

# ANNUAL REPORT 2017



Fundraising Institute Australia



FIA launches  
sector developed  
self-regulation



Protect vulnerable  
people, supply chain  
accountability

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# About Fundraising Institute Australia

**FIA, an association of professionals, advances philanthropy through encouraging and supporting people and organisations to ethically practice excellence in fundraising.**

The core activities through which FIA fulfils this mission include professional development, mentoring, credentialing, research and advocacy.

Since its establishment in 1968 (originally under the banner of 'The Australasian Institute of Fundraising'), FIA has had a profound impact on increasing professionalism in fundraising. Our purpose is to make the world a better place by advancing professional fundraising through promotion of standards, professional development pathways and measurable credentials so that our members achieve best practice.

## Membership

FIA is the only professional association to exclusively serve the needs and interests of Australia's fundraising professionals. Members of the Institute are individuals and organisations who are engaged substantially in the profession of fundraising. They share a common bond in their commitment to their profession and to the ideals of philanthropy.

FIA continues to take a lead role in the direction and development of fundraising in Australia and has achieved significant outcomes for the sector and for fundraisers individually.

FIA membership acknowledges the commitment of individuals and organisations to demonstrate ethical fundraising practice and reflects their leadership in the not-for-profit sector.

Members sign up each year to abide by the FIA Code and therefore uphold the ethical and professional standards of fundraising.

**Public trust is imperative to achieving your mission! A charities reliance on the fundraising dollar is growing and to achieve your goals you must have the trust of the public.**

FIA wants all Australians to know they have a right to be reassured their charity is fundraising and managing their funds in a transparent and accountable manner and urges all professional fundraisers and charities undertaking fundraising activities to join as members and display the 'Tick of Confidence'.



## Public Acknowledgement of Membership

FIA encourages members to promote their commitment to professionalism through their association with FIA by publicly displaying these logos.



Individual membership demonstrates ethical fundraising practice and signifies a professional fundraiser. This logo is a public demonstration of your commitment to the FIA Code.

Individual members are also entitled to use post-nominals which acknowledge their level of experience as a professional fundraiser.



The organisational member logo is a symbol to donors and stakeholders of the member organisations commitment to ethical fundraising practice. This logo can appear on letterheads, promotional materials and websites.

## Advancing Professional Fundraising

FIA's work falls into three key areas:



### Underpinning all FIA programs is the knowledge that we exist to serve our members

To do this, we rely heavily on a network of over 200 volunteers across the country who go where our staff can't. These hard-working volunteers sit on a variety of professional committees contributing their expertise to ensure that all the FIA programs are achieved and providing networking and educational opportunities across the country. We are grateful to each and every one for their contribution to FIA's growth and esprit de corps.

FIA keeps you in touch with your colleagues, provides mentoring for new members, investigates trends and issues of significance to the fundraising sector and consults with industry and government in setting standards for fundraising practice.

### To succeed in the fundraising sector today you need:

- ✓ strong credentials
- ✓ the latest fundraising information
- ✓ excellent networking opportunities
- ✓ access to sector-specific training

**Make sure you have access to all this and more.**

# Regulatory and Public Affairs

## FIA launches new Code

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The most important initiative undertaken by FIA in 2017 was the launch of the new Code for professional fundraising in Australia. Following an extensive review and consultation overseen by FIA's Sustainability Taskforce, the Board of Directors approved the new Code in June. Written in concise, plain English and with accompanying practice notes, the self-regulatory Code aims to raise standards of conduct across the sector by going beyond the requirements of government regulation. The Code introduces protections for people in vulnerable circumstances, greater supply chain accountability, compliance oversight by an independent Code authority, and Code training for all fundraisers.

## New Code Authority established

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Administration of the Code is the responsibility of an Code Authority, established in October. Chaired by former Senator Ursula Stephens, the seven-member Code Authority comprises charity, donor, consumer and supplier representatives. It is responsible for compliance monitoring, complaints handling and making recommendations for improvements to self-regulation. FIA is putting other measures in place including a Code monitor who will 'mystery shop' members to ensure fundraisers are adhering to the Code.

FIA believes these initiatives will bolster public confidence in the sector and reduce pressure for heavier government regulation of fundraising. Throughout 2017, the CEO met with an array of government officials to brief them on the new model, as well as various federal and state ministers and shadow ministers. The meetings were positive and there was strong interest in the training component of the Code, with several staff of government agencies and departments participating in testing of the web-based training platform.

## Fundraising swept up in Australian Consumer Law reform

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FIA was deeply involved in discussions around the Australian Consumer Law (ACL) Review, making several written submissions and participating in forums with regulators. We argued successfully for a light-touch regulatory approach through the development of 'guidance' on how the ACL applies to the sector. A key priority throughout the process was to preserve the tax deductible status of donations and to differentiate fundraising from the sale of consumer goods and services.

## ACNC review

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The Federal Government announced a review of the ACNC and sought FIA input. FIA has proposed the review clarify the regulator's role in relation to fundraising, over which it currently has no specific mandate. FIA has argued for a bigger role for self-regulatory codes as recommended by the Productivity Commission.

## Red tape reduction

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FIA continued to work with the ACNC and state and federal regulators to ease the regulatory burden for members. This included a submission to the Treasury department arguing that annual reporting to the ACNC would simplify the current reporting system for Deductible Gift Recipients (DGRs) of multiple categories and registers, and ensure that charities with DGR status are operating lawfully.

## Some states reduce reporting burden

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FIA applauded changes to the ACT Charitable Collections legislation removing the need for charities registered there to report both to the ACNC and ACT bureaucracies. The move brings the ACT into line with South Australia, Victoria and Tasmania who have all reduced reporting duplication. While these measures are welcome, they do not remove the bulk of multi-jurisdictional requirements. FIA will continue to lobby for a greater range of exemptions for ACNC-registered and FIA Code-compliant charities.

## NSW government strengthens powers to investigate 'dodgy' charities

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In August, the NSW government passed legislation to give greater powers to authorities investigating 'dodgy' charities. FIA expressed concern about regulatory overkill, noting other authorities have sufficient powers to investigate and prosecute fraud and misleading/deceptive conduct. The CEO met with Minister for Better Regulation, Matthew Kean, to gain assurance of NSW's continuing commitment to red tape reduction in the sector.

## F2F issues on the boil

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Face-to-face fundraising came under attack on several fronts with investigations by the Fair Work Ombudsman into workplace practices, the Australian Consumer and Competition Commission examining contract arrangements, the Queensland Office of Fair Trading questioning commissions paid to 3rd party fundraisers, and the National Union of Workers accusing one fundraising agency of exploiting staff and misleading donors over the cost of fundraising.

FIA worked closely with the Public Fundraising Regulatory Association (PFRA) to defend face-to-face fundraising, meeting regularly with government officials and challenging inaccurate and often biased media reports.

## Unsolicited communications by charities targeted by ACMA

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The Australian Communications Media Authority informed FIA that it has adopted "unsolicited communications" on behalf of charities as a "priority compliance area" for 2017-18, focusing on email (spam) and telemarketing. FIA has committed to work closely with the ACMA to improve member compliance both with statutory regulations and FIA's self-regulatory Code.

## Consumer watchdog 'Choice' attacks Do Not Call exemption

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A campaign to remove the charitable exemption to the Do Not Call register by consumer group Choice continued throughout 2017 with close to 39,000 consumers signing a petition. FIA countered with a commitment, through its Code and system of self-regulation, to better manage donor preferences at the supplier and charity level.

# State of the Sector

Charities in Australia are innovative, well managed and well regarded, ranking as the fifth most trusted institutions in the country, according to a 2017 report published by the Australian Charities and Not-for-profits Commission (ACNC). Only doctors, police, the High Court of Australia and the Australian Tax Office hold higher public trust ratings.

The 2017 *Public Trust and Confidence in Australian Charities* report<sup>1</sup> also found that 86 per cent of Australians trusted charities while 91 per cent supported them by volunteering or donating. Australians contributed \$11.2 billion in donations and bequests, and charities benefited from the support of three million volunteers, equating to billions of dollars in value.

Announced in December, the 2017 *Charity Reputation Index*<sup>2</sup> – conducted each year by research consultants AMR in conjunction with the global Reputation Institute (RI) – reported that Australia's 40 largest charities still have excellent reputations. The Index showed that Australians most trusted charities that helped individuals with physical illness or emergency situations. Royal Flying Doctor Service confirmed its place as Australia's most stable, robust and reputable charity, ranking first in the annual Index for the seventh year running. St John Ambulance took second place for the second year in a row, while CareFlight ranked third for its overall reputation, the first year the charity has been included in the survey.

Organisations assisting people with physical disabilities were also rated highly by Australians, with Guide Dogs Australia ranking fourth and the Fred Hollows Foundation in sixth place. Charities that help children also polled strongly in 2017, with Camp Quality ranking fifth, Starlight Children's Foundation ranking seventh and CanTeen ranking eighth overall.

On the international front, Australians proved they remain incredibly generous with the 2017 World Giving Index<sup>3</sup> ranking Australia as the sixth most generous nation in the world, based on criteria such as donating, volunteering and helping a stranger.

Closer to home, the *Australian Charities Report 2016*<sup>4</sup> examined the annual information statements of more than 52,000 charities. Released in December 2017, this report found that Australian charity revenue jumped to \$142.8 billion in the last year with charities reporting an overall increase in revenue, but also a fall in donations. However, charities have proven innovative and resourceful, diversifying the way they raise funds to deliver services. Nearly half of all charity revenue in 2016 was generated through membership fees, user-pays services, and other income sources, demonstrating charities can deliver services to the community in a "more sustainable and robust manner."

Meanwhile, the National Bank of Australia's (NAB) most recent quarterly *Consumer Anxiety Index*<sup>5</sup> rose slightly, reversing the trend of falling anxiety since mid-2015. The Index noted that "the cost of living (64.2 points) still weighs most heavily on consumers" and highlights the big disconnect between low levels of economy-wide inflation and consumer-focused costs. More than one in five (22 per cent) of consumers reported high levels of concern over the cost of living.

Despite this, Australians still showed their charitable side, with online donations lifting slightly in the 12 months to August 2017. According to the *NAB Charitable Giving Index*<sup>6</sup>, which measures charitable giving through online channels, giving increased by 1.4 per cent over this period, taking the increase from 2010, the year the Index was established, to 37 per cent (\$1.9 billion, the largest annual amount recorded) or around 60 per cent of total gifts and donations reported by individuals through the ATO in 2014-15. The average donation size now stands at \$355 per donor.

<sup>1</sup> 2017 Public Trust and Confidence in Australian Charities report

<sup>2</sup> 2017 AMR and RI Charity Reputation Index

<sup>3</sup> Charities Aid Foundation's 2017 World Giving Index

<sup>4</sup> The Australian Charities Report 2016 (Centre for Social Impact and Social Policy Research Centre, UNSW Australia)

<sup>5</sup> NAB Consumer Behaviour Survey Q2 2017

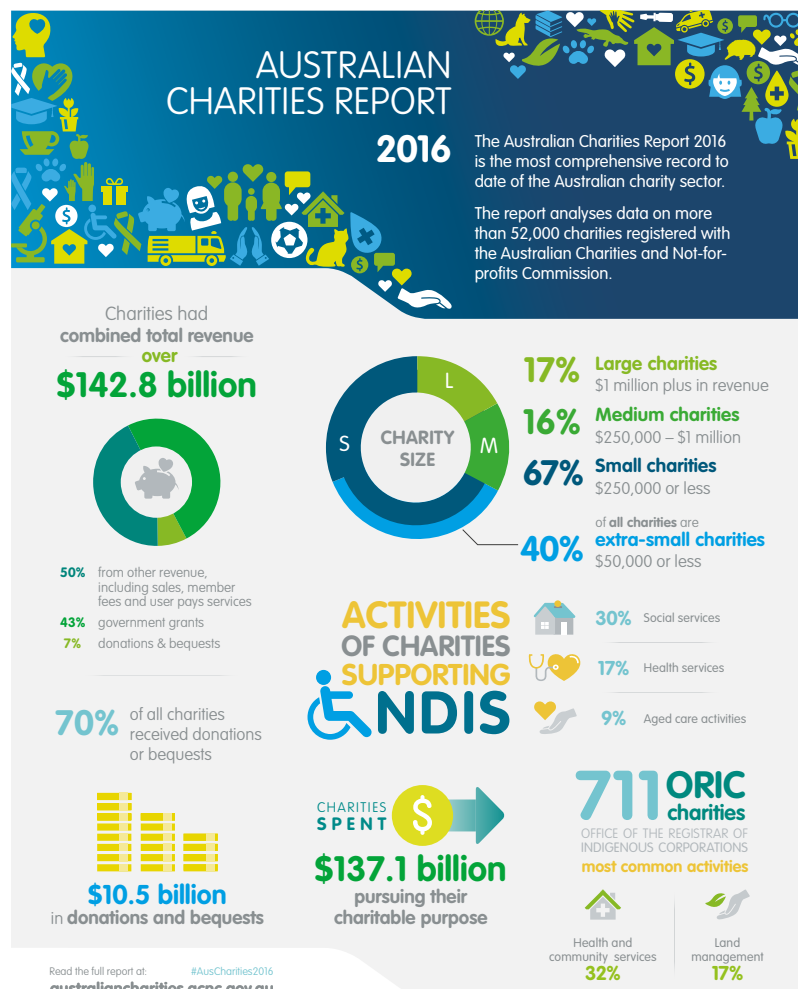
<sup>6</sup> NAB Charitable Giving Index, August 2017 (12 months to August 2017)

The state with the highest growth in giving was South Australia (7.4 per cent) with more modest gains reported in other states. Western Australia posted the worst results, experiencing a -3.0 per cent fall in donations growth, no doubt exacerbated by the WA economy contracting sharply over the year to June 2017. Humanitarian service charities still attracted the biggest share of total online charity giving (about 32 per cent of all donations). These charities also dominated market share in all states except Queensland where charitable lotteries led the way.

