.0%	5.0%
Annual Membership Retention rate	N/A	78.0%	81.6%	86%	80%	85%	85%	85%	85%
Membership Tenure	N/A	4.54	5.43	7.14	5	7	7	7	7

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## CERTIFIED FUND RAISING EXECUTIVES (CFRE) AS AT 31 DECEMBER 2008

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### VIC

Michelle Trevorrow CFRE MFIA  
 Ronald Fairchild CFRE MFIA  
 David Mark Hindle CFRE MFIA  
 Laurence Joseph CFRE FFIA  
 Don Lewis CFRE MFIA  
 Graham McKern CFRE FFIA  
 William Roath CFRE MFIA  
 Bronwyn Street CFRE FFIA  
 Brian Reid CFRE MFIA

### NSW

Debbie Beder CFRE MFIA  
 Christopher Benaud CFRE FFIA  
 Michael LeCouteur CFRE MFIA  
 Timothy Matthews CFRE FFIA  
 Lindsay May CFRE FFIA  
 John Townend CFRE FFIA  
 Phil Wilson CFRE FFIA  
 Evelyn Mason CFRE FFIA

### QLD

Nigel Harris CFRE FFIA  
 Daniel McDiarmid CFRE FFIA  
 Kenneth Edwards CFRE MFIA  
 Wayne Clarke CFRE FFIA  
 Simone Garske CFRE MFIA  
 Margaret Scott CFRE FFIA  
 Bernadette Mann CFRE MFIA  
 Lesley Ann Ray CFRE MFIA  
 Jeffrey Buchanan CFRE MFIA

**VIC**

Judith Sproats CFRE MFIA  
 Jeremy Maxwell CFRE FFIA  
 Simone Rosel CFRE MFIA  
 Patricia Roath CFRE MFIA  
 James Garland CFRE MFIA  
 Susanne Williamson CFRE MFIA  
 Jennifer Doubell CFRE MFIA  
 Jennifer Elliott CFRE MFIA  
 Peter Fletcher CFRE FFIA

**SA**

Tracey Brown CFRE MFIA  
 Maurice Henderson CFRE FFIA  
 John Kramer CFRE MFIA  
 James Mackay Jones CFRE FFIA  
 Jason Shauness CFRE MFIA  
 Clare MacAdam CFRE FFIA  
 Fiona Blinco CFRE MFIA

**NSW**

John Herring CFRE MFIA  
 Janice Pavey CFRE MFIA  
 Alicia Watson CFRE MFIA  
 Joy Barrett CFRE MFIA  
 Peter Treseder CFRE MFIA  
 Marilyn Rickard CFRE MFIA  
 Alex Green CFRE MFIA  
 Jannine Jackson CFRE MFIA  
 Andrew Markwell CFRE MFIA  
 David Osborne CFRE MFIA

**WA**

Janice Yerkovich CFRE FFIA  
 Patrick Callahan CFRE MFIA  
 John Pritchard CFRE MFIA  
 Michelle Fraser CFRE MFIA  
 Heiko Plange-Korndoerfer  
 CFRE MFIA  
 Angela Bowman CFRE MFIA

**QLD**

Leigh Ellen Cleave CFRE MFIA  
 Jane Thompson CFRE MFIA  
 Katherine Davis CFRE MFIA  
 Joanna Garner CFRE MFIA  
 Anne Gribbin CFRE FFIA  
 Lyn Walsom CFRE FFIA

**ACT**

Judith Ford CFRE MFIA

---

## CHAPTER EXECUTIVES COMMITTEES AND CHAPTER SUB-COMMUNITIES 2008

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THANK YOU TO ALL OUR VOLUNTEERS WHO ARE SO COMMITTED  
 TO FIA – YOUR PROFESSIONAL ASSOCIATION!

