



**FIA**

**Fundraising  
Institute  
Australia**

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The Professional Body for Australian Fundraising

# Annual Report 2018

**FIA LAUNCHES  
CODE TRAINING**



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# About Fundraising Institute Australia

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

Since its establishment in 1968 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 the 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 are signatory to FIA's Code of Conduct, and therefore uphold the ethical and professional standards of fundraising.

## PUBLIC ACKNOWLEDGEMENT OF MEMBERSHIP

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

Membership of FIA demonstrates ethical fundraising practice and signifies professionalism. Displaying the logos are a public demonstration of your commitment to the FIA Code.



**ORGANISATIONAL  
MEMBER**



**PROFESSIONAL  
MEMBER**

# State Of The Sector

**In 2018, there were 56,650 registered charities around Australia, ranging from small religious charities to large international humanitarian organisations.**

At home and abroad, these charities deliver a wide range of services and programs including medical research, animal welfare, overseas aid work, help for the homeless, protection of vulnerable children and environmental conservation. Some 23,000 of them engage in fundraising.

According to the ACNC,<sup>1</sup> Australian charities made \$142.8 billion in revenue, including \$10.5 billion in donations. The sector employs more than 1.3 million paid staff and has even more volunteers around Australia. Nearly half of the registered charities have social and community welfare as their primary purpose, with religious charities comprising 22% of these and approximately 17% identifying their mission as education.

Australians can still pride themselves on their generosity. Globally, Australia ranked second out of 146 countries in the Charities Aid Foundation's 2018 World Giving Index,<sup>2</sup> which ranks countries against the following measures: donating money, volunteering time and willingness to help a stranger.

## TRUST HIGHER IN CHARITIES THAN CORPORATES

In the annual survey of Australia's most reputable charities conducted by the Reputation Institute (RI),<sup>3</sup> the top 26 charities had better reputations than the best-ranked Australian corporations. The 2018 Australian Charity Reputation Index, which surveyed 7,699 people about Australia's 40 largest charities, also found even the worst-ranked charities polled better than many of Australia's largest companies. The report also revealed the charitable sector is valued for its services, citizenship and governance, three critical drivers for strong reputations.

The Royal Flying Doctor Service confirmed its place as Australia's most reputable charity, ranking first in the Charity Reputation Index for the eighth year in a row. CareFlight jumped one spot from 2017 to rate second overall in 2018 while Guide Dogs also rose one place to rank third. Ronald McDonald House Charities had the biggest improvement in reputation, jumping 12 spots to finish sixth overall. Speaking about the report, RI's Managing Director Oliver Freedman said: "The charity sector has managed to ride out a storm of mistrust and come out the other side as a stronger, more reputable sector."

Another study suggests Australians tend to trust charities at comparatively high levels compared with other countries, but they have concerns about charities' approaches to fundraising. In a survey of 5,900 people across eight countries\* run by More Strategic and NFP Synergy<sup>4</sup> and supported by FIA, researchers found Australians ranked charities fourth in their trustworthiness against a range of institutions after the armed forces, police and schools. Just over half of Australians said charities were ethical and honest and 74% of Australians reported that charities played a vital role in our society.

However, the study also revealed that 65% of Australians are feeling overwhelmed with requests for donations and people generally don't understand how fundraising works. The report concluded that charities "needed to show donors appreciation and respect, demonstrate impact and focus on donor relationships over profit."

<sup>1</sup> Australian Charities and Not-for-profits Commission website, The Australian Charity Sector

<sup>2</sup> Charities Aid Foundation's 2018 World Giving Index

<sup>3</sup> Australian Charity Reputation Index 2018

<sup>4</sup> Standing Out in Uncertain Times, More Strategic/NFP Synergy report. \*The countries in the International study conducted in August 2018 were the USA, Canada, UK, Ireland, Germany, Holland, Australia and New Zealand.

The NAB Consumer Anxiety Index<sup>5</sup> rose in both Q2 and Q3 this year, underpinned by higher concerns over job security and government policy. Cost of living is still the biggest driver of consumer anxiety in Australia. Overall, more consumers said they increased spending on essentials during Q3, but they spent less on non-essentials like eating out and entertainment. Australians generally cut back on charitable donations throughout the year.

On a brighter note, the NAB Charitable Giving Index<sup>6</sup>, which measures charitable giving through online channels, reported that significant numbers of Australians have donated to charities in the past 12 months with the average donation per person holding steady at \$350. The rate of charitable giving in Australia increased 1.2% over the year to February 2018, more than reversing a -1.0% fall in the same period last year. Despite this encouraging improvement, overall growth is still relatively weak and below the average growth rate of 4.7% seen since late 2011.

South Australia was the state with the highest growth in giving (11%) underpinned by exceptional growth in charitable lotteries. Charitable giving in Victoria (2.9%) and the Australian Capital Territory (2.9%) also outperformed the national average. However, giving fell dramatically in the Northern Territory (-9.8%) and Western Australia (-6.0%).

Charitable giving grew in three categories: lotteries (9.2%), cancer (6.0%) and community service and children/family (4.3%). Medical research was flat while growth fell in all other categories led by 'other' charities (-5.3%). Humanitarian service charities still attracted the highest share of online giving (32%), but this has fallen from 39% since late 2010 while lotteries have snowballed, almost doubling to 17% from 9% in 2011.

Pareto's Fundraising 2018 Benchmarking Report<sup>7</sup>, which has charted the changes in donor giving over the past 10 years, uses data from 80 charities operating in Australia. It reported that 2017 saw an overall 4.5% decline in income for these charities, but when gifts in Wills were excluded, individual giving continued to grow for charities of all sizes. About half also saw their cash programs grow over the past two years.

The Pareto report also noted that donors regularly giving to charities have been on a steady increase across the past decade, and this growth is expected to continue with the average regular giver donating \$347 in 2017. However, overall rates for event-based fundraising, gifts in Wills, cash and child sponsorship decreased between 2016 and 2017. Retention of donors has been steadily declining and poses one of the most significant risks to future income stability.

## PHILANTHROPY GROWING

Meanwhile, the 2018 Koda Capital Australian Giving Snapshot<sup>8</sup> which analyses Australian Taxation Office statistics, noted only 33% of Australian taxpayers donate to charity and claim a deduction. Tax-deductible giving had fallen 7.2% from \$3.1 billion to \$2.9 billion. Charities collected \$143 billion in annual revenue, but only 7% came from donations and gifts in Wills. The report warned growth in the giving population "was not evident," and new money was coming from a smaller number of wealthier donors who expected a return on investment. Workplace giving is also struggling, down from \$43 million to \$35 million in the last 12 months.

More positively, the Koda report revealed private ancillary funds (PAFs) are growing with 1,284 PAFs now established and growing at a rate of 8%. PAFs now distribute \$457 million a year to charities, and that distribution has tripled in six years. However, PAFs remain mysterious to most charities. The report also revealed that women give more of their income to charity and a higher portion of women gave compared to their male counterparts. Koda Capital concludes charities need

<sup>5</sup> NAB Quarterly Australian Consumer Behaviour Survey Q2 and Q3 2018

<sup>6</sup> NAB Charitable Giving Index, February 2018

<sup>7</sup> 2018 Pareto Benchmarking Report

<sup>8</sup> Koda Capital Australian Giving Snapshot 2018

to be more businesslike and generate more revenue outside of traditional donation methods with successful charities operating more like sustainable businesses than conventional charities.

The 2018 JBWere Support Report<sup>9</sup> found strong growth in large and visible giving and in structured giving through PAFs. Grants made through these plus other structured giving are set to grow around 17% of all giving by 2036, up from 7% in 1996. There is still considerable growth expected from the high net worth individuals' area. There are also opportunities for growth in public ancillary funds/community foundations.

The opportunity to gain market share appears to be led by universities, medical research, arts and culture and perhaps the environment. International aid already enjoys a large percentage of giving, but given its donor base, maintenance of that share would be a good result. The largest organisations dominate fundraising with the biggest 10% of charities receiving 94% of all donations and the top 25 alone, almost 20% of the total. The return on investment in fundraising has fallen consistently over the last decade due partly to competition; however, it is still attractive at around \$5 raised for each \$1 spent.

Finally, on the jobs front, NGO Recruitment's Fundraising Salary Snapshot<sup>10</sup> warns that growing demand for fundraising skills within the sector has created a shortage of fundraisers, ranging from assistants and major gifts experts to gifts in wills fundraisers. There are also demands for fundraisers in direct marketing and digital. These shortages are expected to persist in 2019.

<sup>9</sup> JBWere Support Report 2018

<sup>10</sup> NGO Recruitment 2018 Fundraising Salary Snapshot

# Chair's Report

**FIA is a far different organisation than it was 10 years ago. As a member, it can be hard to truly understand what our peak body does on a day-to-day basis.**



In recent years, however, the Institute has been undertaking real, significant change for this sector which makes up \$142.8 billion of the economy and supports most of the vulnerable people in this country and further afield.

In my first report as Chair, it gives me great satisfaction to recount FIA's continuing evolution and the achievement of some critical milestones in 2018.

However, first, a significant farewell. In June, Rob Edwards stepped down as CEO after seven years at the helm. With Rob's guidance, FIA took one of its most significant strides in becoming financially robust, with the ability to turn its attention to growth. Membership grew, we developed stronger relationships with regulators and government representatives around Australia, revised the self-regulatory Code for best practice fundraising, created a comprehensive education program with dedicated pathways for fundraisers at all levels, and undertook a brand refresh. We heartily thank him for his leadership across a critical period for FIA.