The international *2017 Trends in Giving*<sup>7</sup> report concluded that Australians, along with their Kiwi counterparts, “are well known for being generous” and have embraced online giving as new fundraising services have become widely available to charities over the last decade. It noted that 54 per cent of Australasian donors prefer to give online and 31 per cent are most inspired to give via social media with Facebook (66 per cent) the channel that most inspires giving.

Finally, below is an infographic from the Australian Charities Report 2016<sup>8</sup> with more data about the finances and sustainability of Australia’s charity sector. This report was produced in partnership by the ACNC and the Centre for Social Impact and the Social Policy Research Centre at the University of New South Wales.

<http://australiancharities.acnc.gov.au/wp-content/uploads/2017/12/2016-Charities-report-infographic-web.pdf>



Australian Charities and Not-for-profits Commission



<sup>7</sup> Global Trends in Giving Report 2017

<sup>8</sup> The Australian Charities Report 2016 (Centre for Social Impact and Social Policy Research Centre, UNSW Australia)



# Chair's Report

**On behalf of the Board of Directors, it gives me great pleasure to present Fundraising Institute Australia's annual report for 2017. It has been a landmark year for FIA as the Institute implemented new initiatives to bolster donor confidence in fundraising and promote long-term sector sustainability.**



You may recall that last year FIA formed a Task Force to examine stronger mechanisms of self-regulation for fundraisers. Following an extensive review and member consultation, FIA released an exposure draft of a Code for professional fundraising at our 40th annual Conference in February. After more member consultation, the Board of Directors approved a new Code for the sector in June. Informed by the International Statement of Ethical Principles in Fundraising, the Code aims to raise standards of conduct across the sector by going beyond the requirements of government regulation.

To accompany the Code, we established an independent Code Authority in October to monitor member compliance. It is chaired by Dr Ursula Stephens, a former parliamentarian, educator and social entrepreneur who possesses an excellent understanding of the NFP sector. Dr Stephens, who led the formation of the ACNC, is joined by six well-respected fundraising leaders, sector suppliers and consumer advocates. Together, they will investigate complaints and apply sanctions as necessary. They will be aided in their task by a Code Monitor who will conduct regular spot checks to ensure fundraisers are meeting their obligations under the Code.

It is important to remember that we have only one chance to shape the Australian regulatory environment. By demonstrating that our members are responsible and ethical in their dealings with donors we will build regulator as well as community trust and confidence. This Code may also help to counter some of the negative media stories that once again dogged aspects of fundraising in 2017. Overall, we believe this approach is the way we will be spared the tough regulation and burden of expense that is now the lot of our counterparts in the UK.

While the Code is here to guide fundraisers towards best practice, the FIA National Awards for Excellence in Fundraising are always a pleasant reminder of the collective good work and the role of fundraisers in improving our society. The 2017 Awards Gala on the Gold Coast, with its elegant black and gold art deco theme, was attended by 360 fundraisers. As always the event showcased the best campaigns of the year, examining both creativity and effectiveness, as well as honouring the finest fundraisers and outstanding volunteers. Entering the awards can be an effort, but I'm sure the winners would agree that it is worth burning some midnight oil to do it!

In 2017, FIA remained in good shape financially with pleasing membership growth. FIA enters 2018 in a strong position to build on the successes of the past 12 months and invest in future initiatives to benefit members.

People are what make FIA's many activities and events come to life. As Chair I have had the opportunity to engage with all FIA state (and ACT) branches, and attend many of their events. It is at this level that I have witnessed the collegial nature of our State Committees as they provide local professional development and networking opportunities for our members, all on a volunteer basis.

On behalf of the FIA Board I would like to thank all FIA State Committee Chairs and members for the countless hours and enormous energy and creativity they bring to events. We could not call FIA a truly national organisation without the efforts of our many dedicated volunteers around the country.

On the knowledge front, FIA believes in the importance of keeping on top of the latest learnings and trends. Life-long learning really is a 'must' in our sector and the FIA education team works hard to deliver quality education programs to fundraisers at all levels. But we could not offer so many in-class or online subjects without the inspirational FIA course tutors who develop and teach these courses every year. Their work in sharing knowledge to advance the skills of fundraisers is greatly appreciated.

My time is now up as Chair of the FIA Board of Directors and I want to warmly thank my fellow Board members for their sound counsel and sense of humour over the past few years. I believe we have worked very well as a team and I know each member has demonstrated a strong commitment to professional fundraising and best practice. I shall miss working with you. I also take this opportunity to warmly welcome James Garland as Chair-elect. James is Director of Garland Blanchard and a successful consultant in the areas of fundraising, business strategy and brand management. I know he will bring a fresh perspective and considered approach to his role as Chair.

I thank those who are stepping down:

- TAS – Sophie Davidson MFIA
- NSW – Andrew Giles FFIA
- VIC – Zoe Karkas FFIA
- QLD – Benjamin Cox FFIA

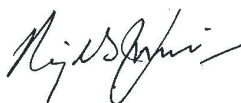
Thank you for the service you have given FIA and your fellow fundraisers.

At the same time, I welcome the new members of the Board:

- VIC – Ben Holgate MFIA
- NSW – Stephen Mally FFIA CFRE
- QLD - Meredith Dwyer FFIA CFRE
- TAS – Michelle Folder MFIA
- NSW – Jim Hungerford MFIA

I have no doubt you will contribute greatly to the FIA membership and the broader sector.

Finally, on behalf of the Board, I wish to thank our CEO Rob Edwards and the dedicated staff around him who work long and hard to serve the membership. As the great American football coach Vince Lombardi once said: "The achievements of an organisation are the results of the combined effort of each individual." Nowhere is this truer than at FIA. Thank you all.



Nigel Harris FFIA CFRE  
Chair

# Chief Executive Officer's Report

A STRONG  
FINANCIAL POSITION

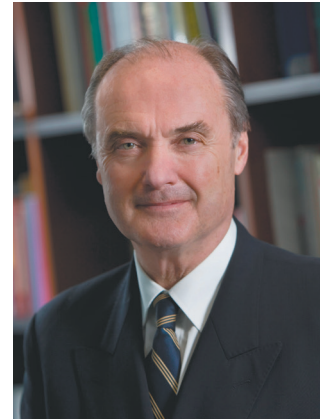
As we close the books on 2017, member support for FIA remains strong and this has translated to a sound financial position, giving us the resources to meet the significant challenges that lie ahead.

## A new strategic plan

In 2017 FIA set out on an ambitious three-year mission to reinvent itself as the voice for fundraising in Australia. I am pleased to report we are already making good progress on that journey.

In charting the strategic course, the Board, with input from its Taskforce on Sector Sustainability, considered the challenges of a changing marketplace and took a bold decision to position FIA as an 'industry' as well as a 'professional' body, representing the interests of fundraising in all its many facets: organisations, professional fundraisers and suppliers to the sector.

Our dedication to promoting professional fundraising will be fundamental to remaining relevant for the future. FIA will retain the individual member category and continue to provide professional development, networking, information and other services to individual fundraisers. In parallel, a concerted effort will be made to enlist not-for-profits as core business. This means, in effect, pursuing a two-pronged approach: organisations subscribing to best practice in fundraising and professional fundraisers delivering on the promise.



## Defending your interests

FIA represents all fundraising channels and a broad spectrum of charities, not-for-profits, suppliers and individuals. This gives us a platform to speak on behalf of fundraising as an activity practised both professionally and on behalf of Australian and international not-for-profit organisations.

We used that platform effectively in 2017 to achieve a positive outcome from the Government's Review of the Australian Consumer Law. As the Review began, there was a justified concern that a new blanket of regulation would be pulled across our sector, possibly putting at risk the tax deductibility of gifts. In the end, the unique position donors occupy in the marketplace was recognised and protected through Regulatory Guidance specific to our sector. Throughout this process, FIA worked effectively with a coalition of sector players, providing leadership at key moments and helping to ensure a single, unified sector voice was heard by Government.

Criticism of fundraising methods and costs continued to dog the sector throughout the year. Serious misconceptions persist in the media and in some policy circles that charities should have little or no fundraising costs and that every dollar raised should go straight to service delivery. At the same time, charities are expected to be run in a business-like manner with proper governance standards, workplace conditions, and professional staff who are remunerated in accordance with up-to-date wage rates.

There is evidence this relentless criticism is starting to erode donor support. Research by the ACNC showed trust in charities and the number of people giving had dipped slightly in the past year. Meanwhile, the newly appointed Commissioner of the ACNC has signaled his intention to use its five years of charity reporting data to give donors more information to help them make choices. Clearly there is much more work to be done to change the public debate around fundraising from one of costs to one of value.

## Self-regulation

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The Sustainability Taskforce concluded a major revision of our Code, introducing important new governance and accountability measures along with protections for people in vulnerable circumstances and those feeling overwhelmed by the number of charitable solicitations they are receiving.

A key feature of the new system is web-based Code training for all fundraisers, which is intended to raise awareness of ethical fundraising practice and create a new platform for engagement with individual members. A new independent Code Authority chaired by former Senator Ursula Stephens will monitor compliance and deal with any complaints.

Substantial work needs to be done to bolster member understanding of, support for, and adherence to FIA's Code and system of self-regulation if that system is to be an effective bulwark against further government regulatory intervention.

## Investing in professionalism

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FIA has invested heavily in updating and developing its portfolio of training courses and professional development pathways. Professionalism is at the core of FIA's member value proposition. Building and maintaining this program will be key to sustaining FIA's relevance in the market.

FIA has a strong position as the provider of the sector's 'not-to-be-missed' annual Conference. In 2017 the Conference brought fundraisers to the Gold Coast from all across Australia to share the latest thinking and to hear from the very best in the business.

Our network of state branches enables FIA to rightfully claim a national footprint. Events throughout the year contributed significantly to the perception of value among members and gave a voice to fundraisers everywhere on issues affecting their success.

In 2017, I travelled around the country to listen to members' views about what we do well and what we can do better. As always, I have been impressed with the expertise I have encountered as well as the passion and willingness of members to volunteer their time and considerable skills to support FIA. I urge you to stay involved with your Institute. Your active engagement makes it all possible.

I am proud of what we have achieved and very appreciative of the hard work put in by member volunteers, our Board and State Committee Chairs, and especially my team at the secretariat, to support the fundraising community. In particular, I would like to thank outgoing Chairman Nigel Harris for his wise and steady leadership of the Board and his good counsel to me through what has been an important period of transition for FIA. I look forward to welcoming incoming Chairman James Garland as we begin the work of shaping a stronger and more productive fundraising sector for the benefit of Australia and the world.



Rob Edwards  
Chief Executive Officer

# Honorary Treasurer's Report

It is my pleasure as your Treasurer to present the Financial Report for the year ended 31 December 2017 as audited by K S Black & Co.

## Summary of the Financial Results

While the last few years have seen FIA building reserves, 2017 has been a year of consolidation and investment in order to achieve the outcomes of the new strategic plan that provided for an operating deficit of \$138k. This deficit was reduced to \$62k a pleasing result given the outcomes achieved.

This result has been achieved built on the success of FIA's conference followed by membership renewals exceeding budget, consistently strong jobs advertising revenue and the development of new income streams within the education program.

This year saw the finalisation of the online versions of all core education modules as well as the development and introduction of the online Codes course which is essential training for all fundraisers and particularly for FIA members. We are now able to offer face to face and online versions of all core educational modules. These new offerings as well as growth in the number of activities held throughout Australia over the year has maintained FIA's overall engagement levels of nearly 6,500 attendees at FIA events.

These results would not be possible without the significant contribution of our secretariat and over 200 extraordinary volunteers who participate on various FIA committees and contribute their expertise to deliver programs, networking and educational opportunities across Australia.



## Operating Environment

2016 saw the appointment of a key committee of sector leaders and an FIA executive to drive the sector sustainability review which culminated this year in a major revision of the FIA Code, introducing new governance and accountability measures as well as protection for those in vulnerable circumstances.

The surpluses achieved in prior years has allowed FIA to invest retained earnings in this valuable body of work.