**CHAPTER 1**

Sharon Hillman FFIA, President  
 Peter Burnett MFIA, Vice  
 President  
 James Garland MFIA, Treasurer  
 John Allen FFIA  
 Kristine Ash MFIA  
 Gail Breen MFIA  
 Peter Fletcher CFRE FFIA  
 Sharon Hillman FFIA  
 Zoe Karkas MFIA  
 Lee Orland FFIA  
 Karen McIver MFIA  
 Helen Smith MFIA  
 Nola Wilmot MFIA

**Monthly Professional**

Helen Smith MFIA  
 John Allen FFIA

**Special Interest Groups**

Nola Wilmot MFIA  
 Frank Chamberlain MFIA  
 Helen Smith MFIA  
 David Oliver MFIA  
 Alison Hill MFIA

**CHAPTER 2**

Joy Barrett MFIA President  
 Judy Aarsen MFIA VP/Treasurer  
 Robin Dougherty MFIA  
 Natasha Duncan MFIA  
 Luke Edwards MFIA  
 Andrew Markwell MFIA  
 Derek Minett MFIA  
 Savas Zacharias MFIA  
 Leanne Zalpa MFIA

**Charity Awareness Week  
- 2008 Committee**

Brian Daniels MFIA Chair  
 Julie McDonald MFIA  
 Cherie McKenna  
 Jerry McNamara  
 Lynn Varvel  
 Barbara Ward MFIA

**Award Judges**

Joy Barrett MFIA  
 Marilyn Rickard CFRE MFIA  
 Carol Ireland MFIA  
 Andrew Markwell MFIA  
 Brett de Hoedt

**CHAPTER 3**

Nigel Harris CFRE FFIA President  
 Jo Garner CFRE MFIA VP  
 Rob Needham AMFIA Treasurer  
 Dyllys Bertelsen MFIA  
 Kathy Davis CFRE MFIA  
 Fiona Douglas MFIA  
 Craig Cravestein MFIA  
 Anne Gribbin CFRE FFIA  
 Rebecca Hazell MFIA  
 Jenny Mansell-Black MFIA  
 Laird Marshall MFIA  
 Kath Moore MFIA  
 Lesley Ray CFRE MFIA  
 Margaret Scott CFRE FFIA

**Speakers and Events**

Adrian Sergeant  
 Andrew Douglas MFIA  
 Bianca Ousley MFIA  
 Billie-Jay Porter MFIA  
 Fiona Hackett  
 Heather Watson  
 Helen Styles  
 Hilary Clarke AM MFIA  
 Jane Thompson CFRE MFIA  
 Jeff Cheverton  
 Jennifer Robertson

## **Skills**

Zoe Karkas MFIA  
Sharon Hillman FFIA  
Jeremy Maxwell CFRE FFIA  
Gail Breen MIFA  
Peter Burnett MFIA

## **Communications**

Tina Price MFIA  
Jonathon Joseph MFIA  
Michelle Caldwell MFIA

## **Conference**

Peter Fletcher CFRE FFIA  
David Oliver MFIA  
Michelle Trevorrow CFRE MFIA  
Kristine Ash MFIA  
Gail Breen MFIA  
Sue Oakley MFIA

## **Awards**

Peter Fletcher CFRE FFIA  
Peter Burnett MFIA

## **CEO Forum**

John Allen FFIA  
Gary Conyers  
Zoe Karkas MFIA  
James Garland MFIA  
Jess deAraugo AMFIA  
Michael Grigoletto

## **Membership**

Kerryn Mclver MFIA  
James Garland MFIA

## **Mentoring Program**

Leo Orland FFIA  
Michelle Trevorrow CFRE MFIA  
Sophie Demos

## **Sponsorship**

Kris Ash  
Gail Breen

## **CHAPTER 4**

Mark Goldsmith MFIA President  
Rebecca Goodman MFIA

## **Speakers and Events**

Diana Ryall  
Hon Graham West  
Robert McDougall  
Ashley Rose  
Kate Burt  
Trudi Mitchell MFIA  
Debra O'Neill MFIA  
Sue Cowden MFIA  
Cheryl Sedun  
Nick Gangemi  
Joy Barrett MFIA  
Matthew Bellotti  
John Shaw MFIA  
Greg Campitelli MFIA  
Kylie Laurence  
Leanne Zalapa MFIA  
Karen Armstrong  
Vera Visevic MFIA  
Jill Ruchel  
Luke Edwards MFIA  
Gavin Thomson MFIA  
Denis Tracey MFIA  
John Reid AO  
Brett Goodyer