Now in the second year of our 2020 strategy to advance Australian fundraising, we welcomed Katherine Raskob as our new CEO in July. Katherine's knowledge of member organisations and her experience across commercial and not-for-profit environments in senior leadership and marketing/communications roles will be invaluable as we embark on our next stage of growth.

Quite properly, Katherine has spent her first few months meeting members, building relationships with government officials and looking at ways to increase organisational membership and deliver more member benefits. A natural communicator, she is ready to tell the good stories of how fundraising impacts positively on the broader community. I believe FIA has an exciting future with Katherine on board.

Her appointment comes at a time of change at FIA. In 2018, with the Board's blessing and as part of our current three-year strategic plan, FIA made significant investments in rebranding and self-regulation.

The new FIA brand has a professional look and feel. It reflects our desire to be the authority on best practice, and better reflects the organisation's vital role as Australia's peak body for professional fundraisers. For those interested in history, the new look and logo arrive precisely 50 years after FIA's predecessor organisations were established in 1968.

The revised FIA Code, which came into force on 1 January following an extensive consultation process, puts a big stamp on the fundraising regulatory environment. By continually demonstrating responsible and ethical conduct, we will continue to build regulator and donor confidence and reduce pressure for the authorities who face frequent speculative calls for more red tape.

We are, of course, collectively proud of the great work our sector has delivered again this year, and the 2018 FIA National Awards for Excellence in Fundraising provided the perfect platform to showcase this good work. Attended by nearly 400 fundraisers, the FIA Awards served as a poignant reminder of how fundraising helps our communities in so many ways. The evening showcased original campaigns, promoted outstanding fundraising results and boosted the profile of exceptional individuals, teams and volunteers. I want to congratulate everyone who took the time and effort to submit entries, and I strongly encourage all members to enter the 2019 Awards and have your efforts acknowledged by your peers.

FIA's strength also comes from the commitment of the more than 200 volunteers who willingly give their time to support us. We have many fantastic people who sit on state committees or provide mentoring, professional development, networking activities and education courses. They are very skilled people, and it takes hours of time.

Our volunteers provide FIA with the resources, skills and knowledge to meet its mandate. I warmly thank them and look forward to their continuing support in 2019. Volunteers are the lifeblood of FIA, and we would not exist without them.

I also want to take this opportunity to express my gratitude to the members of the FIA Board. We have worked well as a team this year, and I appreciate the energy and commitment each person has brought to the table for FIA and the broader fundraising community. In March, we welcomed five new directors to the Board:

Ben Holgate MFIA, Director Marketing and Fundraising, MS Limited (VIC)

Stephen Mally FFIA CFRE, Director, FundraisingForce (NSW)

Meredith Dwyer FFIA CFRE, Director, Homemade Digital (QLD)

Michelle Folder MFIA, Business Development Manager, Hobart City Mission (TAS)

Dr. Jim Hungerford MFIA, CEO, The Shepherd Centre (NSW)

We are very grateful for your wise counsel during your first year of service.

At the same time, we heartily thank those Board members who stepped down in 2018 after their years of service:

Nigel Harris FFIA CFRE, CEO, Mater Foundation (QLD)

Zoe Karkas FFIA, Principal, Why Not This & Associates (VIC)

Andrew Giles FFIA, CEO, Garvan Research Foundation (NSW)

Ben Cox FFIA, Fundraising and Communications Manager, Brisbane Legacy (QLD)

Sophie Davidson MFIA, Senior Manager Philanthropy and Development, WWF Australia (TAS)

I especially single out former Chair Nigel Harris who championed the sector sustainability taskforce which ultimately led to our new Code and Code Authority. Nigel has such passion for our sector and is inspiring and insightful and I was grateful to serve with him for three years. Thank you all for the dedication you have given to FIA and your fellow fundraisers.

Finally, on behalf of the Board, I wish to thank the FIA staff. FIA could not develop and provide services to members nor advocate on behalf of professional fundraising if it were not for the energy, professionalism and dedication of its staff. I thank the FIA team for their hard work and exceptional efforts in 2018.

When I became Chair of the FIA Board, I said my motivations were to increase membership value for FIA members, advance the profession of fundraising and to encourage the public to see how impactful our sector can be. These are still my goals, and I look forward to working in 2019 with Board members, Katherine, her staff and the membership to promote the profession of fundraising and encourage Australians everywhere to see its virtues. Here's to a great 2019.

**James Garland FFIA CFRE**  
**CHAIR OF THE FIA BOARD**



# Chief Executive Officer's Report

**I am delighted to present my first annual report for Fundraising Institute Australia, having taken the CEO reins in July 2018. Meeting members and other key stakeholders in the sector has been my focus, and in every case, I have been warmly welcomed.**



Financially, FIA is in a sound position. The 2018 Conference and Awards night produced a budget surplus thanks to greater sponsorship, a record number of exhibitors and prudent management of expenses. Membership renewals were steady in 2018 and we have made significant inroads with new member acquisition. While education was down on in-class attendance this year, our online learning is growing with over 2,000 registering for Code training. Our state-based events also made a surplus from an incredible volume of events and activities across Australia.

Pleasingly our Jobs Service bulletin, with over 5,000 subscribers, continued to exceed budget this year, reflecting the sector's appreciation of FIA's reach in the fundraising community.

In this financial year, we made significant investments in our new self-regulatory regime and undertook an exciting brand refresh of FIA, including a new website.

On 1 January, the new FIA Code came into force, delivering effective self-regulation across our sector.

In June, we refreshed our brand, featuring a contemporary and authoritative look. Developed by March One, with input from FIA members, the refresh is helping to cement FIA's position as the peak self-regulatory and educative body for professional fundraising.

In 2018 we were also busy on the regulatory front, making numerous submissions and meeting with government officials on a wide range of issues. In October I appeared before the Senate Committee on Charity Fundraising in the 21st Century. This committee is examining the current framework of fundraising regulation for charities and options for reform. I argued the merits of a light-touch approach to fundraising regulation and urged governments to commit to harmonising fundraising regulation to reduce red tape for our sector.

In professional development, we offered nine skills-specific short courses and masterclasses in 2018, including two new short courses in direct response fundraising and donor engagement. We will be developing further products using a "blended learning" approach, with both online and in-class offerings to meet the needs of our members and the broader fundraising community.

FIA retained its strong position as the provider of the sector's pre-eminent annual conference. FIA Conference 2018 attracted 840 fundraisers from across Australia to Sydney for three days of intensive professional development from overseas and local experts and networking opportunities. The quality program was a reflection of the outstanding work performed by the 2018 conference program committee led by Donor Republic's Marcus Blease and the FIA conference and events team.

Meanwhile, our network of seven state and territory committees assures FIA's national presence. A variety of events held throughout the year across Australia gave members education and networking opportunities as well as a voice on issues affecting fundraisers.

The Include a Charity campaign to encourage more gifts in Wills is now truly embedded into FIA's structure and culture. The advisory committee, chaired by Xponential's Roewen Wishart, continued its focus to make gifts in Wills a social norm in the community. The September 2018 campaign, led by Campaign Director Helen Merrick, involved a successful digital and PR campaign aimed at the 55+ age group. Tactics this year to increase public and sector engagement included a series of supporter events in five cities with international fundraising expert Dr Clare Routley and exposure on Channel 9's Today Extra, broadcast nationally during Include a Charity Week.

Thanks to a generous \$50,000 grant from Australian Executor Trustees' Learning for Impact Program, the Include a Charity team organised a study tour in October for seven gifts in Wills fundraisers to study the legacy fundraising landscape in the UK. The scholars are now sharing their findings with colleagues and the broader fundraising community.

FIA head office internal capacity was enhanced to support the needs of members and meet the challenges of the strategic plan. We have recruited in education and training; conference and events; marketing, communications and membership; database operations, and Code administration.

I want to thank our national partners Blue Star, March One, Go Fundraise and DCA for their generosity and ongoing support, as well as our many other commercial partners who generously resource our national and state events throughout the year. I would also like to thank James Garland, Chair of the FIA Board, and all Directors for their support, input and guidance during the year. I can honestly say I'm positively overwhelmed by the collective wisdom and expertise that appears in our boardroom every quarter!

I also thank the many volunteers who devote enormous amounts of time and energy to FIA events, committees, special interest groups and other FIA programs throughout the year. Finally, a huge thank you to my hard-working and professional team who coordinate all FIA programs and work hard to ensure our members have the best possible member journey with us.

**Katherine Raskob**

**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 2018 as audited by K S Black & Co.**



## SUMMARY OF THE FINANCIAL RESULTS

The 2020 Strategic Plan proposed a major shift in the positioning of FIA as a representative organisation for the sector. This would see FIA become an 'industry' as well as a 'professional' body, that is, representing the interests of 'fundraising' in its many facets: organisations, professional fundraisers and suppliers to the sector. While the last few years have seen FIA building reserves, the plan for the period from 2017-2019 is to invest in the development of resources and staffing to achieve the goals set out in the plan with a return to surplus set for 2020.

While the budget developed for 2018 called for a deficit of \$107k this increased with staffing changes and the full costs of the rebranding project to \$182k.

The real success for FIA this year has been the uptake and acceptance of FIA's newly launched online Code course with over 2,000 registrations. This has grown FIA's engagement levels to over 7,600 attendees at FIA training and networking activities an increase of 20% on last year.