We have also continued to grow a portfolio of education products and professional development pathways with offerings now available for fundraisers at any point in their career

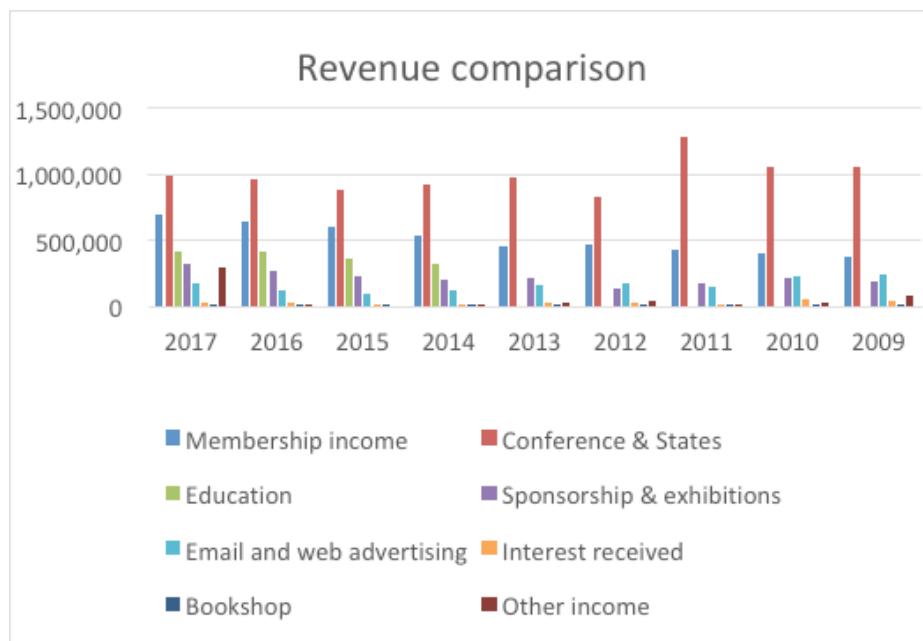
The Include a Charity campaign continues to go from strength to strength with attendees increasing by just over 50% this year with events held all around Australia.

## Income

FIA continues to achieve pleasing income growth from conference, membership, advertising services, education and Include a Charity. It should be noted that the income from contributors to the Include a Charity campaign is only applied to the expenses of this campaign and FIA effectively 'ring fences' this income for that purpose.

While attendance at state events may be down on last year's record highs sponsorship of state and territory events continues to grow with all local committees developing their member engagement activities.

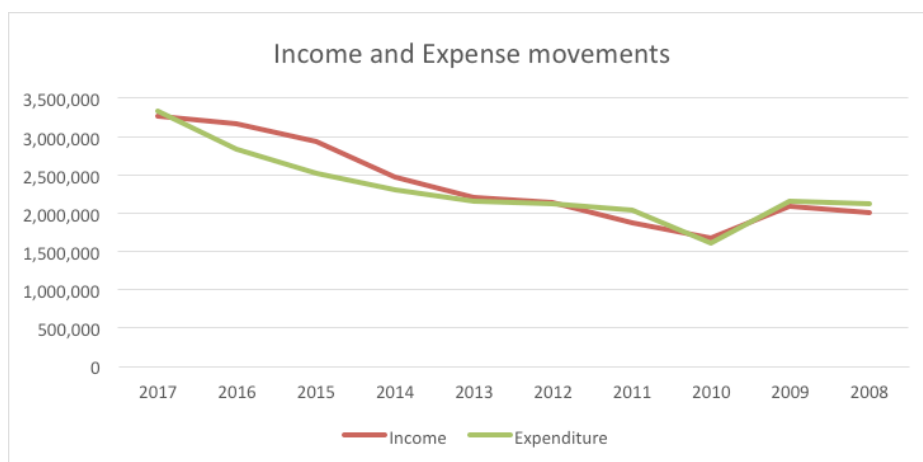
The chart below shows the income contribution from each revenue stream highlighting the weight of each key area of the business.



## Expenses

Continued focus has been applied to reducing costs across all functions where possible while investing in the work of self-regulation, codes training and the development of educational pathways for all fundraisers.

The chart below shows the movement of total income and expenses from 2008 to 2017.



## Our Financial Position

The deficit of \$62k is the outcome of the decision taken to invest from reserves to build the business for the future. Reserves on hand at year end are \$1.05m ensuring that there is a retained cash balance sufficient to meet commitments and future needs. The Board's work in positioning FIA as the voice of fundraising and the investment made this year has enabled us to meet the milestones necessary to achieve this goal. There has been a net cash outflow of \$104k this year reducing our cash position to \$2.4m at year end.

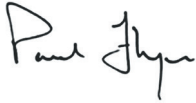
## Finance and Audit Committee

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Thank you to my fellow committee colleagues for their support, guidance and dedication to FIA:

Nigel Harris FFIA CFRE  
Brian Holmes FFIA CFRE  
Joe Shannon B. Comm CA

The committee is grateful to Directors for their diligence and active participation in the financial stewardship of FIA, and I commend the staff of FIA for their efforts in achieving the outcomes reported here for 2017.



Paul Flynn MFIA  
Honorary Treasurer

# Financial Reports

for Year Ended 31 December 2017

Statement of Profit or Loss and Other Comprehensive Income for the year ended 31 December 2017

	Note	2017 \$	2016 \$
Revenue	2	3,270,363	3,177,515
Administration expenses		(138,761)	(54,900)
Conference, workshop and campaign expenses		(1,705,807)	(1,589,743)
Occupancy expenses		(127,730)	(102,076)
Employee benefits expense		(1,350,751)	(1,074,915)
Depreciation and amortisation	3	(9,721)	(8,613)
		(3,332,770)	(2,830,247)
<b>Deficit before income tax</b>		<b>(62,407)</b>	<b>347,268</b>
<b>Deficit after income tax expenses</b>		<b>(62,407)</b>	<b>347,268</b>



Statement of Financial Position as at 31 December 2017

		2017	2016
	Note	\$	\$
<b>ASSETS</b>			
<b>Current assets</b>			
Cash and cash equivalents	6	2,451,266	2,571,011
Receivables	7	236,846	231,107
Other assets	8	2,800	1,000
<b>Total current assets</b>		<b>2,690,912</b>	<b>2,803,118</b>
<b>Non-current assets</b>			
Software, plant and equipment	9	20,660	15,051
Development costs	18	-	-
<b>Total non-current assets</b>		<b>20,660</b>	<b>15,051</b>
<b>TOTAL ASSETS</b>		<b>2,711,572</b>	<b>2,818,169</b>
<b>LIABILITIES</b>			
<b>Current liabilities</b>			
Payables	10	191,690	214,607
Provisions	12	91,553	65,765
Deferred income	11	1,276,112	1,363,566
Funds held on trust		53,177	20,373
<b>Total current liabilities</b>		<b>1,612,532</b>	<b>1,664,311</b>
<b>Non-current liabilities</b>			
Provisions	12	40,441	32,852
<b>Total non-current liabilities</b>		<b>40,441</b>	<b>32,852</b>
<b>TOTAL LIABILITIES</b>		<b>1,652,973</b>	<b>1,697,163</b>
<b>NET ASSETS</b>		<b>1,058,599</b>	<b>1,121,006</b>
<b>EQUITY</b>			
Accumulated funds		1,058,599	1,121,066
<b>TOTAL EQUITY</b>		<b>1,058,599</b>	<b>1,121,066</b>

## Statement of Changes in Equity for the year ended 31 December 2017

2016	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2016	773,738	773,738
Surplus for the year	347,268	347,268
<b>Balance at 31 December 2016</b>	<b>1,121,006</b>	<b>1,121,006</b>

2017	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2017	1,121,006	1,121,006
Deficit for the year	(62,407)	(62,407)
<b>Balance at 31 December 2017</b>	<b>1,058,599</b>	<b>1,058,599</b>

## Statement of Cash Flows for the year ended 31 December 2017

		2017	2016
	Note	\$	\$
<b>Cash from operating activities:</b>			
Receipts from members and customers		3,582,507	3,471,694
Payments to suppliers and employees		(3,700,460)	(3,154,940)
Interest received		13,538	21,430
<b>Net cash generated from (used in) operating activities</b>	<b>14</b>	<b>(104,415)</b>	<b>338,184</b>
<b>Cash flow from investing activities:</b>			
Payment for non-current assets		(15,330)	(6,224)
<b>Net cash used in investing activities</b>		<b>(15,330)</b>	<b>(6,224)</b>
<b>Net (decrease) increase in cash and cash equivalents held</b>		<b>(119,745)</b>	<b>331,960</b>
Cash and cash equivalents at beginning of financial year		2,571,011	2,239,051
<b>Cash and cash equivalents at end of financial year</b>	<b>6</b>	<b>2,451,266</b>	<b>2,571,011</b>

Level 6  
350 Kent Street  
SYDNEY NSW 2000

75 Lyons Road  
DRUMMOYNE NSW 2047

**K.S. Black & Co.**

ABN 48 117 820 556

20 Grose Street  
North Parramatta NSW 2151

PO Box 2210  
North Parramatta NSW 1750

**AUDITOR'S INDEPENDENCE DECLARATION UNDER SECTION 307C OF THE CORPORATIONS  
ACT 2001 TO THE DIRECTORS OF FUNDRAISING INSTITUTE AUSTRALIA**

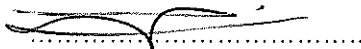
I declare that, to the best of my knowledge and belief, during the year ended 31 December 2017 there has been:

- i. no contraventions of the auditor independence requirements as set out in the *Corporations Act 2001* in relation to the audit; and
- ii. no contraventions of any applicable code of professional conduct in relation to the audit.

KS Black & Co  
Chartered Accountants

Scott Bennison  
Partner


Dated in Sydney on this 27<sup>th</sup> day of January 2018



Scott Bennison  
Partner

Phone 02 8839 3000  
Fax 02 8839 3055

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scheme approved  
under Professional  
Standards Legislation



  
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AUSTRALIA • NEW ZEALAND

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## INDEPENDENT AUDITOR'S REPORT

To the Members of Fundraising Institute Australia

### Opinion

We have audited the accompanying financial report of Fundraising Institute Australia, which comprises the Statements of financial position as at 31 December 2017, the statements of profit or loss and other comprehensive income, the statements of changes in equity and the statements of cash flows for the year then ended, notes comprising a summary of significant accounting policies and other explanatory information, and the directors' declaration of the company.

In our opinion, the accompanying financial report of the company is in accordance with the Australian Charities and Not-for-profits Commission Act 2012, including:

- i) giving a true and fair view of the Company's financial position as at 31 December 2017 and of its financial performance for the year then ended; and
- ii) complying with Australian Accounting Standards and the financial reporting requirements of the Australian Charities and Not-for-profits Commission Regulation 2013.

### Basis of opinion

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the 'Auditor's responsibilities for the audit of the financial report' section of our report. We are independent of the Company in accordance with the auditor independence requirements of the Act and the ethical requirements of the Accounting Professional and Ethical Standards Board APES 110 *Code of Ethics for Professional Accountants* (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We confirm that the independence declaration required by the Act, which has been given to the responsible entities of the Company, would be in the same terms if given to the responsible entities as at the time of this auditor's report.

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

### Other information

The responsible entities are responsible for the other information. The other information comprises the information in the Company's annual report for the year ended 31 December 2017, but does not include the financial report and the auditor's report thereon.

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Our opinion on the financial report does not cover the other information and we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial report, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial report or our knowledge obtained in the audit or otherwise appears to be materially misstated.

If, based on the work we have performed, we conclude that there is a material misstatement of the other information we are required to report that fact. We have nothing to report in this regard.

### **Responsible Entities' responsibility for the financial report**

The responsible entities are responsible for the preparation of the financial report that gives a true and fair view in accordance with Australian Accounting Standards and the Act and for such internal controls as the responsible entities determine is necessary to enable the presentation of the financial report that gives a true and fair view and is free from material misstatement, whether due to fraud or error.

In preparing the financial report, the responsible entities are responsible for assessing the Company's ability to continue as a going concern, disclosing as applicable, matters related to going concern and using the going concern basis of accounting unless the responsible entities either intend to liquidate the Company or to cease operations, or have no realistic alternative but to do so.

### **Auditor's responsibility for the audit of the financial report**

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this financial report.

A further description of our representation of our responsibilities for the audit of the financial report is located at The Australian Auditing and Assurance Standards Board website at: <http://www.auasb.gov.au/Home.aspx>. This description forms part of our auditor's report.

KS Black & Co  
Chartered Accountants

Scott Bennison  
Partner

Dated: 29/1/18

Sydney

Phone 02 8838 8000  
Fax 02 8838 8055

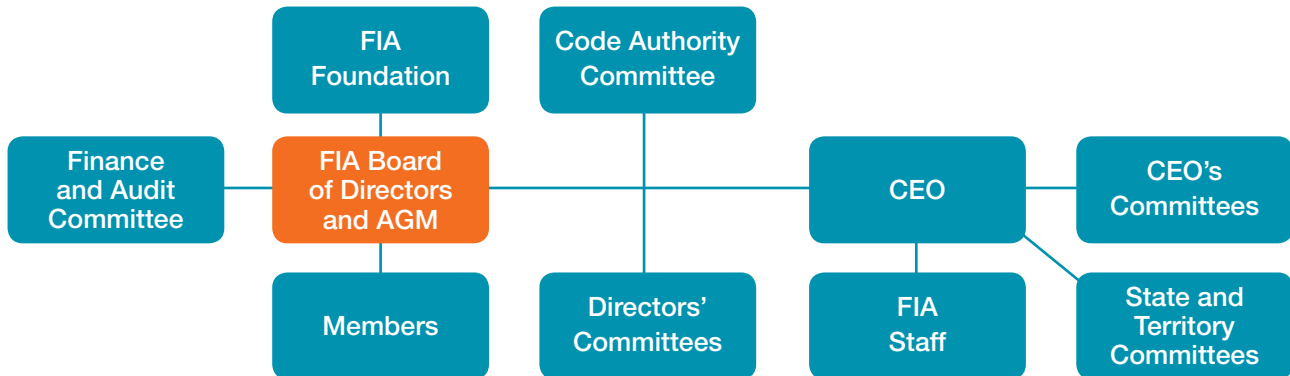


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# FIA Governance Structure

FIA is committed to achieving and demonstrating the highest standards of corporate governance and conducting our business in a transparent and honest framework.