## **Skills 1 Presenters**

Derek Minett MFIA  
Tim Mathews CFRE FFIA  
Martin Paul MFIA  
Vic Zacharias MFIA  
Simon Davie  
Luke Edwards MFIA  
Mark Lees MFIA

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The Mailing House

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President/Treasurer  
Tony Hume MFIA Vice President  
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Fiona Paice FFIA  
Anne Liddle MFIA  
Birute Greenhaigh MFIA  
Jennifer Randell MFIA  
Vicky Dodds MFIA  
Lesley Hooper MFIA  
Marianne Scartozzi MFIA

## **Speakers and Events**

Jock Beveridge MFIA  
Jon Duschinski  
Kathy Knott MFIA  
Kay Blackburn  
Dr Kim Madden  
Lisa Bundesen  
Marcass Blease MFIA  
Margot Fraser  
Megan Dodd MFIA  
Miriam Airey  
Prof Myles McGregor-Lowndes  
OAM MFIA  
Nathan Betteridge  
Paul Gaffney  
Peter Treseder AM CFRE MFIA  
Phil Smith  
Rebecca Hass  
Richard Woodward MFIA  
Sarah McBratney  
Scott Bulger MFIA  
Steven Banks MFIA  
Dr Ted Flack FFIA  
Vicki James MFIA  
Dr Wendy Scaife MFIA

## **CHAPTER 6**

Bruno Yvanovich MFIA President  
Jackie Hobbins AMFIA  
Norm Dobson MFIA  
Di Kargas MFIA  
Belinder Barnier MFIA  
Kate Jennings AMFIA  
Ric Bennett MFIA  
Judy Ford CFRE MFIA

## **Speakers**

Brian Reid CFRE MFIA  
Christine Ellis MFIA  
Danielle Krajina  
Vern Reid MFIA  
Ian Liddell MFIA  
Rebecca Stewart  
Robyn Sermon  
Tania Hudson  
Tricia Slee MFIA  
James Shaw  
Alan Fisher  
Anne Russell-Brown  
Lindsay May CFRE FFIA  
Joe Calleja MFIA  
Peter Hotchkin MFIA  
Warren Palmer MFIA  
Kimberley Heitman  
Cheryl Mariner MFIA  
Rhonda Flottman MFIA  
Catherin Cassarchis