These results would not be possible without the significant contribution of FIA's staff and network of 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

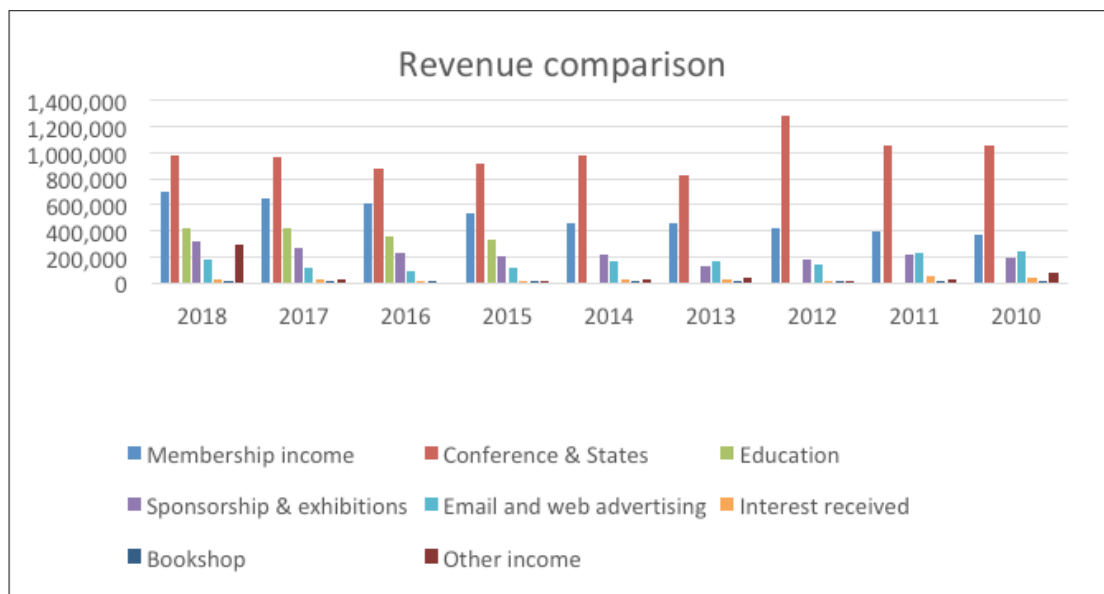
Substantial work has been undertaken over the last two years with the appointment of a key committee of sector leaders to drive a sector sustainability review which culminated in a major revision of the FIA Code, introducing new governance and accountability measures as well as protection for those in vulnerable circumstances. This work was then rolled out into the online Code course which has seen over 2,000 registrations by sector participants. This uptake and acceptance of the Code is a major success for FIA with the development of the sector self-regulatory regime a significant plank in FIA's offering. The surpluses achieved in prior years have allowed FIA to invest retained earnings into this valuable body of work.

We have also continued to grow a portfolio of online education products and further work is being undertaken in developing our online offerings as our long term interests will be served by having both online and in class offerings to meet the market.

## INCOME

2018 saw the roll-out of a new membership fee structure which has been well received by the FIA membership and resulted in a 17% increase in membership income for the year. This combined with another successful conference and awards night and continued growth from advertising services were great successes for FIA during the year and softened the impact of a slow down in general attendance numbers. It should be noted that the income from contributions to the Include a Charity campaign is only applied against expenses from this campaign which effectively 'ring fences' the income.

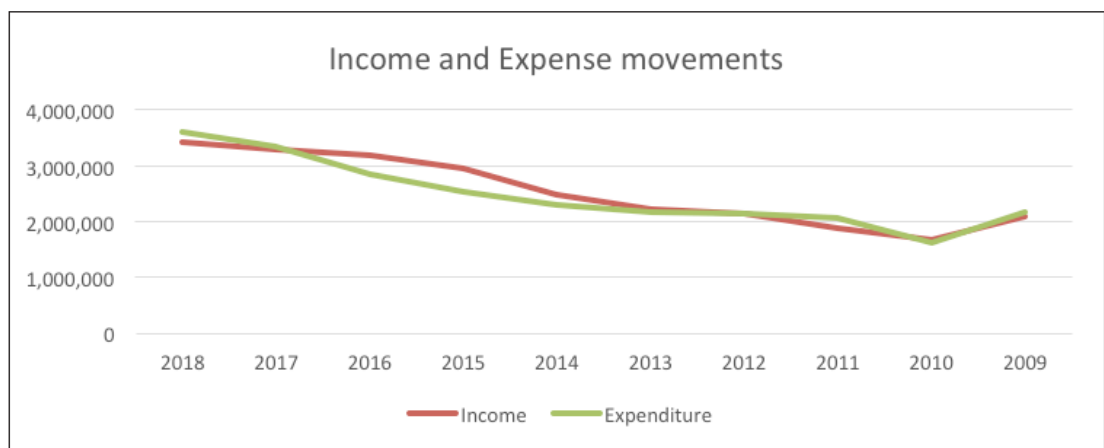
The chart below shows the income contribution from each revenue stream highlighting the weight of each key area of the business. Of note is that income has increased over 50% in this time.



## EXPENSES

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

The chart below shows the movement of total income and expenses from 2009 to 2018.



## OUR FINANCIAL POSITION

The 2018 budget was cast to reflect the strategic plan to reduce reliance on conference income by growing the contribution from membership income. This was combined with significant investment in an organisational rebrand, staffing, production of the online code course and the regulatory affairs program with the full year impact of the appointment of the Code Authority and the roll out of the mystery shopping program. The accumulated effect of these strategies has resulted in a planned overall net cash outflow of \$485k reducing our cash position to \$2M at year end.

## FINANCE AND AUDIT COMMITTEE

2018 saw a change to the serving members of the Finance and Audit Committee and I would like to take this opportunity to acknowledge the outgoing committee members for their many years of service to FIA and their ongoing support:

Nigel Harris FFIA CFRE

Brian Holmes FFIA CFRE

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

James Garland FFIA CFRE

Paul Flynn MFIA

Jim Hungerford MFIA

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 2018.

**Trudi Mitchell MFIA**

**HONORARY TREASURER**

# Regulatory Affairs Report

## EMBRACING A NEW SELF-REGULATORY CODE

In January, the revised FIA Code came into force, following in-depth consultations with our members. The Code aims to raise standards of conduct across the sector by going beyond the requirements of government regulation. By continually demonstrating ethical behaviour, FIA believes fundraisers will build regulator and donor confidence in the sector, leading to fewer calls for government intervention.

In March, FIA ramped up its mandatory online Code training and heavily promoted the course to the membership. By the end of 2018, more than 2,000 fundraisers had registered for the Code course or completed it, sending a signal to regulators and other industry observers that self-regulation is working.

## MONITORING MEMBER COMPLIANCE

Our independent Code Authority met quarterly to monitor compliance with the Code. Capably chaired by former Senator the Honourable Ursula Stephens, the Authority has examined member treatment of donors in vulnerable circumstances and has encouraged greater donor care, including respect for peoples' preferences to limit the number of charity solicitations they receive.

FIA created a website video with Ursula which was used to promote the Code and the work of the Code Authority. In October, we appointed Christopher Zinn, a well-respected consumer advocate and media commentator, to the Code Authority to represent donor and consumer interests.

## WORKING WITH THE ACNC AND OTHER GOVERNMENT STAKEHOLDERS

Throughout 2018, the FIA CEO and regulatory affairs team met with government officials, federal/state ministers and shadow ministers on a variety of matters. Early in the year, FIA met with the new ACNC Commissioner Dr Gary Johns and committed to working constructively with the Commission over the next term. Dr Johns also spoke at the FIA National Conference about his goals for the ACNC.

## APPEARING BEFORE THE SENATE COMMITTEE ON CHARITY FUNDRAISING IN THE 21ST CENTURY

In October our CEO, Katherine Raskob, appeared before the Senate Committee on Charity Fundraising in the 21st Century which is reviewing the current framework of fundraising regulation for charities and options for reform. FIA argued the merits of a light-touch approach to fundraising regulation and urged governments to commit to harmonising fundraising regulation within two years to reduce red tape for the sector. The report is due early in 2019.

## ENCOURAGING STATE FUNDRAISING REGULATORY REFORM

Significant regulatory developments have occurred at a state level, which fundamentally alter the landscape for fundraising reform. Victoria, NSW, SA and the ACT have initiated reforms that, once finalised, promise to substantially reduce red tape for fundraising. These measures, if adopted in the same form by all states, would resolve the lion's share of issues relating to misalignment of fundraising licensing and application processes, the largest source of red tape.

Greater cooperation and sharing of technology platforms between state fair trading departments and the ACNC offers the prospect of a one-stop solution for nation-wide campaign registration and reporting.

## **Participating in the ACNC Five-Year Review**

FIA made a submission to the five-year review of the Australian Charities and Not-for-profits Commission. We urged the ACNC to focus on its core objective as a regulator in maintaining public trust in the charitable sector through the establishment and maintenance of a comprehensive register of not-for-profit organisations. The ACNC Review Report was published in late August. It contained a chapter on fundraising, including a recommendation for regulatory reform via an amendment to the Australian Consumer Law and a mandatory code for fundraising. If implemented, this would amount to a new layer of statutory regulation of the sector, which FIA opposes.

## **Influencing new ACCC Guidance for Fundraising**

An important outcome of the Australian Consumer and Competition Commission's review of the Australian Consumer Law (ACL) was new guidance on how the ACL applies to charitable fundraising. FIA contributed to developing guidance that helps clarify how the consumer laws impact our sector.



## **Advocating for DGR Reforms**

In a submission to Treasury, FIA opposed a proposal to introduce a formal rolling review of DGR eligibility and annual certification. FIA advocated a more proportionate alternative consistent with the ACNC's "Report Once" policy to require yearly certification as part of the Annual Information Statement coupled with random auditing of DGRs. FIA argued that complying with these requirements would add significantly to the red tape burden on the sector and is at odds with the government's frequently stated objective to lower the regulatory impact on charities.