## Board of Directors

The business and affairs of FIA are managed by the Board of Directors. The Board strives to build sustainable value for FIA's members and the fundraising industry and to achieve our mission of advancing philanthropy in partnership with industry and government.

Directors are elected for a two-year term, with the possibility of renewal for a period not exceeding six years. This period allows for the Board to establish continuity of governance, a style of authority and leadership that is compatible with its vision for the organisation and the legal and financial duties and responsibilities of the Board. The manner of their appointment is set out in the Constitution to ensure Directors hold the appropriate range of skills, knowledge and experience necessary to govern.

The Board represents and is accountable for the organisation's operations to members, funding bodies, sponsors and the community.

The Board's responsibilities include, but are not limited to:

- Providing input into and approving the strategic plan, budgets, programs and policies.
- Assessing performance against strategies to monitor both the performance of management, as well as the continuing suitability of strategies.
- Approving and monitoring significant capital expenditure and significant commitments under agreed programs.
- Ensuring the company operates with an appropriate corporate governance structure.
- Ensuring the company operates in accordance with the Constitution.
- Safeguarding the assets of the Company and Trust.

Directors are required to provide information about their business and other interests to the Board at the time of their appointment and this information is updated at each Board meeting as required. A policy document provides guidelines on what constitutes a conflict of interest.

Where appropriate, Directors may seek, with the approval of the Chairman, independent professional advice on matters arising during their Board and committee duties.

## Directors of FIA 2017

The Board of Directors is comprised of members elected from each of the six states and the ACT. Organisational Members receive specific representation from the Organisational Member Director. The Board may also choose to appoint Directors to support specific needs of the organisation.

FIA acknowledges the hard work and dedication of those members who served as FIA Directors in 2017.



### Chair 2017

Nigel Harris FFIA CFRE

**Occupation:** Chief Executive Officer, Mater Foundation

**Experience:** Appointed Director February 2012; FIA Chair 2006-2010, 2016-present; Deputy Chair 2014-2015; Ethics Committee 2008-2009; Professional Development Committee 2009-present; Nominations Committee 2005-present; Finance & Audit Committee 2016-present; Sector Sustainability Taskforce 2016-2017.



### Deputy Chair

Zoe Karkas FFIA

**Occupation:** Principal, Why Not This & Associates

**Experience:** Appointed Director February 2016; FIA VIC 2011-present; Appointed Treasurer February 2014; Conference Committee 2014; Awards Judge 2015; Nominations Committee 2015-present.



### Treasurer

Paul Flynn MFIA

**Occupation:** Chief Executive Officer, The Hospital Research Foundation

**Experience:** Appointed Director April 2016; Chair Finance & Audit Committee 2016-present; FIA SA/NT 2016-present.



### Director

(New South Wales)

Andrew Giles FFIA

#### Occupation:

Chief Executive Officer, Garvan Research Foundation

**Experience:** Appointed Director March 2016; NSW State Chair 2014-2015; Conference Speaker 2014, 2015, 2016; Awards Judge 2015; Sustainability Taskforce 2016; FIA Board Taskforce 2016-2017.



### Director

(Queensland)

Benjamin Cox FFIA

#### Occupation:

Fundraising and Communications Manager, Brisbane Legacy

**Experience:** Appointed Director February 2012; Chair FIA QLD 2014-2015; Awards Judge 2014-2015; FIA QLD 2012-2013, 2015-present. FIA Code Authority 2017-present.



### Director (South Australia)

Elizabeth Davis EMFIA CFRE

#### Occupation:

Principal, emdf Consultancy

#### Experience:

Appointed Director February 2014; FIA SA/NT 2012-present; Chair FIA SA/NT 2014-2015; SA Presenter 2016; Awards Judge 2013.

**Director (Tasmania)**

Sophie Davidson MFIA

**Occupation:**

Senior Manager Philanthropy & Development, WWF Australia

**Experience:** Appointed Director February 2014; FIA TAS 2013-2017. Resigned 31 July 2017.

**Director (Western Australia)**

Allan Godfrey FFIA

**Occupation:**

General Manager – Marketing, Royal Life Saving Society Australia

**Experience:**

Appointed Director February 2013; Awards Judge 2015-2016; FIA WA 2012-present; WA Presenter 2014; Awards Committee Chair 2017.

**Organisational Member Director**

Jennifer Doubell FFIA CFRE

**Occupation:** Executive Director, Peter MacCallum Cancer Foundation

**Experience:**

Appointed Director February 2015; Awards Judge 2014; NSW Presenter 2013; Conference Speaker 2015, 2016; Sector Sustainability Taskforce 2016-2017. FIA Code Authority 2017-present.

**Board Appointed Director**

James Garland FFIA CFRE

**Occupation:**

Director, Garland Blanchard

**Experience:** Appointed Director March 2016; Conference Committee 2014; VIC Presenter 2014; Conference Committee 2014, 2015; Conference Speaker 2015, 2016.

**Board Appointed Director**

Marcus Blease FFIA

**Occupation:** Co-Founder – Director, Donor Republic

**Experience:** Appointed Director February 2015; Awards Judge 2014, 2015; SA Presenter 2015-2016; Sector Sustainability Taskforce 2016.

**Board Appointed Director**

Trudi Mitchell MFIA

**Occupation:** Deputy National Director, Australia for UNHCR

**Experience:** Appointed Director February 2015; Awards Judge 2014-2016, Sector Sustainability Taskforce 2016-2017.

**Board Appointed Director**

Warwick Hay MFIA

**Occupation:** Managing Director, IVE Group

**Occupation:** Appointed Director February 2017.



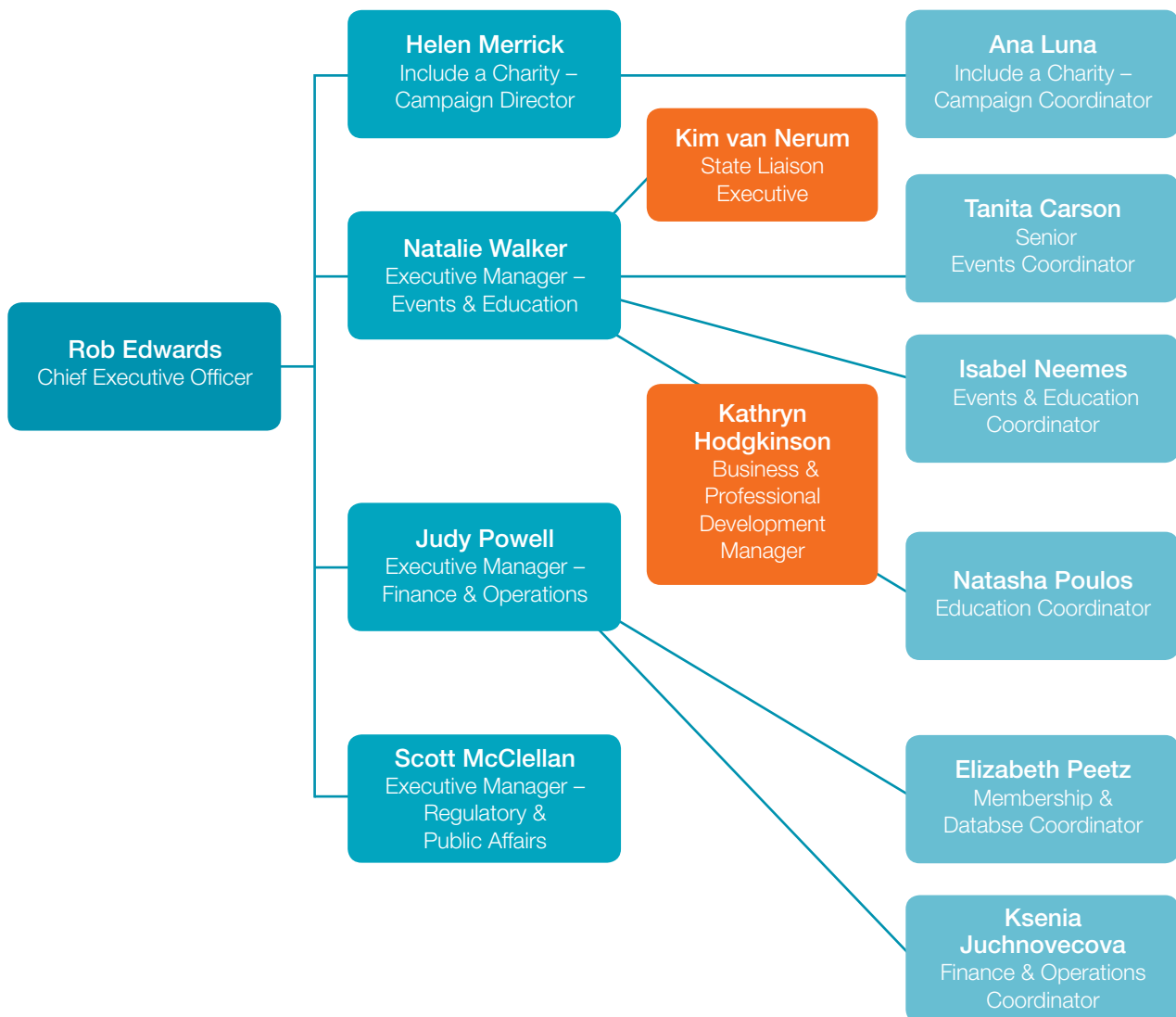
# FIA Secretariat

The day-to-day operations of the Institute are managed by a dedicated team of staff.

## 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

## Meet the Team



# FIA Foundation



The FIA Foundation exists primarily to advance and develop the training and education of professional fundraisers. It provides access to professional fundraising resources, facilitates industry research, aides in the development of certification programs for fundraisers, and promotes the contributions of professional fundraisers to our community.

The FIA Foundation was created in 1993 and the trustees are the Chair, Deputy Chair and Secretary of the FIA Board of Directors. Operating as a DGR status fund, the trustees of the Foundation have a clear vision to:

- advance and develop training and education opportunities for fundraisers (including scholarships);
- develop the Library Resource Centre; and
- promote research into the fundraising industry.

The FIA Foundation is about fundraisers supporting their own, and giving back to their Institute which in turn sponsors their professional development.

## ARTHUR VENN SCHOLARSHIP

The Arthur Venn Fundraising Leadership Scholarship pays tribute to one of the founders and teachers of fundraising in Australia.

A volunteer group of experienced FIA members, The Moby's, pay tribute to Arthur Venn, a founding father of the fundraising profession in Australia, through the scholarship which supports the next generation of Australian fundraising leaders.

Arthur Venn sadly passed away on 18th January 2013. Arthur was a mentor to many fundraisers, a teacher who sought to build pride in those who took up fundraising as a profession. FIA recognises his contribution to fundraising in Australia with the Arthur Venn Fundraiser of the Year Award, which is presented at the FIA Conference.



In 2016, The Moby's introduced the John Allen Scholarship, awarded to scholars from Victoria. This year, the scholarships funded course fees for seven FIA members to attend FIA's Fundraising Change Leadership course. These scholarships promote the importance of fundraising leadership and established an ongoing mentoring process for all Arthur Venn Fundraising Leadership Scholars.

### 2017 Arthur Venn Scholarship recipients:

- Christine Anderson MFIA CFRE, Head of Fundraising & Marketing, Variety – The Children's Charity of Queensland
- Ross Verschoor AMFIA, Development & Communications Manager, Flinders Foundation
- Jessica Bezerra EMFIA, Stewardship Coordinator, Curtin University
- Angela Gordon MFIA, Fundraising Manager, Trees for Life
- Cara Morrison MFIA, Marketing Manager – Loyalty, Cancer Council NSW

### 2017 John Allen Scholarship Recipients:

- Veronica Gargano MFIA, Head of Direct Marketing, Austin Health
- Sharon Elliott MFIA, National Manager, Ethiopiaaid Australia Foundation

## Celebrating Distinguished Service

FIA promotes excellence in fundraising by recognising the achievements of our members in our drive to be the best we can as fundraising professionals. The contribution of these members to the fundraising profession, and the community at large, is to be admired.

Our Constitution celebrates the member journey by acknowledging the distinguished service of FIA members by the election of members to the status of Fellow, Emeritus or Honorary Member.

### Fellows as at 31 December 2017

Election as a fellow is a professional honour that is awarded following intense peer review and careful consideration by the FIA Board of Directors. Fellows are nominated by their peers for their contribution to the profession. Fellows are elected by members at the Annual General Meeting.