## CHAPTER 4

VP/Treasurer

Tracy McNamara MFIA

Kim Jacobson MFIA

Linda Alsina MFIA

Kellie Bartlam MFIA

Michael Elwood MFIA

Maurice Henderson CFRE FFIA

Lisa Rossi MFIA

### Speakers

Ashley Knoote-Parke

Marcus Blease MFIA

Hailey Cavill

Richard Steyen

Tim Hardy MFIA

## CHAPTER 7

Harry Wilsdon MFIA President

Anita Gowers MFIA President

Melita Griffin MFIA VP/Treasurer

Nicolle Ferry MFIA

Christie Sweeting MFIA

Meredith Burch MFIA

Jane Crosswell MFIA

Stuart Foster MFIA

Cathie Shirley MFIA

Susan Sussems MFIA

### Speakers and Events

Natasha Andrews MFIA

Peter Castleton FFIA

Bob Holderness-Roddam

## CHAPTER 5

### Speakers and Events

Jo Agnew

Brian Grindrod

Lyn-Marie Hegarty MFIA

Lucinda Ardagh MFIA

Kate Miller

Richard O'Connell

Suzanne Cavanagh

Caroline Bryndzej MFIA

Anthony Hasluck

Rick Hart

Cameron Schwab

John Pritchard CFRE MFIA

Troy Yerkovich MFIA

Jan Yerkovich CFRE FFIA

Janene Bon

Philip Simmonite

Helen Rowe MFIA

Marc Loveridge

Gavin Bain

Derry Simpson

Vicki Rasmussen MFIA

Alicia Sinclair AMFIA

Tim Elleston

Dom Christopher Power

Diane Lim

### Speakers

James Boyd MFIA

Angela Bowman MFIA

Sam Smith

Trevor Richards

Graham Lovelock

Sophie Hamdorf

Rosanna Vinci

Angela Holt

Rebecca Eytel

Kerry Kelleway

Verity James

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# PRINCIPLES AND STANDARDS OF FUNDRAISING PRACTICE WORKING PARTIES

---

### Standard of Events Fundraising Practice

Mr Maurice Henderson CFRE

FAHP FFIA

Miss Rebecca Goodman MFIA

Mrs Sandra Kilmore MFIA

Ms Denise Rowe

### Standard of Face to Face Fundraising Practice

Ms Nicola Worth

Ms Zoe Mason

Ms Alicia Infanti

Mr Will Pye

### Standard of Face to Face Fundraising Practice

Ms Kellie Phelps

Ms Leigh Stewart

### Standard of Workplace Giving Fundraising Practice

Mr Brian Reid CFRE FCA MFIA

Ms Donna O'Neill

Ms Nikki Johnston

Ms Margaret Smith

### Standard of Electronic Fundraising Practice

Ms Tania Burstin AMFIA

Mr Michael Kearney

Mr Andrew Vagg

Ms Joanne Booth MFIA

### Standard of Charitable Gaming Fundraising Practice

Mr Justin Bobbermein

Ms Tatiana Sapozhenkova MFIA

Ms Sharon Hillman FFIA

### Standard of School Fundraising Practice

Ms Gailene Keen

Ms Joanne Hutchens MFIA

Mr Andrew Rowley

Ms Michele Dunn

### Standard of Direct Mail Fundraising Practice

Mr Nicholas Campbell

Ms Vicky Young

Mr Lindsay May CFRE MFIA

Ms Alice Walter

### Standard of Overseas Aid Fundraising Practice

Mr Greg Molyneux

Ms Sue MacKinnon

Mr Simon Miller

**Standard Bequests Fundraising Practice**

Ms Helen Smith MFIA  
Ms Nola Wilmot MFIA  
Ms Susan Pitt MFIA  
Ms Trish Brawn MFIA

**Standards of Grants Fundraising Practice**

Dr Michael Liffman  
Mr Keith Roberts  
Dr Wendy Scaife MFIA

**Standard of Charitable Telemarketing Fundraising Practice**

Ms Leonie Aberdeen  
Mr Shannon Laverack MFIA  
Mr Dennis O'Reilly FFIA

**LIBRARY RESOURCE CENTRE VOLUNTEERS**

Miranda Harrowell  
Bruce Whittet

**SPONSORS**

FIA warmly thanks its sponsors, whose assistance allows us to provide an excellent range of services to professional fundraisers.

*National Sponsors*

**Principal Corporate Sponsor:** Advanced Solutions International (ASI) Asia Pacific



**Chapter Sponsors**

FIA warmly thanks UBS (Sydney) and Goldman Sacks JBWere (Sydney and Melbourne) for their support of FIA's committees.

**CHAPTER 1**

**Principal Partners**

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Robe John & Associates

**Major Sponsors**

Donor Management  
First Direct Solutions

**CHAPTER 2**

BDO Kendalls

**Supporting Sponsors**

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Apple Telemarketing  
NGO Recruitment

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Australia Post  
Mail Makers

**CHAPTER 6**

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Hotel Realm  
University House, ANU  
Australia Catholic  
University