## **Supporting a light-touch approach to regulating overseas conduct**

FIA made a submission to government on proposed "conduct standards" for charities operating overseas. The conduct of charities, whether at home or abroad, has a direct and significant bearing on donor trust and support for fundraising. FIA encouraged Treasury to take a 'principles'-based approach to regulating the overseas conduct of charities in the interest of limiting the regulatory burden on the sector.

## **Ending a period of heightened scrutiny of telemarketing**

FIA met with Australian Communications & Media Authority officials in mid-July who confirmed that the 12-month period in which fundraising was under scrutiny as a 'priority compliance area' had come to an end without any finding of serious or systemic problems regarding its use of telephone and digital media in donor solicitations.

## **Strengthening Supply Chain Governance**

In November, FIA sought to mitigate a further round of attacks on workplace practices in the face-to-face fundraising sector by publishing a suite of member-only governance resources intended to support compliance with Commonwealth workplace laws within fundraising supply chains. FIA partnered with the Labour Standards Centre of Excellence to publish a new Practice Note: Fundraising Supply Chain Governance, together with two member-only template resources which are available to download from the FIA membership portal, including an example Fundraising Supplier Conduct Policy and Fundraising Responsibility Standards Statement.

# Financial Report

## STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME

for the Year Ended 31 December 2018

		2018	2017
	Note	\$	\$
Revenue	2	3,414,145	3,270,363
Administration expenses		(73,493)	(138,761)
Conference, workshop and campaign expenses		(1,937,372)	(1,705,807)
Occupancy expenses		(162,787)	(127,730)
Employee benefits expense		(1,410,485)	(1,350,751)
Depreciation and amortisation	3	(12,234)	(9,721)
		<hr/>	<hr/>
		(3,596,371)	(3,332,770)
		<hr/>	<hr/>
<b>Deficit before income tax</b>		<b>(182,226)</b>	<b>(62,407)</b>
		<hr/>	<hr/>
<b>Deficit after income tax expense</b>		<b>(182,226)</b>	<b>(62,407)</b>
		<hr/>	<hr/>



## STATEMENT OF FINANCIAL POSITION

### for the Year Ended 31 December 2018

	Note	2018 \$	2017 \$
<b>ASSETS</b>			
<b>Current Assets</b>			
Cash and cash equivalents	6	1,965,432	2,451,266
Receivables	7	375,956	236,846
Other assets	8	2,300	2,800
<b>Total current assets</b>		<b>2,343,688</b>	<b>2,690,912</b>
<b>Non-current assets</b>			
Software, plant and equipment	9	23,811	20,660
Rebrand and Development costs	18	89,559	-
<b>Total non-current assets</b>		<b>113,370</b>	<b>20,660</b>
<b>TOTAL ASSETS</b>		<b>2,457,058</b>	<b>2,711,572</b>
<b>LIABILITIES</b>			
<b>Current liabilities</b>			
Payables	10	134,397	191,690
Provisions	12	51,998	91,553
Deferred income	11	1,329,779	1,276,112
Funds held on trust		46,040	53,177
<b>Total current liabilities</b>		<b>1,562,214</b>	<b>1,612,532</b>
<b>Non-current liabilities</b>			
Provisions	12	18,471	40,441
<b>Total non-current liabilities</b>		<b>18,471</b>	<b>40,441</b>
<b>TOTAL LIABILITIES</b>		<b>1,580,685</b>	<b>1,652,973</b>
<b>NET ASSETS</b>		<b>876,373</b>	<b>1,058,599</b>
<b>EQUITY</b>			
Accumulated funds		876,373	1,058,599
<b>TOTAL EQUITY</b>		<b>876,373</b>	<b>1,058,599</b>

## STATEMENT OF CHANGES IN EQUITY

### for the Year Ended 31 December 2018

2018	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2018	1,058,599	1,058,599
Deficit for the year	(182,226)	(182,226)
<b>Balance at 31 December 2018</b>	<b>876,373</b>	<b>876,373</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 2018

	Note	2018 \$	2017 \$
<b>Cash from operating activities:</b>			
Receipts from members and customers		3,745,140	3,582,507
Payments to suppliers and employees		(4,090,723)	(3,700,460)
Interest received		9,472	13,538
<b>Net cash (used in)/provided by operating activities</b>	<b>14</b>	<b>(336,111)</b>	<b>(104,415)</b>
<b>Cash flow from investing activities:</b>			
Payment for non-current assets		(15,385)	(15,330)
Payment for rebranding		(134,338)	
<b>Net cash (used in)/provided by investing activities</b>		<b>(149,723)</b>	<b>(15,330)</b>
<b>Net (decrease)/increase in cash and cash equivalents held</b>		<b>(485,834)</b>	<b>(119,745)</b>
Cash and cash equivalents at beginning of financial year		2,451,266	2,571,011
<b>Cash and cash equivalents at end of financial year</b>	<b>6</b>	<b>1,965,432</b>	<b>2,451,266</b>

Level 1  
251 Elizabeth Street  
SYDNEY NSW 2000

75 Lyons Road  
DRUMMOYNE NSW 2047

# K.S. Black & Co.

ABN 48 117 620 556

20 Grose Street  
NORTH PARRAMATTA NSW 2151

PO Box 2210  
NORTH PARRAMATTA NSW 1750

## Auditors Independence Declaration To the Committee of Fundraising Institute Australia

In accordance with the requirements of section 60-40 of the *Australian Charities and Not-for-profits Commission Act 2012*, as lead auditor for the audit of Fundraising Institute Australia for the year ended 31 December 2018, I declare that, to the best of my knowledge and belief, there have been:

- a. No contraventions of the auditor independence requirements of the 60-40 of the *Australian Charities and Not-for-profits Commission Act 2012* in relation to the audit; and
- b. 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 30<sup>th</sup> day of January 2019

## Independent Auditor's Report

To the members of Fundraising Institute Australia

We have audited the financial report of Fundraising Institute Australia, which comprises the statement of financial position as at 31 December 2018, the statement of comprehensive income, statement of changes in equity and statement of cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies, and the responsible entities declaration.

In our opinion the financial report of Fundraising Institute Australia has been prepared in accordance with Division 60 of the *Australian Charities and Not-for-profit Commission Act 2012*, including:

- (a) giving a true and fair view of the registered entity's financial position as at 31 December 2018 and of its financial performance for the year then ended; and
- (b) complying with Australian Accounting Standards to the extent described in Note 1, and Division 60 of the *Australian Charities and Not-for-profit Commission Regulation 2013*.

### Basis for 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 registered entity in accordance with 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 believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

### Responsibility of the Responsible Entities for the Financial Report

The responsible entities of the registered entity are responsible for the preparation of the financial report that gives a true and fair view and have determined that the basis of preparation described in Note 1 to the financial report is appropriate to meet the requirements of the *Australian Charities Not-for-profit Commission Act 2012* of and the members. The responsible entities' responsibility also includes such internal controls as the responsible entities determine is necessary to enable the preparation of a 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 registered entity's ability to continue as a going concern, disclosing as applicable, matters relating to going concern and using the going concern basis of accounting unless the responsible entities either intend to liquidate the registered entity or to cease operations, or have no realistic alternative but to do so.

The responsible entities are responsible for overseeing the registered entity's financial reporting process.

## **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 when it exists. Misstatements can arise from fraud or error and are considered material if, 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.

As part of an audit in accordance with Australian Auditing Standards, we exercise professional judgment and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial report, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the entity to cease to continue as a going concern.

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- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.
- Obtain sufficient appropriate evidence regarding the financial information of the entities or business activities within the Group to express and opinion on the financial report. We are responsible for the direction, supervision and performance of the Group audit. We remain solely responsible for our opinion.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

KS Black & Co  
Chartered Accountants

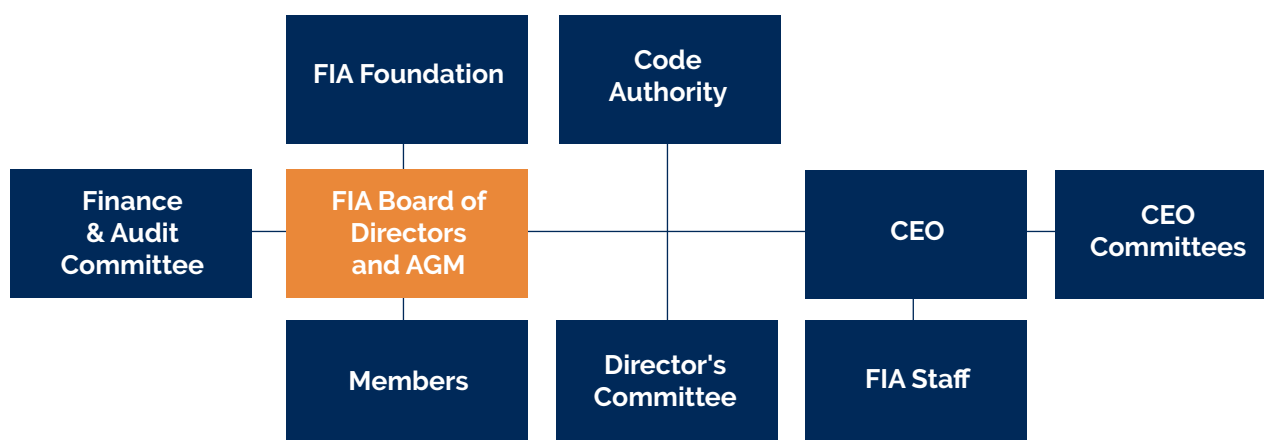


Scott Bennison  
Partner

Dated: 30/1/19  
Sydney

# 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 management strategies, 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 or 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.