Alicia Watson FFIA CFRE  
Allan Godfrey FFIA  
Andrew Giles FFIA  
Andrew Markwell FFIA CFRE  
Anne Gribbin FFIA CFRE  
Barbara Ward FFIA  
Benjamin Cox FFIA  
Brian Holmes FFIA CFRE  
Chris Benaud FFIA CFRE  
Christine Roberts FFIA  
Clare MacAdam FFIA CFRE  
Craig Gravestine FFIA CFRE  
David Zerman FFIA  
Evelyn Mason FFIA  
Gail Breen FFIA  
Gavin Coopey FFIA  
Graham McKern FFIA CFRE  
Heiko Plange-Korndorfer FFIA CFRE  
Helen Smith FFIA  
Jackie Evans FFIA CFRE  
James Garland FFIA CFRE  
Jannine Jackson FFIA CFRE  
Jennifer Doubell FFIA CFRE  
Jeremy Maxwell FFIA CFRE  
Jim Weber FFIA (deceased)  
Jo Garner FFIA CFRE  
Judy Ford FFIA CFRE  
Karen Armstrong FFIA CFRE  
Kathy John FFIA  
Kerin Welford FFIA CFRE  
Leanne Angel FFIA CFRE

Leigh Cleave FFIA CFRE  
Leo Orland FFIA CFRE  
Lesley Ray FFIA CFRE  
Lindsay May FFIA CFRE  
Marcus Bleas FFIA  
Margaret Haydon FFIA  
Margaret Scott FFIA CFRE  
Mark Hindle FFIA CFRE  
Mark Quigley FFIA  
Martin Paul FFIA  
Maurice Henderson FFIA CFRE  
Meredith Dwyer FFIA CFRE  
Nick Jaffer FFIA  
Nigel Harris FFIA CFRE  
Peter Dalton FFIA CFRE  
Peter Burnett FFIA CFRE  
Regina Tucker FFIA  
Rhonda Robinson FFIA CFRE  
Rick Sillett FFIA  
Roewen Wishart FFIA CFRE  
Savas Zacharias FFIA  
Sharon Hillman FFIA  
Stephen Mally FFIA CFRE  
Tanya Hundloe FFIA CFRE  
Tracey Finlay FFIA CFRE  
Tracy McNamara FFIA  
Vicki Rasmussen FFIA CFRE  
Zoe Karkas FFIA  
Vicky Dodds FFIA  
Wendy Scaife FFIA

## Emeritus Members as at 31 December 2017

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This award is bestowed by the FIA Board of Directors on retired members in recognition of their esteemed membership. Emeritus members are announced at the Annual General Meeting.

Margaret Armstrong FFIA (Emeritus)	Graeme Bradshaw FFIA (Emeritus) CFRE
Lyn Buckley FFIA (Emeritus)	Kenneth Harrison FFIA (Emeritus)
Jennie Cameron MFIA (Emeritus)	Jenny Marchionni MFIA (Emeritus)
Peter Castleton FFIA (Emeritus)	Brian O'Keefe FFIA (Emeritus)
Diane Clark FFIA (Emeritus)	Dennis O'Reilly FFIA (Emeritus)
Ray Crompton MFIA (Emeritus)	David Rose FFIA (Emeritus)
Ron Ellis FFIA (Emeritus)	John Townend FFIA (Emeritus) CFRE
Ted Flack FFIA (Emeritus)	Michelle Trevorrow FFIA (Emeritus) CFRE
Peter Fletcher FFIA (Emeritus) CFRE	Rosemary Wilcox FFIA (Emeritus)
Paul Freeman FFIA (Emeritus)	Ann Wood FFIA (Emeritus)
Russell Harris FFIA (Emeritus)	Dee Taseff MFIA (Emeritus)

## Honorary Members as at 31 December 2017

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The FIA Board of Directors may from time to time elect individuals, not otherwise qualified for membership, to honorary membership. This honour is granted to those that have made a notable contribution to the fundraising profession in Australia.

William McGinly MFIA (Hon)	Mary Henderson MFIA (Hon)
Phillip Warner MFIA (Hon)	Paulette Maehara MFIA (Hon) CFRE
Sid Mallory MFIA (Hon)	Myles McGregor-Lowndes MFIA (Hon)
Douglas Dillon MFIA (Hon) CFRE	Ian Fraser MFIA (Hon)
Andrew Watt MFIA (Hon)	Michael Farrell MFIA (Hon)
Michelle Campbell MFIA (Hon)	Ann Thompson-Haas MFIA (Hon)



## Certified Fund Raising Executives (CFRE) as at 31 December 2017

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The CFRE designation is a personal and professional achievement that sets standards in philanthropy and is recognised world-wide. FIA encourages fundraisers to achieve and maintain this credential as a mark of their commitment to the fundraising profession.

"If what we do matters, I mean really matters, then we have to be more than good at our job. We need to strive for professional identity and all it entails - including credentialing." Nigel Harris FFIA CFRE, Chief Executive Officer, Mater Foundation. Many of FIA's members have chosen to expand their education and qualifications with the notable CFRE accreditation. FIA would like to acknowledge these individuals for their dedication to their non-profit careers.

Christine Anderson MFIA CFRE	Douglas Dillon MFIA (Hon) CFRE
Leanne Angel FFIA CFRE	Jennifer Doubell FFIA CFRE
Karen Armstrong FFIA CFRE	Kimberly Downes EMFIA CFRE
Paul Bailey MFIA CFRE	Meredith Dwyer FFIA CFRE
Kelly Barrington MFIA CFRE	Marla Edwards MFIA CFRE
Chris Benaud FFIA CFRE	Jackie Evans FFIA CFRE
Paul Benjamin MFIA CFRE	Peter Fletcher FFIA (Emeritus) CFRE
Graeme Bradshaw FFIA (Emeritus) CFRE	Judy Ford FFIA CFRE
Peter Burnett FFIA CFRE	Lorraine Fraser EMFIA CFRE
Leigh Cleave FFIA CFRE	James Garland FFIA CFRE
Bianca Crocker MFIA CFRE	Jo Garner FFIA CFRE
Kerry Cutting EMFIA CFRE	Craigie Gravestine FFIA CFRE
Peter Dalton FFIA CFRE	Anne Gribbin FFIA CFRE
Elizabeth Davis EMFIA CFRE	Kate Eddy MFIA CFRE

Nigel Harris FFIA CFRE  
Rebecca Hazell EMFIA CFRE  
Maurice Henderson FFIA FAHP; CFRE  
Mark Hindle FFIA FAHP; CFRE  
Brian Holmes FFIA CFRE  
Tanya Hundloe FFIA CFRE  
Jannine Jackson FFIA CFRE  
Earle Johnston MFIA CFRE  
Matthew Lang MFIA CFRE  
Clare MacAdam FFIA CFRE  
Paulette Maehara MFIA (Hon) CFRE  
Stephen Mally FFIA CFRE  
Andrew Markwell FFIA CFRE  
Jeremy Maxwell FFIA CFRE  
Lindsay May FFIA CFRE  
Karen McComiskey MFIA CFRE  
Heather McGinness MFIA (AFP) CFRE  
Graham McKern FFIA CFRE  
Lorraine Nothling EMFIA CFRE  
Leo Orland FFIA CFRE  
David Osborne EMFIA CFRE

Heiko Plange-Korndoerfer FFIA CFRE  
Cheryl Pultz EMFIA CFRE  
Vicki Rasmussen FFIA CFRE  
Lesley Ray FFIA CFRE  
Patricia Roath EMFIA CFRE  
Rhonda Robinson FFIA CFRE  
Charlotte Sangster EMFIA CFRE  
Margaret Scott FFIA CFRE  
Terri Sheahan EMFIA CFRE  
Kim Sutton MFIA CFRE  
Pamela Sutton-Legaud MFIA CFRE  
Sharyn Tidswell MFIA CFRE  
John Townend FFIA (Emeritus) CFRE  
Michelle Trevorrow FFIA (Emeritus) CFRE  
Sonya Tufnell MFIA CFRE  
Alicia Watson FFIA CFRE  
Kerin Welford FFIA CFRE  
Maree Whybourne MFIA CFRE  
Susanne Williamson EMFIA CFRE  
Roewen Wishart FFIA CFRE  
Randy Wood MFIA CFRE

## TO OUR VOLUNTEERS, SPONSORS AND CONTRIBUTORS TO THE SECTOR, THANK YOU.

FIA works with numerous individuals within the non-profit sector, many of whom donate their time to assist with our various professional development events and projects. Capacities where FIA volunteer members contribute include:

- Constitutional and Directors' Committees
- CEO Committees
- State and Territory Committees
- Include a Charity Advisory Committee
- Presenters and tutors at education and training events
- Awards Judges

The work of FIA would not be possible without the generous support of FIA's sponsors. Your support of FIA and specific event related sponsorship makes the ongoing delivery of services possible.

The FIA Board of Directors and staff would like to take this opportunity to thank each of you for your contribution, large or small, to fundraising and to the work of Fundraising Institute Australia.

## Thank you for your Bequest

FIA would like to acknowledge the extraordinary generosity of Jim Weber FFIA. Jim's kindness has enabled the FIA Foundation to support professional development and sector research for years to come.

# Constitutional and Directors' Committees

The FIA Board of Directors recognises the contribution of the members of the Constitutional and Directors Committees who assist the Board in ensuring a sustainable future for the Institute.

## CODE AUTHORITY

The Code Authority oversees member compliance with the FIA Code.

Ursula Stephens (Chair)

Sue-Anne Wallace

Jennifer Doubell FFIA CFRE

Ben Cox FFIA

Bill Dee

Roewen Wishart FFIA CFRE

Bruce Cotton MFIA

## FELLOWS NOMINATIONS COMMITTEE

The Board established the Fellows Nominations Committee to develop a procedure for the evaluation of nominations and the decision whether or not to recommend nominees for designation as a Fellow by election at the Annual General Meeting.

Vicki Rasmussen FFIA CFRE (Chair)

Sharon Hillman FFIA

Tracy McNamara FFIA

Roewen Wishart FFIA CFRE

Bruno Yvanovich (resigned 21.9.2017)

## FINANCE AND AUDIT COMMITTEE

The Finance and Audit Committee has been established to assist the Board in the discharge of the Boards responsibilities for financial reporting, maintaining a system of internal control, risk management and compliance.

Paul Flynn MFIA (Chair)

Brian Holmes FFIA CFRE

Joe Shannon

Nigel Harris FFIA CFRE

## NOMINATIONS COMMITTEE

The Nominations Committee leads the process for nominations for appointment and re-appointment of Chair Elect, the Board Appointed Directors, the Director from Organisational Members, nominations to Ethics Committee and other appointments as required by the Board.

Nigel Harris FFIA CFRE (Chair)

Zoe Karkas FFIA

Leo Orland FFIA CFRE

Roewen Wishart FFIA CFRE

# CEO Committees

The FIA Secretariat is supported by dedicated members of the CEO Committees. Working tirelessly to provide members with quality professional development opportunities and to raise the standard of professional fundraising.

## CONFERENCE 2017 PROGRAM COMMITTEE



FIA's 40th Conference was very successful by any measure with the number of delegates coming close to those in 2016. The exhibition was a hive of activity with 46 organisations exhibiting. The Gala Awards Dinner was a great night for all, with 390 people celebrating the profession.

## THANKS TO OUR 2017 CONFERENCE PROGRAM COMMITTEE:

Karen Armstrong FFIA CFRE (Chair)	Lisa Allan MFIA
Stephen Ellis	Leanne Angel FFIA CFRE
Leo Orland FFIA CFRE	Jan Chisholm MFIA
Alexandra Struthers MFIA	Sommer Davies
Gavin Coopey FFIA	Vicki Rasmussen FFIA CFRE
Andrew Sabatino MFIA	Kim Sutton MFIA CFRE
Lesley Ray FFIA CFRE	Anna Robinson
Jonathan Storey MFIA	



## CONFERENCE 2018 PROGRAM COMMITTEE

The Committee behind the program for FIA's 41st Conference has done an incredible job of creating a program to meet a wide variety of members' needs. There is still much to be done before members from around Australia and the Asia Pacific region arrive at the International Convention Centre in Sydney for the conference from 7 – 9 March 2018.

## WITH ONGOING THANKS TO OUR 2018 CONFERENCE PROGRAM COMMITTEE:

Marcus Blease FFIA (Chair)	Alexandra Struthers MFIA
Lisa Allan MFIA	Fiona McPhee
Nicola Norris MFIA	Alex Green CFRE
Kristofer Rogers MFIA	Ben Holgate MFIA
Andrew Sabatino MFIA	Kim Sutton MFIA CFRE
Warrick Saunders MFIA	Ross Anderson MFIA
Leanne Angel FFIA CFRE	Kirsty Graham MFIA
Stephen Mally FFIA CFRE	Ruthann Richardson MFIA



## PROFESSIONAL DEVELOPMENT COMMITTEE 2017

The Professional Development Committee provides strategic advice and direction in relation to the content and structure of professional development programs offered by FIA. The Committee is made up of experts in fundraising and we are grateful for the advice and support received from the Committee.

James Garland FFIA CFRE  
Margaret Scott FFIA CFRE  
Leigh Cleave FFIA CFRE

Lesley Ray FFIA CFRE  
Vicki Rasmussen FFIA CFRE  
Michelle Varcoe MFIA

## MEDIA ADVISORY GROUP 2017

The Media Advisory Group assist FIA by enabling us to establish protocols and positioning statements for media comment and helping to present a united voice for the sector. Thank you to those organisations who participate in the Media Advisory Group.

Amnesty International  
Australian Red Cross  
Cerebral Palsy Alliance  
Fred Hollows Foundation  
Starlight Children's Foundation  
WWF-Australia

Appco Group Australia  
Cancer Council NSW  
Cornucopia Fundraising  
Heart Foundation  
World Vision

## IAC ADVISORY COMMITTEE 2017

The Include a Charity Advisory Committee aims to promote philanthropy in Australia by encouraging the creation of charitable bequests. Thank you to those who volunteer their time so generously.