# FIA Board of Directors 2018

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 2018 and looks forward to serving with them in 2019.



## **CHAIR 2018**

### **James Garland FFIA CFRE**

Director, Garland Blanchard

Appointed Chair 2018, Appointed Director March 2016; Awards Judge 2016; VIC Presenter 2014; Conference Committee 2014, 2015; Conference Speaker 2015, 2016.



## **VICE CHAIR**

### **Paul Flynn MFIA**

Chief Executive Officer, The Hospital Research Foundation

Appointed Director April 2016; Chair Finance & Audit Committee 2016, 2017; FIA SA/NT 2016, 2017.



## **TREASURER/BOARD APPOINTED DIRECTOR**

### **Trudi Mitchell MFIA**

National Deputy Director, Australia for UNHCR

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



## **DIRECTOR (SOUTH AUSTRALIA)**

### **Elizabeth Davis EMFIA CFRE**

Principal, Human Foundations

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



## **DIRECTOR (WESTERN AUSTRALIA)**

### **Allan Godfrey FFIA**

General Manager – Marketing, Royal Life Saving Society WA

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



## **DIRECTOR (VICTORIA)**

### **Ben Holgate MFIA**

Director, Marketing and Fundraising, Multiple Sclerosis Limited

Appointed Director March 2018; Conference Speaker 2013, 2014, 2016; FIA VIC 2018.





**DIRECTOR (QUEENSLAND)**  
**Meredith Dwyer FFIA CFRE**

Director, Homemade Digital

Appointed Director March 2018; QLD Presenter 2010 - present; NSW Presenter 2015, 2016, 2017; WA Presenter 2016, 2018; SA Presenter 2017, 2018; FIA QLD 2010, Chair 2017 - present; Conference Committee 2012, 2016; Conference Speaker 2016, 2017; Awards Judge 2015 – present.



**DIRECTOR (NEW SOUTH WALES)**  
**Stephen Mally FFIA CFRE**

Director, Fundraisingforce

Appointed Director March 2018; FIA NSW 2011, 2014 – present; QLD Presenter 2016; Mentor 2014 – present; FIA Webinar Chair 2016 – 2018; Conference Committee 2013, 2015 – present; Conference Speaker 2013 – 2015; Awards Judge 2015 - 2017.



**DIRECTOR (TASMANIA)**  
**Michelle Folder MFIA**

Partnership Manager, Hobart City Mission

Appointed Director March 2018; FIA TAS 2015 – Present.



**ORGANISATIONAL MEMBER DIRECTOR**  
**Jennifer Doubell FFIA CFRE**

Executive Director, Peter MacCallum Cancer Foundation

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



**BOARD APPOINTED DIRECTOR**  
**Dr. Jim Hungerford MFIA**

Chief Executive Officer, The Shepherd Centre

Appointed Director March 2018; Awards Judge 2015.



**BOARD APPOINTED DIRECTOR**  
**Marcus Blease FFIA**

Co-Founder/Director, Donor Republic

Appointed Director February 2015; SA Presenter 2015-2016; WA Presenter 2009, 2017; Sector Sustainability Taskforce 2016; Conference Chair 2018; Conference Speaker 2009, 2011 – 2017; Awards Judge 2014.



**BOARD APPOINTED DIRECTOR**  
**Warwick Hay MFIA**

Managing Director, IVE Group

Appointed Director February 2017.

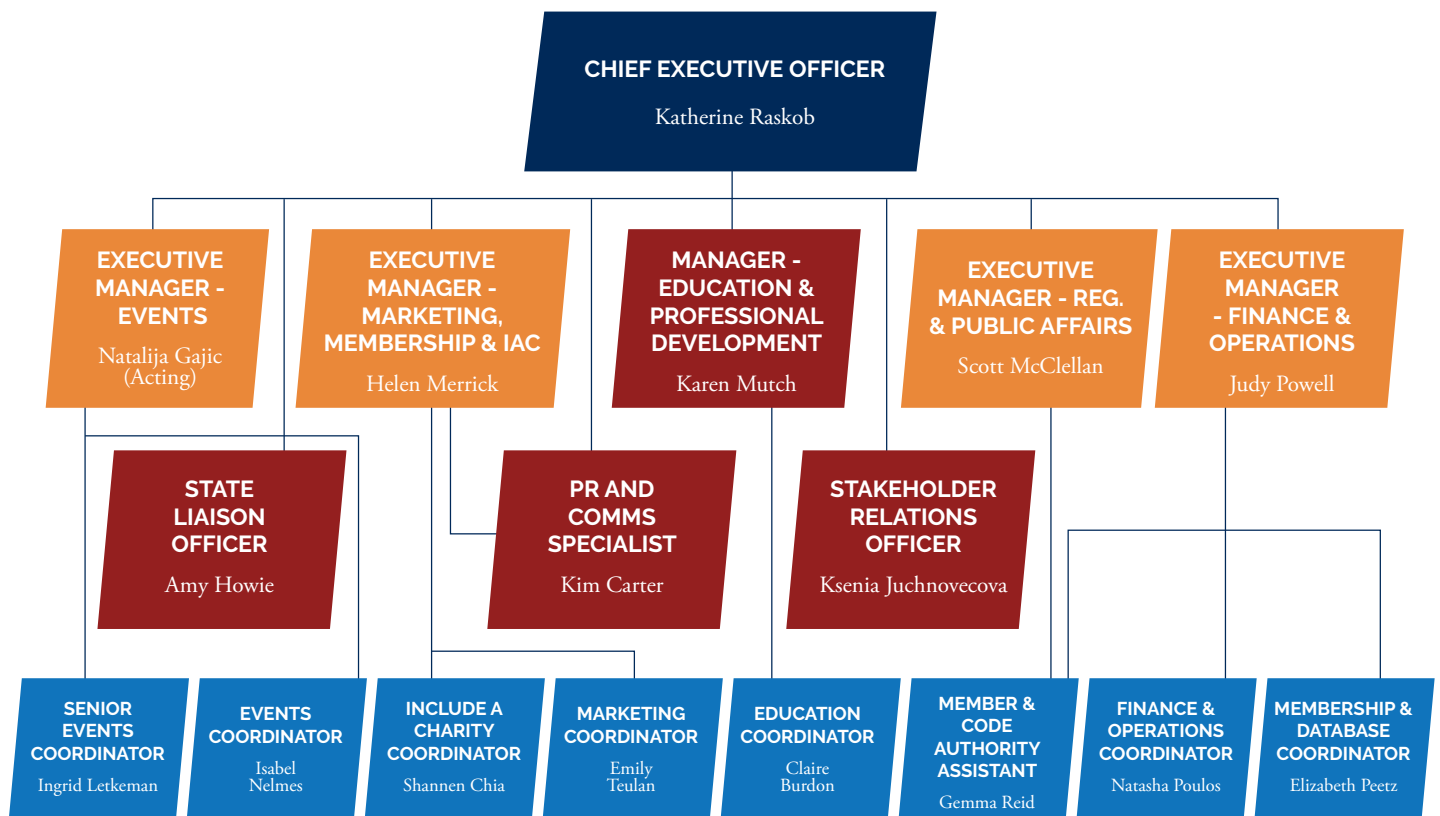
# Secretariat

The day to day operations of FIA 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



**FOUNDATION**  
**Supporting Professional Fundraising**

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 the FIA which in turn sponsors their professional development.

## **FIA FOUNDATION FUNDS RESEARCH INTO DELIVERING EXCELLENCE IN AUSTRALIAN FUNDRAISING**

In 2018 the FIA Foundation commissioned award-winning researcher Professor Adrian Sargeant, and his team from The Philanthropy Centre, who interviewed 'key players' from 10 for-purpose organisations across Australia that had been successful in achieving substantive fundraising growth.

This report 'Factors Driving Exceptional Fundraising Success: A Focus on Australian Leaders and Their Boards' examines what it takes to deliver excellence in Australian fundraising, the science of giving and the key factors of successful fundraising campaigns in Australia.

The report also examines the role of the Board and Executive Leadership, their relationship with the fundraising function and the unique contribution that they play in helping fundraising organisations succeed.

This research was funded by a generous gift in Will to the FIA Foundation from Jim Weber FFIA; and aims to honour Jim's legacy, help advance the profession and promote excellence in fundraising.

# 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 2018

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.

Leanne Angel FFIA CFRE  
Karen Armstrong FFIA CFRE  
Chris Benaud FFIA CFRE  
Marcus Blease FFIA  
Gail Breen FFIA  
Peter Burnett FFIA CFRE  
Gavin Coopey FFIA  
Ben Cox FFIA  
Peter Dalton FFIA CFRE  
Vicky Dodds FFIA  
Jennifer Doubell FFIA CFRE  
Meredith Dwyer FFIA CFRE  
Jackie Evans FFIA CFRE  
Judy Ford FFIA CFRE  
James Garland FFIA CFRE  
Jo Garner FFIA CFRE  
Andrew Giles FFIA  
Allan Godfrey FFIA  
Craig Gravestine FFIA CFRE  
Anne Gribbin FFIA CFRE  
Nigel Harris FFIA CFRE  
Maurice Henderson FFIA FAHP; CFRE  
Sharon Hillman FFIA  
Mark Hindle FFIA FAHP; CFRE  
Brian Holmes FFIA CFRE  
Tanya Hundloe FFIA CFRE  
Jannine Jackson FFIA CFRE  
Nick Jaffer FFIA

Kathy John FFIA  
Zoe Karkas FFIA  
Clare MacAdam FFIA CFRE  
Stephen Mally FFIA CFRE  
Andrew Markwell FFIA CFRE  
Evelyn Mason FFIA  
Jeremy Maxwell FFIA CFRE  
Lindsay May FFIA CFRE  
Graham McKern FFIA CFRE  
Tracy McNamara FFIA  
Leo Orland FFIA CFRE  
Martin Paul FFIA  
Heiko Plange-Korndoerfer FFIA CFRE  
Mark Quigley FFIA  
Vicki Rasmussen FFIA CFRE  
Lesley Ray FFIA CFRE  
Christine Roberts FFIA  
Rhonda Robinson FFIA CFRE  
Wendy Scaife FFIA  
Margaret Scott FFIA CFRE  
Rick Sillett FFIA  
Helen Smith FFIA  
Regina Tucker FFIA  
Kerin Welford FFIA CFRE  
Alicia Watson FFIA CFRE  
Roewen Wishart FFIA CFRE  
Savas Zacharias FFIA CFRE  
David Zerman FFIA

## EMERITUS MEMBERS AS AT 31 DECEMBER 2018

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)  
Lun Buckley (FFIA (Emeritus)  
Jennie Cameron MFIA (Emeritus)  
Peter Castleton FFIA (Emeritus)  
Diane Clark FFIA (Emeritus)  
Ray Crompton MFIA (Emeritus)  
Ron Ellis FFIA (Emeritus)  
Ted Flack FFIA (Emeritus)  
Peter Fletcher FFIA (Emeritus)  
Paul Freeman FFIA (Emeritus)

Russell Harris FFIA (Emeritus)  
Kenneth Harrison FFIA (Emeritus)  
Jenny Marchionni MFIA (Emeritus)  
Brian O'Keefe FFIA (Emeritus)  
Dennis O'Reilly FFIA (Emeritus)  
David Rose FFIA (Emeritus)  
John Townend FFIA (Emeritus)  
Michelle Trevorrow FFIA (Emeritus)  
Rosemary Wilcox FFIA (Emeritus)  
Ann Wood FFIA (Emeritus)

## HONORARY MEMBERS AS AT 31 DECEMBER 2018

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)  
Phillip Warner MFIA (Hon)  
Sid Mallory MFIA (Hon)  
Douglas Dillon MFIA CFRE (Hon)  
Andrew Watt MFIA (Hon)  
Michelle Campbell MFIA (Hon)

Mary Henderson MFIA (Hon)  
Paulette Machara MFIA CFRE (Hon)  
Myles McGregor-Lowndes MFIA (Hon)  
Ian Fraser MFIA (Hon)  
Michael Farrell MFIA (Hon)  
Ann Thomas-Haas MFIA (Hon)

## CERTIFIED FUND RAISING EXECUTIVES (CFRE) AS AT 31 DECEMBER 2018

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  
Leanne Angel FFIA CFRE  
Karen Armstrong MFIA CFRE  
Paul Bailey MFIA CFRE  
Kelly Barrington MFIA CFRE  
Chris Benaud FFIA CFRE  
Paul Benjamin MFIA CFRE  
Graeme Bradshaw FFIA (Emeritus) CFRE

Peter Burnett FFIA CFRE  
Lee Christian MFIA CFRE  
Leigh Cleave EMFIA CFRE  
Bianca Crocker MFIA CFRE  
Kerry Cutting EMFIA CFRE  
Peter Dalton FFIA CFRE  
Elizabeth Davis EMFIA CFRE  
Douglas Dillon MFIA (Hon) CFRE

Jennifer Doubell FFIA CFRE  
 Kimberly Downes EMFIA CFRE  
 Meredith Dwyer FFIA CFRE  
 Kate Eddy MFIA CFRE  
 Marla Edwards MFIA CFRE  
 Jackie Evans EMFIA CFRE  
 Peter Fletcher FFIA (Emeritus) CFRE  
 Judy Ford FFIA CFRE  
 Lorraine Fraser EMFIA CFRE  
 James Garland EMFIA CFRE  
 Jo Garner FFIA CFRE  
 Craige Gravestine FFIA CFRE  
 Anne Gribbin FFIA 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 MFIA 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  
 Cherie Nicholas MFIA CFRE  
 Lorraine Nothling EMFIA CFRE  
 Leo Orland FFIA CFRE  
 David Osborne EMFIA CFRE  
 Heiko Plange-Korndorfer FFIA CFRE  
 Cheryl Pultz EMFIA CFRE  
 Vicki Rasmussen FFIA CFRE  
 Lesley Ray FFIA CFRE  
 Patricia Roath EMFIA CFRE  
 Rhonda Robinson FFIA CFRE  
 Len Russell MFIA 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 MFIA CFRE  
 Alan White MFIA 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.

# 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 FIA.

## CODE AUTHORITY

The Code Authority processes all complaints received through the FIA Complaints Process.

Ursula Stephens (Chair)

Bruce Cotton (resigned 2018)

Ben Cox FFIA

Bill Dee (resigned 2018)

Jennifer Doubell FFIA CFRE

Scott McClellan AMFIA

Sue-Anne Wallace

Roewen Wishart FFIA CFRE

Christopher Zinn (Appointed September 2018)

## 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)

Leanne Angel FFIA CFRE

Sharon Hillman FFIA

Tracy McNamara FFIA

Roewen Wishart FFIA CFRE

## 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.

Trudi Mitchell MFIA (Chair)

Paul Flynn MFIA (Chair)

James Garland FFIA CFRE

Dr. Jim Hungerford MFIA

Joe Shannon

Nigel Harris FFIA CFRE (Resigned July 2018)



## NOMINATIONS COMMITTEE

The Nominations Committee lead 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)

James Garland FFIA CFRE

Zoe Karkas FFIA

Leo Orland FFIA CFRE

Roewen Wishart FFIA CFRE

## CEO Committees

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

## CONFERENCE 2019 PROGRAM COMMITTEE



The Committee behind the program for FIA's 42nd Conference has done an outstanding job of developing the 2019 Conference Program, catering to FIA's vast range of members. There is still much to be done before members from around Australia and the Asia Pacific region arrive at the Melbourne Convention and Exhibition Centre (MCEC).

With ongoing thanks to our 2019 conference program committee:

Nicola Norris MFIA (Chair)

Marcus Blease FFIA (Co-Chair)

Gavin Coopey FFIA

Luke Edwards MFIA

Leanne Angel FFIA CFRE

Stephen Mally FFIA CFRE

Ross Anderson MFIA

Kim Sutton MFIA CFRE

Ruthann Richardson MFIA

Carrie Fletcher MFIA

Alice Anwar

Paul Bailey MFIA CFRE

Leigh Cleave CFRE

Alex Struthers MFIA

Peter Dalton FFIA CFRE

Margaret Scott FFIA CFRE

Yvette Peterson MFIA

Vicki Rasmussen CFRE FFIA

Ruth Wicks MFIA

Emily Wigney MFIA



## CONFERENCE 2018 PROGRAM COMMITTEE



The Committee behind the program for FIA's 41st Conference did an incredible job of creating a program to meet a wide variety of members' needs. It was a great Conference, with members from around Australia and the Asia Pacific region coming to the International Convention Centre in Sydney for the conference from 7 – 9 March 2018.

Thanks to our 2018 conference program committee:

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

## PROFESSIONAL DEVELOPMENT & IDENTITY COMMITTEE 2018

The Professional Development & Identity 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	Lesley Ray FFIA CFRE
Margaret Scott FFIA CFRE	Vicki Rasmussen FFIA CFRE
Leigh Cleave FFIA CFRE	Michelle Varcoe MFIA

## MEDIA ADVISORY GROUP 2018

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	Appco Group Australia
Australian Red Cross	Cancer Council NSW
Cerebral Palsy Alliance	Cornucopia Fundraising
Fred Hollows Foundation	Heart Foundation
Starlight Children's Foundation	World Vision
WWF-Australia	

## INCLUDE A CHARITY ADVISORY COMMITTEE 2018

The Include a Charity Advisory Committee aims to promote charitable gifts in Wills in Australia. Thank you to those who volunteer their time so generously.

Roewen Wishart FFIA CFRE (Chair)  
Dr. Christopher Baker AMFIA  
Rebecca Passlow – Bush Heritage Australia  
Maise Paiva MFIA – Cerebral Palsy Alliance  
Carol O’Carroll – Cerebral Palsy Alliance  
Jakki Travers – The Smith Family  
Ian Lawton – National Heart Foundation  
Paul Evans – Makinson d’Apice  
Suzanne Brown – The Salvation Army  
Alicia Madden  
Bethan Hazell – Peter MacCallum Cancer Centre  
Karen Wall – Cancer Council Victoria

## AWARDS COMMITTEE 2018

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 on the state committees whose knowledge and expertise are an invaluable resource.