Roewen Wishart FFIA CFRE (Chair)  
Sharne Nicholls (National Breast Cancer Foundation)  
Christopher Baker AMFIA  
Rebecca Passlow (Bush Heritage Australia)  
Emma Wills (Cancer Council QLD)  
Suzanne Brown MFIA (The Salvation Army)  
Maisa Paiva MFIA (Cerebral Palsy Alliance)  
Jakki Travers (The Smith Family)  
Paul Evans (Makinson D'Apice Lawyers)  
Carol O'Carroll MFIA (Garvan Research Foundation)  
Karen Wall (Cancer Council VIC)

## AWARDS COMMITTEE 2017

The Awards Committee was established to help FIA recognise the outstanding initiatives and innovative efforts of fundraisers, volunteers and organisations in the sector. Thank you to the volunteers whose knowledge and expertise are an invaluable resource.

Allan Godfrey (Chair) FFIA  
Benjamin Cox FFIA  
Sharon Hillman FFIA  
Gilbert Lorquet MFIA



## SECTOR SUSTAINABILITY TASKFORCE 2017

The Sector Sustainability Taskforce was tasked with reviewing the need for stronger mechanisms in fundraising self-regulation. FIA wishes to thank the members of the Taskforce, whose tireless efforts have made a huge difference within the fundraising sector.

Nigel Harris FFIA CFRE

Jennifer Doubell FFIA CFRE

Kerren Morris MFIA

Ben Holgate MFIA

Andrew Thomas

Jim Hungerford MFIA

Marcus Blease FFIA

Trudi Mitchell MFIA

Alex Green CFRE

Nicola Stewart MFIA

Yvette Peterson MFIA

## FIA STATE/TERRITORY COMMITTEES 2017

FIA's quality and strength comes from our State and Territory Committee volunteers. These Committees exist to deliver professional development and networking programs within their state, to provide FIA members with the skills and competencies needed to be effective fundraising professionals. We would like to acknowledge the work done by all at the state/territory level, who have provided yet another outstanding year of service to the fundraising community.

### Australian Capital Territory

Trevor Capps (Chair)  
Judy Ford FFIA CFRE  
Ann Ronning MFIA  
Rose Stellino

Anastasia Davy MFIA  
Kellie O'Sullivan MFIA  
Helen Falla MFIA

### New South Wales

Andrew Giles FFIA (Director)  
Stephen Mally FFIA CFRE (Chair)  
Julie-Anne Macintyre MFIA  
Karen Firestone MFIA  
Tessa Irwin AMFIA  
Holly Dare MFIA

Len Russell MFIA  
Jackie Evans FFIA CFRE  
Lisa Miller MFIA  
Charlotte Sangster EMFIA CFRE  
Rachael Lance MFIA  
Christine Roberts FFIA

### Queensland

Ben Cox FFIA (Director)  
Meredith Dwyer FFIA CFRE (Chair)  
Christine Anderson MFIA CFRE  
Sara Mansfield MFIA  
Jock Beveridge MFIA  
Harriet Carter

Katherine Ash MFIA  
Margaret Scott FFIA CFRE  
Vicki James MFIA  
Brooke Rose MFIA  
Kim Sutton MFIA CFRE  
Alexandra Struthers MFIA

### South Australia and Northern Territory

Elizabeth Davis EMFIA CFRE (Director)  
Paul Flynn MFIA (Director)  
Darin Johnson MFIA (Chair)  
Ian Cox  
Rebecca Miller MFIA  
Ross Curtis MFIA

Kay Milton  
Kellie Bartlam MFIA  
Sarah Lenigas MFIA  
Paul Morton MFIA  
Andrew Sabatino MFIA  
Sam Tolley

### Tasmania

Michelle Folder MFIA (Chair)  
Cath Adams MFIA  
Mark Foyle MFIA

Sarah Moss MFIA  
Rebecca Cuthill MFIA  
Sophie Davidson MFIA

### Victoria

Zoe Karkas FFIA (Director)  
Gail Breen FFIA (Chair)  
Kate Eddy MFIA CFRE  
Steve Francis  
Veronica Gargano MFIA

Helen Smith FFIA  
Nichole Alfreds EMFIA  
Pamela Sutton-Legaud MFIA CFRE  
Jim Weber FFIA (deceased)

### Western Australia

Allan Godfrey FFIA (Director)  
Anne Smith EMFIA (Chair)  
Bec Stott MFIA  
Lucinda Ardagh  
Ashlie Marshall EMFIA  
Vicki Rasmussen FFIA CFRE

Hazel Grunwaldt MFIA  
Laura Kazmirowicz MFIA  
Jessica Bezerra EMFIA  
Michael Van Oudtshoorn  
Simone Yule  
Tanya Hundloe FFIA CFRE

# Include a Charity



2017 was a year of consolidation for the Include a Charity campaign. Our new three-year strategy was launched with the overall aim to increase gifts in Wills revenue in Australia to \$1 billion by 2025. We invested in the development of a new legal engagement campaign, a new website, undertook a review of our digital activities and are placed for growth in this area in the next year.

Our key objectives this year included:

Objective	Result
To develop behavioural economics testing to inform our ongoing activities	<ul style="list-style-type: none"> <li>A series of workshops were undertaken in the last quarter of 2017 with supporter charities to define the testing that will be undertaken in 2018</li> </ul>
Influence political, professional and partners to achieve our goals	<ul style="list-style-type: none"> <li>Our Campaign Director, Helen Merrick, joined the Prime Ministers Business Community Partnership working group to help guide the current research being undertaken in gifts and Wills</li> <li>We undertook research to develop our legal engagement campaign which will launch in 2018</li> <li>We continued to work with influencers to assist the campaign reach its goals. Specific thanks go to Perpetual, Barker Henley, Makinson d'Apice, More Strategic, Initiative Media and Digital Ninjas for their campaign support</li> </ul>
Continually improve knowledge and practices in the sector	<ul style="list-style-type: none"> <li>We held 9 special interest groups across the country</li> <li>We also held five training sessions and 6 webinars for our supporters</li> <li>We released our updated Legal Engagement Toolkit</li> </ul>
Increase NFP campaign support and activation, especially A/B tier members	<ul style="list-style-type: none"> <li>62% of supporters engaged in Include a Charity Week, which is an increase from 2016</li> <li>Our A/B tier membership grew by 5 organisations</li> </ul>
Increase campaign impact through financial growth, campaign supporters and partners	<ul style="list-style-type: none"> <li>We increased membership revenue by \$15,000, however our membership decreased to 97 members by the end of 2017. We have seen an increase in larger organisations joining the campaign</li> </ul>

### Include a Charity Week 2017

Every September the campaign uses one single week to concentrate its activities to ensure maximum exposure. Include a Charity Week is positioned to align with international legacy weeks.

This year Include a Charity Week was held from 11 -17 September. It featured a visit from respected academic and charitable financial planning expert Dr. Russell James from Texas Tech University. Dr. James facilitated a complete review of his research and how research findings can be turned into practical applications for gifts in Wills marketing.

Some key outcomes of Include a Charity Week 2017 include:

- 260 people attended Include a Charity Week events across Australia
- More than 142,000 people interacted with the campaign throughout a variety of different channels
- 95,281 people were reached on Facebook and 98 new page likes
- Our digital campaign video received 76,647 views on YouTube
- 69 media pieces were made available across print, radio and online in the lead up to and during the campaign
- \$259,098 in advertising media value was delivered in September alone

### Thank you to our 2017 Advisory Council Members:

Roewen Wishart FFIA CFRE (Chair)  
Alicia Madden  
Carol O'Carroll  
Christopher Baker MFIA  
Emma Wills  
Jakki Travers  
Karen Wall  
Maise Paiva MFIA  
Paul Evans  
Rebecca Passlow  
Sharne Nicholls

We would like to thank all the Include a Charity campaign supporters for their valuable contribution. By continuing to work together we believe we can continue to change beliefs and increase gifts in Wills funding for the whole sector.

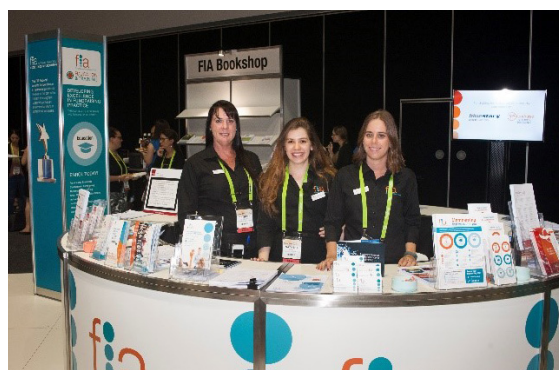


# Education & Training

The training provided by FIA is comprehensive, practical and interactive. We aim to ensure that our courses help attendees expand their skills, improve their results and drive their careers forward.

## FIA's 40th Conference – It's Chemistry

FIA's Conference is the peak event of its kind in the southern hemisphere. The conference program is designed to ensure that fundraisers are exposed to core and up to date fundraising techniques, disciplines, trends and ideas. Thank you to our speakers who generously volunteer their time to provide this opportunity. We also thank our sponsors and exhibitors whose support is invaluable and ensures that the conference remains an affordable training opportunity.



### 2017 CONFERENCE SPEAKERS

Mide Akerewusi  
Janie Alcock MFIA  
Jim Anderson CFRE  
Leanne Angel FFIA CFRE  
Alice Anwar  
Dr Christopher Baker MFIA  
Grant Barnes  
Kate Barnett  
Jeremy Bennett  
Tracy Bevan  
Katrina Birch  
Marcus Blease FFIA  
Louise Bonomi  
Roz Brown  
Harriett Carter  
Jan Chisholm MFIA  
Gavin Coopey FFIA  
Justine Curtis MFIA  
Peter Dalton FFIA CFRE  
Sharon Dann  
Jennifer Doubell FFIA CFRE  
Meredith Dwyer FFIA CFRE  
Kate Eddy MFIA CFRE  
Rob Edwards  
Luke Edwards MFIA  
Stephen Ellis  
Nathan Elvery  
Derrick Feldmann  
Alice Ferris  
John Fitzgerald  
Linda Garnett

Dan Geaves MFIA  
Andrew Giles FFIA  
Jonathon Grapsas MFIA  
Craig Gravestine FFIA CFRE  
Nigel Harris FFIA CFRE  
Katie Hart  
Audrey Hii MFIA  
Glen Hill  
Tanya Hundloe FFIA CFRE  
Erin Jones MFIA  
Richelle King MFIA  
Ben Littlejohn MFIA  
David Locke  
Simon Lockyer  
Daniel Madhaven  
Claire Mallinson  
Heather McGinness MFIA (AFP) CFRE  
Kaz McGrath  
Bruce McKaskill  
Jacinta McLennan  
Rachael McLennan  
Fiona McPhee  
Lisa Miller MFIA  
Kerren Morris MFIA  
Peter Muffet  
Shanelle Newton Clapham  
Joel Nicholson MFIA  
Nicola Norris MFIA  
Dr John O'Donnell  
Leo Orland FFIA CFRE

Martin Paul FFIA  
Ligia Pena CFRE  
Cheryl Pultz EMFIA CFRE  
Howard Ralley  
Vicki Rasmussen FFIA CFRE  
Lesley Ray FFIA CFRE  
Paul Reis MFIA  
Kristofer Rogers MFIA  
Ashley Rose MFIA  
Andrew Sabatino MFIA  
Joe Saxton  
Professor Wendy Scaife FFIA  
Karen Seivewright  
Amber Sprunt  
Jonathan Storey MFIA  
Alexandra Struthers MFIA  
Kim Sutton MFIA CFRE  
Sally Trainor  
Jakki Travers  
Rhiannon Tuntevski  
Kate Van de Peer MFIA  
Owen Wareham  
Jim Weber FFIA (deceased)  
Michael Whitney  
Ruth Wicks  
Ann-Marie Willgoose MFIA  
Emma Wills  
Roewen Wishart FFIA CFRE  
Tim Wood  
Chris Wootton

## CONFERENCE SUPPORTERS

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STORYTELLING FOR SOCIAL IMPACT



## 2017 CONFERENCE EXHIBITORS

2grow fundraising  
 AAKonsult Pty Ltd  
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 Australian Charities and Not-for-profits  
 Commission (ACNC)  
 Australian Taxation Office (ATO)  
 Australian Paper  
 Beaumont People  
 Blackbaud Pacific  
 Bluestar  
 Bolt Solutions  
 Candida  
 Charidy  
 Cloud Industry Group Pty Ltd  
 Clouding Around  
 Communication Direct  
 Conexum  
 contactSPACE  
 Cornucopia Consultancy  
 CreditSoft Solutions  
 DonorDrive  
 eGentic Asia Pacific  
 everydayhero  
 Ezidebit  
 Fat Beehive  
 Flo2Cash Pty Ltd

FrontStream  
 Givergy  
 GoFundraise  
 Helping Hand Group  
 HomeMade Digital  
 Inspired Adventures  
 Lighthouse Group Pty Ltd  
 Marketsoft-Lemontree  
 Marketsoft  
 Momentary  
 Morphate - Technology for Good  
 NGO Recruitment  
 OneContact  
 Pareto Fundraising  
 Precision Mail  
 Pronto Direct  
 Raisley  
 Senses Data / Senses Direct  
 Strategic Grants  
 thankQ Solutions P/L  
 The Prospect Shop  
 Vega.Works limited  
 Windsor Recruitment  
 Xponential  
 Precision Mail



# FIA Professional Development

As the leading provider of fundraising education and training in Australia, FIA strongly believes in the importance of ongoing professional development to enhance career potential and contribution to the effectiveness of their organisation.