Allan Godfrey FFIA (Chair) James Garland FFIA CFRE  
Moira Clarkson MFIA

## FIA STATE/TERRITORY COMMITTEES 2018

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

Judith Ford FFIA (Chair)	Helen Falla MFIA
Alicia Edwards MFIA	Ann Ronning MFIA
Diane Kargas Bray AM EMFIA	Rose Stellino
Anastasia Davy MFIA	

### New South Wales

Stephen Mally MFIA CFRE (Chair/Director)	Jackie Evans EMFIA CFRE
Julie-Anne Macintyre MFIA	Charlotte Sangster EMFIA
Rachael Lance MFIA	Lisa Miller MFIA
Karen Firestone MFIA	Len Russell MFIA
Tessa Irwin MFIA	Cara Morrison MFIA
Christine Roberts FFIA	Anthea Cohen MFIA

## Queensland

Meredith Dwyer FFIA (Chair/Director)  
Abby Clemence MFIA  
Kim Sutton MFIA  
Alex Struthers MFIA  
Brooke Rose MFIA  
Tiffany Hardy

Katherine Ash MFIA  
Margaret Scott FFIA  
Vicki James MFIA  
Christine Anderson MFIA  
Benjamin Cox FFIA

## South Australia

Elizabeth Davis EMFIA CFRE (Director)  
Rebecca Miller MFIA (Chair)  
Andrew Petersen MFIA  
Sarah Lenigas MFIA

Kellie Bartlam  
Paul Morton MFIA  
Mark Foyle MFIA

## Tasmania

Michelle Folder MFIA (Director)  
Cath Adams MFIA (Chair)  
Sarah Moss MFIA  
Rebecca Cuthill MFIA

Kalli McCarthy  
Lisa Harris  
Brad Watson MFIA

## Victoria

Ben Holgate MFIA (Director)  
Pamela Sutton-Legaud MFIA (Chair)  
Kate Eddy MFIA  
Nichole Alfreds EMFIA

Karen McComiskey  
John Haynes  
Alan White  
Veronica Gargano

## Western Australia

Allan Godfrey EMFIA (Director)  
Anne Smith EMFIA (Chair)  
Bec Stott MFIA (Interim Chair)  
Ashlie Marshall EMFIA  
Hazel Grunwaldt MFIA  
Vicki Rasmussen FFIA

Tanya Hundloe FFIA  
Carolyn Turner MFIA  
Emma-Laureen Hiujs MFIA  
Rikki Stewart MFIA  
Laura Kazmirowicz MFIA  
Jessica Bezerra EMFIA

# Include a Charity

Include a Charity is a social change campaign of Fundraising Institute Australia (FIA) and all FIA organisation members are invited to join. We are a collaboration of over 90 charities in Australia, who cover a broad spectrum of causes and aspects of our community.

Our goal is to encourage more people to leave a charitable gift in their Will, increasing the funds invested in the sector and thereby increasing the positive impact we all have on society. By working together, we can change charitable giving forever so that over time, gifts in Wills become the norm for many rather than just a few.

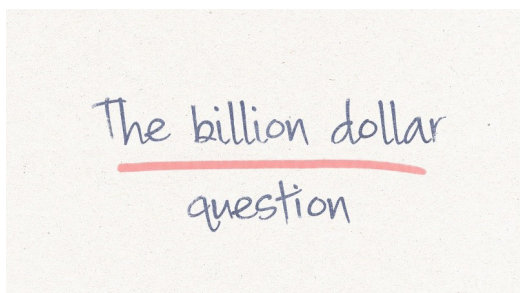
The campaign is a powerful resource for charities to improve the effectiveness of their gifts in Wills marketing, by pooling resources, undertaking world-first research projects, increasing efficiencies and saving money.

We undertook a variety of activities over the year including: training and development through a variety of events and webinars; the 7th Include a Charity Week focusing on speaking to the general community through advertising, PR and digital channels and supporting the sector through events; a world first behavioural economics project; benchmarking; innovation groups working alongside the government's Behavioural Economics unit; and undertaking our new legal engagement campaign – the billion dollar question.



## THE BILLION DOLLAR QUESTION

In March 2018 Include a Charity launched its latest legal engagement campaign concentrating on encouraging solicitors and estate planning professionals to ask the question – would you like to include a gift to charity in your Will? With support from the legal profession and based on research undertaken in late 2017, the campaign concentrated on digital, press and traditional PR to speak to this audience.





## INCREASING BEST PRACTICE AND LEARNING THROUGH THE INCLUDE A CHARITY UK STUDY TOUR

Include a Charity was fortunate to receive funding in 2018 from Australian Executor Trustee's Learning for Impact Program to develop a study tour to the UK to create 'career defining moments' for seven lucky not-for-profit fundraisers.

The study tour, which took place 7-11 October in London, exposed the fundraisers to best practice and trends in the gifts in Wills arena, giving them a rare opportunity to learn and share with their peers internationally. The tour was open to any fundraiser who had an interest in gifts in Wills and whose organisation is an Include a Charity supporter.

One of the key pillars of Include a Charity is to inspire and equip fundraisers with the latest knowledge around gifts in Wills fundraising and best practice. A study tour gave fundraisers the opportunity to learn from some of the best overseas and share their knowledge and expertise.



From L to R: Vicki Rasmussen (Charlies Foundation for Research, WA), Naomi Schofield (International Fund for Animal Welfare, NSW), Laura Henschke (Multiple Sclerosis Ltd, NSW), Nadia Aden (The Fred Hollows Foundation, NSW), Helen Merrick (Include a Charity, NSW), Eyvette Turner (National Heart Foundation of Australia, SA), Ross Anderson (RSPCA, VIC) and Jakki Travers (The Smith Family, NSW)

## THANK YOU TO OUR 2018 ADVISORY COMMITTEE:

Roewen Wishart FFIA CFRE (Chair)

Dr. Christopher Baker AMFIA

Rebecca Passlow – Bush Heritage Australia

Maisa Paiva MFIA – Cerebral Palsy Alliance

Carol O'Carroll – Cerebral Palsy Alliance

Jakki Travers – The Smith Family

Ian Lawton – National Heart Foundation

Paul Evans – Makinson d'Apice

Suzanne Brown – The Salvation Army

Alicia Madden

Bethan Hazell – Peter MacCallum Cancer Centre

Karen Wall – Cancer Council Victoria

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 41st CONFERENCE – DONORS FOR GOOD

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.



## 2018 CONFERENCE SPEAKERS

Adam Buckles	Christel Wilson	Joel Nicholson MFIA
Adriana Sung	Craige Gravestine FFIA CFRE	John Batistich
AJ Leon	Dan Geaves MFIA	Jon Lloyd
Alan White MFIA CFRE	Daniel Bernstein MFIA	Jonathon Grapsas MFIA
Alex Struthers MFIA	David Dubin	Joshua O'Rourke MFIA
Alice Anwar	David Ryder	Joshua McNeil MFIA
Alicia Madden	David Towill	Julie Lamberg-Burnet
Andrew Sabatino MFIA	Doug Dillon MFIA (Hon) CFRE	Julie-Anne Macintyre MFIA
Anna Spraggett	Ebony-Maria Levy	Karen McGrath
Anna Chalko	Erica Myers-Tattersall MFIA	Kate May
Ara Ko	Fiona McPhee	Kate Parsons
Ash Knop	Fiona MacAnally	Kate Sunners MFIA
Barbara Newhouse	Flora Grant	Kristofer Rogers
Ben Clark	Gary Johns	Leanne Angel FFIA CFRE
Ben Graetz	Glen Hill	Leigh Cleave
Bethan Hazell	Grant Barnes	Leigh Bartlett
Bianca Crocker MFIA CFRE	Helen Merrick MFIA	Louise Bedson
Bill Maddock	Ian Lawton MFIA	Lucy Jacka MFIA
Bradley Twynham	Jack Sim	Luke Bridges
Brett McDonald	Jacqui Cole	Margaret Scott FFIA CFRE
Candice Liew	James Toomey	Martin Paul FFIA
Carl Young	Jen Sharpe	Mary Anne Plummer MFIA
Carmel Macmillan MFIA	Jessica Frost	Matthew Tracey
Caroline Lord	Jessica Ross	Matthew Gibson
Carolyn Butler-Madden	Jessie White	Melanie Verges MFIA
Charlie Carpinteri	Jo Garner FFIA CFRE	Meredith Dwyer FFIA CFRE
Chris Brun	Jo Booth	Mia Lucas

Michael Blumenstein	Rebecca Passlow	Siobhan Hanbury-Aggs
Michael Evett	Rob Pyne	Sloane Silverman
Michael Field	Rob Needham	Stefan Delatovic
Nadia Menzies MFIA	Rob Edwards	Teneale Cameron
Nicholas Winfrey	Robinson Roe	Tiffany Kellar
Nicola Norris MFIA	Rod Matthews	Tim Dolan
Nuz Hameed MFIA	Ross Raeburn	Tom Hull
Patrick Salas	Ruth Wicks MFIA	Trent Osborn MFIA
Penelope Sinton MFIA	Ruthann Richardson MFIA	Vicki James MFIA
Peter Thomas MFIA	Sacha Koltun MFIA	Victoria Andrews MFIA
Peter Muffett	Sally Trainor	Vikram Chowdhary
Peter Dalton FFIA CFRE	Sarah Cornally	Will Kirsop MFIA
Rachael Lance MFIA	Sean Selleck	
Rathia Gierdien	Simon Griffiths	

## CONFERENCE SUPPORTERS

### Conference partners

- Pareto Fundraising
- Xponential

### Principal Sponsors

- Donor Republic

### Print and Mail sponsor

- Bluestar

### Major sponsors

- Inspired Adventures
- Zymzene
- Blackbaud
- Strategic Grants
- Frontstream

### Supporting sponsors

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- FR&C
- NGO Recruitment
- PFS
- BMS