Designed by fundraisers for fundraisers, FIA's comprehensive, practical and interactive education and training program provides an opportunity for participants to expand their skills, consolidate their knowledge, hone their leadership and management abilities, improve their results and drive their career forward.

In March, FIA proudly announced the launch of the new Executive Education program – *Governance Foundations for Not-for-Profit Directors*. Jointly presented by AICD and FIA facilitators, this unique initiative focuses solely on educating the executives and board members of not-for-profit organisations. This two-day course emphasises governance, leadership, compliance issues, change management and strategic fundraising; in short, everything needed to be more effective at the boardroom table and better serve the organisation and its mission.

FIA's Core Education suite now includes the online *Fundraising Essentials* course as an option. *Fundraising Essentials* is the '101' of fundraising - **a big picture overview** with practical tools to help get you started.

The online *Certificate* and *Diploma in Fundraising* continue to attract enrolments across Australia, and several enquiries from overseas. FIA's first international student (from Indonesia), completed the *Certificate in Fundraising* during the first half of the year.

FIA introduced two new Skills-Specific courses for the year, which proved to be very successful. The **Digital Fundraising Course** equips participants with a range of strategies to improve digital activity and visibility to attract, convert and reattain online donors. The **Fundraising Strategic Plan Course** focuses on the key attributes of an effective fundraising plan and the process of developing a workable plan for implementation after the course.

Other Skills-Specific courses for the year included *Copywriting for Fundraisers*, *Data Analytics for Empowered Fundraising*, *Fundraising Change Leadership*, *Gifts in Wills Fundamentals*, *Gifts in Wills Masterclass* and *Major Gifts Masterclass – Acceleration*.

FIA's fundraising and education program is very comprehensive, with something for all professional fundraisers, be they entry-level staff, middle managers, senior executives or board members.



## LEARNING PATHWAY

No matter where you are in your fundraising career, FIA has a course that can help you formalise your training, develop your skills and achieve your goals.





## WEBINAR SERIES

The FIA monthly webinar series provides members with an easy way to keep up to date on key fundraising education, and is free for members.

Our thanks to Gofundraise and their team for supporting the 2017 Webinar Series.

We appreciate all the presenters for giving us their time and effort and for the passion they put into preparing and sharing their webinars.

We would also like to acknowledge Stephen Mally for his valuable time in planning the series, coordinating the speakers and for his role as MC throughout the year.

This year's webinars topics have included:

### **2017 FIA Conference Webinar: Organisational Evolution: Managing Change when Humans are Involved**

**Presented by:** Alice Ferris CFRE ACFRE, Partner, GoalBusters LLC - FIA Conference 2017 keynote speaker

### **Including Digital Techniques to Grow a New Bequest Program**

**Presented by:** Laura Henschke MFIA, Bequest Manager, House with No Steps

### **How data cleansing and suppression file screening services can help save your charity valuable funds and protect your brand**

**Presented by:** Glenn Harrison, Managing Director, Conexum

### **DIY Fundraising Insights**

**Presented by:** Henry Gresson, Operations and Special Projects Director, GoFundraise and Anthea Cohen, Marketing & Communications Director, GoFundraise.

### **FIA Awards 2018: How to Write an Award-Winning Submission**

**Presented by:** Allan Godfrey FFIA, General Manager, Royal Life Saving Society WA, Ashlie Marshall EMFIA, Donor Development Coordinator, VisAbility Guide Dogs WA, Vicki Rasmussen FFIA CFRE, Executive Director, Charlies Foundation for Research

### **Innovations in Outcomes Measurement**

**Presented by:** Greg Simmons, Outcomes Business Manager, Blackbaud Pacific

### **Building a Donor-Centric Supporter Services Operation**

**Presented by:** Daraus Mirza, Director, Advancement Services and Operations, Deakin University and Sue Birch, Director, Advancement Services, The University of Queensland

### **Getting to Yes: Preparing and Asking for Major Gifts**

**Presented by:** Nick Jaffer FFIA, President & CEO (Asia Pacific), Global Philanthropic

### **Donor Relations Strategies That Every Fundraiser Can Do**

**Presented by:** Lucy Moore, Donor Relations Manager, UQ Advancement - The University of Queensland

## EDUCATION VENUE PARTNERS

Throughout the year our venue partners are vital to the success of FIA's Education and Professional Development Program. We would like to extend our thanks and gratitude for your generous contribution to the sector and for your commitment to making the delivery of our courses possible.

### Our heartfelt thanks to:

Australian Red Cross  
Beaumont Consulting  
Deaf Children Australia  
Flinders Foundation  
Guide Dogs SA/NT  
Heart Foundation Tasmania  
Legacy  
Macquarie University  
National Australia Bank  
QIMR Berghofer Medical Research Institute  
visAbility  
Westpac Banking Corporation

## FIA CORE EDUCATION

### Fundraising Essential

Fundraising Essentials is the '101' of fundraising - a big picture overview complete with practical tools. This course has been developed by education specialists along with senior fundraising professionals, to be delivered by experienced tutors who are currently working in the fundraising sector.

This year the Fundraising Essentials course was also added to FIA's suite of Online - Core Education Courses. We would like to thank Richard Pester for his expertise in developing the online course and all our tutors who helped to make it possible.

### Thank you to our 2017 tutors:

Frances Cinelli EMFIA	Stephen Mally FFIA CFRE
Bianca Crocker MFIA CFRE	Heiko Plange-Korndorfer FFIA CFRE
Daniel Bernstein MFIA	Andrew Sabatino MFIA CFRE
Melita Griffin MFIA	

### The Fish Community Solutions Scholarship

The Fish Community Solutions Scholarship was offered again in 2017 for the Fundraising Essentials course. Applicants must have had less than five years professional fundraising experience, and be from charities with a turnover of less than \$500,000 per year.

This year's scholarship was awarded to Rachael Zaltron, Backpacks for SA Kids.

Founded by Rachael herself in 2013, this small charity provides clothes and personal supplies to children placed in emergency foster care, kinship care or domestic violence.

### Certificate in Fundraising

The Certificate in Fundraising is best practice fundraising training for new fundraisers and those wishing to formalise or expand their existing skills. Every aspect of fundraising is covered, giving students a comprehensive view of the environment in which fundraisers operate and compete for funds, as well as the practical knowledge to generate substantial revenue.

Our tutors are all passionate fundraisers who bring with them years of experience, skills and knowledge. They create a relaxed open learning environment, where participants exchange ideas, information and learn from their peers. Their use of real-life scenarios and their enthusiasm for fundraising and learning makes each session highly valuable.

**Thank you to our 2017 tutors:**

Daniel Bernstein MFIA  
Marcus Blease FFIA  
France Cinelli EMFIA  
Bianca Crocker MFIA  
Tracey Finlay MFIA CFRE

Maisa Paiva MFIA  
Heiko Plange-Korndorfer FFIA CFRE  
Christiana Stergiou MFIA  
Bruno Yvanovich FFIA

**FIA CERTIFICATE IN FUNDRAISING SCHOLARSHIP**

The FIA Foundation over the years has awarded a number of scholarships to dynamic and deserving recipients who have taken the FIA Certificate in Fundraising course and have expanded their fundraising knowledge and expertise.

The 2017 scholarship recipients were:

Debra Almeida  
Jolene Molloy MFIA  
Killian Feehan

## Graduating Students Class of 2017

---

FIA is proud to acknowledge the achievement of the following graduates of the Certificate in Fundraising for 2017:

Debra Almeida  
Jackie Gent MFIA  
Adrienne Hui  
Tracie Junghans  
Miyuki Kudo  
Rosita Sunna AMFIA  
Jaimi Bailey  
Sebastian Behrens  
Daniella Bouari  
Andrea Claypoole  
Rodney Dibley MFIA  
Lila Elias  
Joseph Gavljak  
Jisha Kalam  
Aleksandra Miranda  
Reni Kumar  
Tim Sadler MFIA  
Tanja Voss  
Helen Carter MFIA

Steve Cranney  
Margie Hill  
Basem Kerbage AMFIA  
Rebekah Kober  
Suzanne McDonnell  
Jolene Molloy MFIA  
Tonya Peters  
Daniel Woodrow AMFIA  
Bree Johnson  
Natassja Serradura  
Bronwyn McGhee  
Naomi Schofield MFIA  
Georgia Gunther  
Rebekah King MFIA  
Chloe Ellis  
Natalie Guardala MFIA  
Mary Sayed  
Mary Judith Mahinay  
Emma-Laureen Huijs AMFIA

## FIA DIPLOMA IN FUNDRAISING

FIA's Diploma in Fundraising is open to Australian and international students by distance education and provides the skills and knowledge required to enhance the careers of professional fundraisers and those involved in the non-profit sector.

Students are guided through the course by highly regarded fundraising professionals. Both are expert tutors, Fellows of FIA (FFIA), hold the Certified Fund Raising Executive (CFRE) credential, are committed to the fundraising sector and dedicated to ongoing learning.

### **We would like to thank our Diploma tutors:**

Margaret Scott FFIA CFRE and  
Chris Benaud FFIA CFRE

## Graduating Students Class of 2017

---

FIA is proud to acknowledge the achievement of the following graduates of the Diploma in Fundraising for 2017:

Joanna Allwood MFIA	Pam Lake MFIA
Niamh Brady	Fiona Macaulay AMFIA
Jo Gleeson	George Meacham
Leanne Harrison MFIA	Cherie Nicholas MFIA

## FIA SKILLS-SPECIFIC (SHORT COURSES & MASTERCLASSES)

Whether you are new to the fundraising sector or want to expand your existing skills, FIA has several short courses and masterclasses covering a variety of Skills-Specific topics to help enhance your skillset and improve your confidence as a professional fundraiser.

We would like to thank our many tutors who authored, developed and delivered courses during 2017. And on behalf of all those who attend and participated in a course, FIA is grateful for your time, expertise, words of wisdom and experience.

## COPYWRITING FOR FUNDRAISERS

The Copywriting for Fundraisers workshop is a hands-on experience packed with tips and hints to help students become better writers at work. The course demonstrates the value of plain English, with a special focus on fundraising copy.

Thank you to our 2017 tutor: **Frank Chamberlin EMFIA**

## DATA ANALYTICS FOR EMPOWERED FUNDRAISING

This course teaches students how to build better donor loyalty with insights and evidence from data analytics, reporting and usage. Students will learn how to analyse donor behaviour, testing, reactivations, bonding and conversion programs and build an evidence based donor/prospect engagement plan to achieve best practice fundraising.

Thank you to our 2017 tutor: **Kathy John FFIA**

## DIGITAL FUNDRAISING

Digital is growing and online fundraising is a massive opportunity for charities to reach new supporters, engage donors and increase fundraising revenue. This one-day course will equip you with a range of strategies to maximise the potential of your online presence. It will help you to improve your digital activity and visibility to attract, convert and retain online donors.

Thank you to our 2017 tutor: **Luke Edwards MFIA**

*"Luke is an excellent presenter. Really great content. He pushes through in a timely fashion spending the right amount of time on each segment."*

Rebecca Swinton, Kids Under Cover

## FUNDRAISING CHANGE LEADERSHIP

Learn how to achieve dynamic growth in fundraising through 'fundraising change leadership'. Learn how, as a fundraising change leader, you can transform your fundraising program and team from good to great. This course teaches students the skills they need to succeed.

Thank you to our 2017 tutors: **Peter Dalton FFIA CFRE and Nigel Harris FFIA CFRE**

## FUNDRAISING STRATEGIC PLAN MASTERCLASS

This one-day course will teach you the key attributes of an effective fundraising plan and you'll work through the process in class to develop a workable plan for implementation after the course.

Thank you to our 2017 tutors: **Stephen Mally FFIA CFRE**

## GIFTS IN WILLS FUNDAMENTALS

This one-day course looks at how to develop an effective Gifts in Wills program in line with your organisations values and supporters. You will learn how the Gifts in Wills program fits into a total development strategy, what it means to be donor centric, why people leave a gift in their will, and discuss and review bequests research findings and case studies.

Thank you to our 2017 tutor: **Helen Merrick MFIA**

## GIFTS IN WILLS MASTERCLASS

This one-day interactive workshop and masterclass goes beyond the fundamentals of Gifts in Wills promotions, empowering attendees to go back to work and implement proven strategies immediately. This masterclass highlights that organisations of all sizes can benefit from a well-planned Gifts in Wills marketing strategy.

Thank you to our 2017 tutor: **Helen Merrick MFIA**

## MAJOR GIFTS MASTERCLASS – ACCELERATION

This one-day Masterclass will teach you how to plan and implement your major gifts strategy, focussing on prospect cultivation, development and solicitation strategy. You will explore the 10 steps to building the perfect meeting plan for a big gift ask, to help you to fast track your major gifts program.

Thank you to our 2017 tutor: **Brian Holmes FFIA CFRE**

## FIA EXECUTIVE EDUCATION

### GOVERNANCE FOUNDATIONS FOR NOT-FOR-PROFIT DIRECTORS

Launched in March, this course is delivered by two of Australia's leading professional associations. The Australian Institute of Company Directors (AICD) is Australia's **leading provider of executive-level training** and the FIA is Australia's foremost authority on fundraising best practice.

FIA Executive Education is aimed at:

- Directors and executives who want to make a real difference to the organisations they serve
- Directors of not-for-profit organisations
- Experienced Directors for whom the fundraising sector is new
- Directors who are seeking to transition into not-for-profit directorship
- Those who are considering accepting a directorship
- Executives who want to interact with their not-for-profit board more effectively

This program provides participants with:

- The essential skills to actively contribute to the success of the charity you serve
- A new perspective on not-for-profit board governance and what constitutes a high-performance board
- The ability to optimise the time you devote to your role as board director
- A great opportunity to connect with and learn from other senior directors with similar challenges and concerns

This intensive two-day program covers everything you need to know to be more effective at the boardroom table, and serve your organisation and its mission as effectively as possible.

Thank you to our 2017 speaker: **Nigel Harris FFIA CFRE**

## MENTOR PROGRAM

FIA's mentoring program is a major professional development benefit available to all members, providing an avenue for fundraisers to gain advice, offer support and improve their understanding of the not-for-profit sector.

The goal of the program is for the mentor to share their wealth of professional knowledge and life experiences with members new to fundraising, regardless of age, and provide valuable insights, advice and guidance in relation to the mentee's work and career.

The duration of the mentoring arrangement is left entirely up to the participants, but the timing is usually at least six months. It is a flexible arrangement which fits in with the busy schedules of both the mentor and mentee.

Guidelines are provided so that members know what to expect and evaluations are undertaken upon completion of the program. The program is free to all FIA members.

Currently the mentor program runs nationwide, with programs in NSW, QLD and VIC. Mentor Program Portfolio Holders in these states 2017 were:

**QLD** Jock Beveridge MFIA

**NSW** Julie-Anne Macintyre MFIA

**VIC** Gail Breen FFIA and Pamela Sutton-Legaud MFIA CFRE

**WA** Anne Smith EMFIA

We would like to thank Michelle Folder MFIA in Tasmania, Heiko Plange-Korndoefer FFIA CFRE and Darrin Johnson MFIA in South Australia and Northern Territory for helping mentees in their states to find suitable mentors when needed.

We would also like to thank ASI for sponsoring the 2017 Mentor Program in NSW and VIC.

# State and Territory Presenters and Sponsors

## New South Wales Presenters

Alex Malley  
Greg Simmons  
Dan Geaves MFIA  
Janne Ryan  
Claire Edwardes

Fraser Corfield  
Charlotte Sangster EMFIA CFRE  
Nicole Toby  
Will Carrick

## New South Wales sponsors:





## Victoria Presenters

Gary Conyers PhD  
Sharon Hillman FFIA  
Dan Mars MFIA  
Carolyn Schuwalow  
Pamela Sutton-Legvad MFIA CFRE  
Gavan Woinarski  
Paul Bailey MFIA CFRE  
Natalie Barnett

John Burns  
Alex Cross  
Karen McComiskey MFIA CFRE  
Georgie Ogilvie  
Jean Pierre Amour  
Genevieve Stone  
Erica Myers-Tattersall MFIA

## Victorian sponsors:



## Queensland Presenters

Jock Beveridge MFIA  
Harriet Carter  
Ben Cox FFIA  
Kirsty Graham MFIA  
Brooke Rose MFIA  
Meredith Dwyer FFIA CFRE  
Tina Hay  
Alice Evans  
Anthony Ryan  
Damian Topp EMFIA  
Rob Edwards  
Christine Anderson MFIA CFRE  
Steve Francis  
Matt Lang MFIA CFRE  
Shannon Laverack

Karen McGrath  
Professor Wendy Scaife FFIA  
Karen Shields  
Sonya Tufnell MFIA CFRE  
Juanita Wheeler  
Sinclair Taylor  
Dan Lalor MFIA  
Craig Gravestine FFIA CFRE  
Kim Sutton MFIA CFRE  
Jonathon Grapsas MFIA  
Josh Kidd  
Simone Owens  
Marie Balczun  
Will Kirsop MFIA  
Prue Pateras

## Queensland sponsors:



## Western Australia Presenters

Corinne Hawke	Bianca Crocker MFIA CFRE
Tanya Hundloe FFIA CFRE	Sarah English
Paula Cameron	Kate Fina
Linda Bolton	Jo Garner FFIA CFRE
Allan Godfrey FFIA	Jennifer Loveridge
Karen Kagi	Ashlie Marshall EMFIA
Diane McNamara	Professor Wendy Scaife FFIA
Vicki Rasmussen FFIA CFRE	Rikki Stewart MFIA
Ralph Bates	Deirdre Whiston
Marcus Blease FFIA	Simone Yule

## Western Australia sponsors:



## Australian Capital Territory Presenters

Kevin Kelly	Phil Butler
Matthew Whittaker	Scott McClellan
Peter Gordon	

## Australian Capital Territory sponsors:



## Tasmania Presenters

Rebecca Cuthill MFIA	Sophie Davidson MFIA
Rosalynne Rees	Cath Adams MFIA
Ed Benyon MFIA	Anthea Cohen MFIA

## South Australia Presenters

Peter Rutter  
Dave Simms  
Meghan Weekes  
Amel Bendeddouche  
Ian Cox  
Geoff Day OAM  
Meredith Dwyer FFIA CFRE  
Tracey Finlay FFIA CFRE  
Craig Gravestine FFIA CFRE

Samuel Johnson OAM  
Martin Paul FFIA  
Andrew Sabatino MFIA  
Elyse Sainty  
Stacey Thomas  
Paul Flynn MFIA

## South Australia sponsors:



SALMONSTUDIO



# Awards for Excellence in Fundraising 2017



The Awards for Excellence in Fundraising are a key component of FIA's commitment to champion best practice in fundraising. The Awards recognise the outstanding initiatives and innovative efforts of fundraisers, volunteers and organisations. They celebrate fundraisers' hard work and success across the year, provide an opportunity for acknowledgement by their peers, and promote the role of fundraising in improving our society.

## CATEGORY JUDGES

Drawn from around the country the following FIA members provided assistance in the first round of judging the 2017 Awards. FIA thanks these members for their contribution to celebrating fundraising success.

### Donor Acquisition

Yvette Petersen MFIA  
Andrew Sabatino MFIA

Alexandra Struthers MFIA

### Donor Renewal

Stephen Mally FFIA CFRE  
Sharon Hillman FFIA

Christine Roberts FFIA  
Zoe Karkas FFIA

### Major Gifts

Alex Green MFIA CFRE  
Vicki Rasmussen FFIA CFRE

Danielle Bayard  
Graige Gravestine FFIA CFRE

### Bequests/Gifts in Wills

Ross Anderson MFIA  
Jim Weber FFIA (deceased)

Roewen Wishart FFIA CFRE  
Vicky Dodds FFIA

### Capital Campaigns

Kim Downes EMFIA CFRE  
Sandy Fuller MFIA

Mark Quigley FFIA

### Special Events

Meredith Dwyer FFIA CFRE  
Gilbert Lorquet MFIA

Ben Cox FFIA  
Carrie Fletcher

## JUDGES

Organisational award finalists are then submitted to the National Judges to determine the overall winners in the FIA Awards for Excellence. State and Territory Committees judge the Young Fundraiser of the Year and Volunteer of the Year submissions from within their states and the winner from each state went on to national judging. FIA thanks the National Judges for their contribution to celebrating fundraising success.

Rob Edwards  
Nigel Harris FFIA CFRE

Allan Godfrey FFIA  
Leo Orland FFIA CFRE

# Awards for Excellence Winners 2017

## PRINCIPAL AWARDS

### Most Innovative Campaign

This award recognises the most outstanding display of innovation in communicating the purpose of the organisation, engaging supporters, or raising the profile, or enhancing the organisation's brand. Innovation may be displayed through strategy, implementation, creative and/or community engagement. Only organisational winners are eligible for this award.

#### 2017 winner:

Act for Peace –

*Act for Peace Ration Challenge*

### Most Outstanding Fundraising Project

This award recognises the most outstanding entry across all categories. Only organisational winners are eligible for this award.

#### 2017 winner:

University of Melbourne –

*Believe - the Campaign for the University of Melbourne*



## ORGANISATIONAL AWARDS

### Donor Acquisition

#### Over \$5 million revenue:

Act for Peace – *Act for Peace Ration Challenge*

#### Under \$5 million revenue:

ActionAid – *End FGM Acquisition Campaign*

### Donor Renewal

#### Over \$5 million revenue:

Children's Cancer Institute – *Charlie's Promise*

Peter MacCallum Cancer Foundation – *Direct mail: Alive and kicking during taxing times - Peter Mac's record Tax Appeal 2016*

#### Under \$5 million revenue:

VisAbility Guide Dogs WA – *Preparing a new generation of Guide Dogs: Creating a purposeful opportunity to engage and renew supporters*

## Major Gifts

### Over \$5 million revenue:

Perth Children's Hospital Foundation  
– *Emerging Leaders in Philanthropy*



### Bequests/Gifts in Wills

Sponsored by

**include *a charity***  
Help the work live on.

### Over \$5 million revenue:

Bush Heritage Australia – *Bush Legacy Circle & bequest reconfirmation campaign*

High commendation:

Cancer Council NSW – *Bequest Innovation*

Peter MacCallum Cancer Foundation – *Where there's a Will there's a way. Peter Mac's record year for Confirmed Bequestors – Triumph through Targeting Tenacity*

High commendation:

Assistance Dogs Australia – *Gifts in Wills Relationship and Growth Campaign*



## Capital Campaigns

### Over \$5 million revenue:

University of Melbourne – *Believe - the Campaign for the University of Melbourne*

## Special Events

### Over \$5 million revenue:

Act for Peace – *Act for Peace Ration Challenge*

High commendation:

Asylum Seeker Resource Centre – *ASRC Telethon on World Refugee Day*

### Under \$5 million revenue:

High commendation:

Give Where You Live Foundation – *Surf Coast Trek 2016*

## INDIVIDUAL AWARDS

### Arthur Venn Fundraiser of the Year

Sponsored by



**The winner of the 2017 Arthur Venn Fundraiser of the Year is:**

Jo Garner FFIA CFRE

### Young Fundraiser of the Year

Sponsored by



**The winner of the 2017 Young Fundraiser of the Year is:**

Charlotte Sangster EMFIA CFRE

High commendation:

Simone Yule MFIA



### Volunteer of the Year

Proudly sponsored by



**The 2017 Volunteer of the Year is:**

May Cameron, nominated by Cerebral Palsy Alliance

# Awards in Excellence Finalists 2017

## Donor Acquisition

### Over \$5 million revenue:

Act for Peace – *Act for Peace ration Challenge*  
Guide Dogs SA/NT – *2016 Acquisition direct Mail Pack*

### Under \$5 million revenue:

Assistance Dogs Australia – *Acquisition Swaps and Coops Campaign*  
ActionAid – *End FGM Acquisition Campaign*

## Donor Renewal

### Over \$5 million revenue:

Children's Cancer Institute – *Charlie's Promise*  
Guide Dogs SA/NT – *Guide Dogs SA/NT 2016 Tax Appeal*  
Peter MacCallum Cancer Foundation – *Direct Mail: Alice and kicking during taxing times*  
– *Peter Mac's record Tax Appeal 2016*

### Under \$5 million revenue:

VisAbility Guide Dogs WA – *Preparing a new generation of Guide Dogs: Creating a purposeful opportunity to engage and renew supporters*  
PetRescue – *The Adoptables*  
Royal Flying Doctor Service Victoria (RFDS VIC) – *Life-Saving Medical Equipment Replacement Appeal*  
Sydney Symphony Orchestra – *Your Orchestra Begins With You*

## Major Gifts

### Over \$5 million revenue

Australian Conservation Foundation (ACF) – *Nature's Champions*  
Oxfam – *The Oxfam Circle - Oxfam Australia's key supporter stewardship program*  
Perth Children's Hospital Foundation – *Emerging Leaders in Philanthropy*

### Under \$5 million revenue:

No finalists in 2017

## Bequests/Gifts in Wills

### Over \$5 million revenue

Bush Heritage Australia – *Bush Legacy Circle & bequest reconfirmation campaign*  
Cancer Council NSW – *Bequest Innovation*  
Peter MacCallum Cancer Foundation – *Where there's a Will there's a way. Peter Mac's record year for Confirmed Bequestors - Triumph through Targeting and Tenacity*

### Under \$5 million revenue

Assistance Dogs Australia – *Gifts in Wills Relationship and Growth Campaign*  
Indigenous Community Volunteers – *ICV Bequest Encouragement Campaign*



## Capital Campaigns

### Over \$5 million

University of Melbourne – *Believe - the Campaign for the University of Melbourne*

### Under \$5 million

No finalists in 2017

## Special Events

### Over \$5 million

Asylum Seeker Resource Centre – *ASRC Telethon on World Refugee Day*

Act for Peace – *Act for Peace Ration Challenge*

Cure Brain Cancer Foundation – *Charlie's Million\$Mission*

Peter MacCallum Cancer Foundation – *Racing to success by maximising income through mass participation fundraising events*

### Under \$5 million

Women's Legal Service Queensland – *Dancing CEOs 2016*

Give Where You Live Foundation – *Surf Coast Trek 2016*

Kids Under Cover – *The Cubby House Challenge*

## Special or Emergency Projects

No finalists in 2017

## National Sponsors 2017



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