### Media Partners

- Probono Australia
- F&P
- Connecting Up
- Momentary

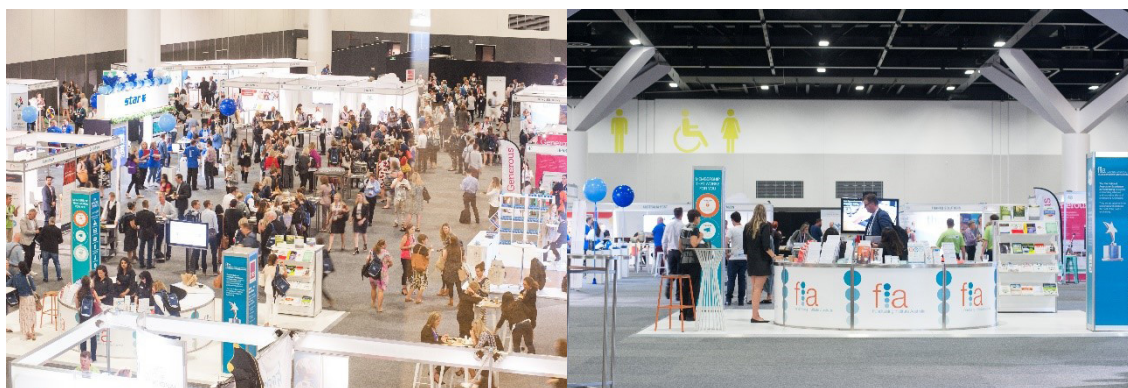
### Corporate Sponsors

- Go Fundraise
- March One

## CONFERENCE EXHIBITORS

AAKonsult	Cornucopia Consultancy	Heartburst Digital
Advanced Solutions	Creditsoft Solutions	Homemade Digital Australia
International (ASI)	Crowd Dynamics	Innovairre Communications
Apple Marketing Group	eGENTIC	Inspired Adventures
Apple Marketing Group	GalaBid	Lake Corporation
Beaumont People	GoFundraise	List Factory
Beaumont People	Good2Give	Mail Makers
Blackbaud	Good2Give	Morphate
Blackbaud	Hays Recruitment	Morphate
Candida Stationery		

NGO Recruitment	Netstrategies	IMB Bank
Precision Mail	Blue Star Group	March One
Raisely	Australia Post	Melbourne Mailing
Social Blue	Blue Shark Merchandising	Momentary
Strategic Grants	Budget Mailing Services	Mondial Telephone Fundraising
ThankQ Solutions	CauseForce	Pareto Fundraising
The Prospect Shop	CFRE	PFS
Xponential	Connecting Up	ProBono Australia
Xponential	Donor Republic	ProBono Australia
One Contact	Ezidebit	QUT
Quest	F&P Magazine	Resouce Alliance
Everydayhero	Fat Beehive	Robejohn & Associates
FrontStream	Fundraising Research &	Tomra
FrontStream	Consulting (FR&C)	Vanilla Bean Events





# 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.

FIA's comprehensive education and training program provides an opportunity for participants to enhance their skills, consolidate existing knowledge and learn new knowledge and skills, hone their leadership and management abilities, and engage in lifelong learning for continuous professional development that improves their results and drive their career forward.

This year FIA continued to grow its Core Education Program that consists of *Fundraising Essentials*, the *Certificate in Fundraising* and the *Diploma in Fundraising*. The *Fundraising Essentials* course moved online this year as an alternative option for those unable to attend the in-class course. *Fundraising Essentials* and *Certificate of Fundraising* was both online and face-to-face. The *Diploma in Fundraising* was only offered online. The online *Certificate* and *Diploma in Fundraising* continues to attract enrolments across Australia and several enquiries from overseas.

In June 2018, FIA delivered an Executive Education program – *Governance Foundations for Not-for-Profit Directors* in Sydney which was jointly presented by Australia Institute of Company Directors (AICD) and FIA facilitators. This joint initiative focused solely on educating executives and Board members of not-for-profit organisations. The two-day course emphasised 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 introduced two new Skills-Specific courses for the year, which proved to be very successful. *The Direct Response Fundraising* course provided participants with the knowledge and tools to practically apply a donor-centric approach to direct response fundraising. *The Donor Engagement to the Max!* course equipped participants with an understanding on how to build a best practice donor engagement program for any type of fundraising program.

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

In 2018, FIA offered 50 in-class courses nationally with a total of 562 enrolments. Combined with the online enrolments of 104 students, FIA professionally trained 666 students this year. FIA continues to enhance its professional development and education program to provide for professional fundraisers at all levels: entry-level staff, middle managers, senior executives and board members.

# Webinar Series

The FIA monthly Webinar Series is free for all FIA members, and provides an easy way to keep up to date on a variety of key fundraising topics throughout the year.

Our thanks to GoFundraise and their team for supporting the 2018 Webinar Series, and to all our presenters for graciously offering their time, preparing and presenting their webinars. Our thanks also to Stephen Mally FFIA CFRE for his contribution in assisting with planning and presenting the series as MC.

## TOPICS AND SPEAKERS FOR 2018:

Topic:	Presented by:
The Power of Technology and Philanthropy	AJ Leon, Misfit Inc, and Jessie White, Snapstory
Financial Dynamics of Regular Giving	Kerren Morris, Whydontwe.org
Using Neuroscience to Improve Your Fundraising Results	Simone P Joyaux ACFRE, Joyaux Associates
Future Focused Fundraising	Julie Johnson EMFIA, O'Keefe & Partners
Digital Disruption of Fundraising and Corporate Giving	Stuart Finlayson MFIA, Gofundraise and Lisa Grinham MFIA, Good2Give
11 Paths to Corporate Fundraising Excellence	Abby Clemence MFIA, O'Keefe & Partners
If You Build It, They will Come: How to Build a Community of Fundraising Ambassadors	Megan Pope, Macquarie University
Are you Maximising Google Ad Grants in the right way?	Lindsey Sun, Meow Media
Yes Minister – Sir Humphrey's Guide to Engaging Government	Mark Quigley, BA FFIA

## 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 their generous contribution to the sector and commitment to making the delivery of FIA courses possible.

### Our heartfelt thanks to:

Australian Red Cross  
Beaumont Consulting  
Cancer Council VIC  
Guide Dogs SA/NT  
Macquarie University  
National Australia Bank

QIMR Berghofer Medical Research Institute  
Ronald McDonald House WA  
Scripture Union QLD  
Stroke Foundation Westpac Banking Corporation  
Tasmanian Symphony Orchestra

# FIA Core Education

## FUNDRAISING ESSENTIALS

*FIA Fundraising Essentials* is the foundational course in fundraising offering 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. The course was offered in five states across the year, as well as online, with a total of 166 attendees across both delivery modes. 91 students enrolled in the face-to-face version and 75 students enrolled into the online version of the course.

This year the *Fundraising Essentials* course continued to be developed in the online format. We would like to thank Richard Pester for his expertise in developing the FIA online course and to all our tutors who contributed to the *Fundraising Essentials In-class course*.

### Thank you to our 2018 tutors

Frances Cinelli EMFIA

Heiko Plange-Korndorfer FFIA CFRE

Bianca Crocker MFIA CFRE

Stephen Mally FFIA CFRE

## Fish Community Solutions Scholarship

The Fish Community Solutions Scholarship was offered again in 2018 for the *FIA Fundraising Essentials* course. Applicants were required to have less than five years professional fundraising experience and be part of an organisation with a turnover of less than \$500,000 per year.

This year's scholarship was awarded to **Julia Brockhausen from Health Consumers NSW**. Health Consumers NSW represents the interests of patients, carers and their families in NSW. They believe in shaping a health system that listens to, respects, partners with and values health consumers.

## CERTIFICATE IN FUNDRAISING

The *FIA 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. This year the Certificate in Fundraising had 49 enrolments with 20 of those enrolling into the online version of the course. The face-to-face version was offered in three states with two intakes over the year.

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 2018 tutors

Daniel Bernstein MFIA

Tracey Finlay MFIA CFRE

Marcus Bleas FFIA

Maisa Paiva MFIA

Bianca Crocker MFIA CFRE

Heiko Plange-Korndorfer FFIA CFRE

## 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 2018 Scholarship Recipients were

Hannah Allsopp MFIA

Claire Dollard MFIA

Jack Quigley MFIA

Louise Walpole MFIA

## Graduating Students Class of 2018

FIA is proud to acknowledge the achievement of the following graduates of the Certificate in Fundraising for 2018:

Lauren Allnut MFIA

Connie Honaker MFIA

Hannah Allsopp MFIA

Alisha King

Tim Collison MFIA

Melissa Lizza

Kingsley Edwards AMFIA

Daniel Longbon

Shenae Holloway

## 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. This year nine students enrolled in the Diploma. Diploma students each receive a personal tutor to complete the twelve modules of the course; ten compulsory modules and two elective modules. It is a rigorous program that is richly engaging for the students who undertake this commitment.

Tutors for this course are highly regarded fundraising professionals who are expert tutors, Fellows of FIA (FFIA), and hold the internationally recognised Certified Fund Raising Executive (CFRE) credential. They are committed to the fundraising sector and dedicated to lifelong learning and continuing professional development.

### We would like to thank our Diploma tutors

Margaret Scott FFIA CFRE

Chris Benaud FFIA CFRE

## Graduating Students Class of 2018

FIA is proud to acknowledge the achievement of the following graduates of the Diploma in Fundraising for 2018:

Rachel Claessen

Jillian Rocchi MFIA

Wendy Farrow MFIA

Angus Robilliard

Lori Kravos

# FIA Skills-Specific

## (Short Courses & Masterclasses)

FIA offered several short courses and masterclasses covering a variety of skills-specific topics support those new to the fundraising sector or for fundraisers who wanted to expand their existing skills skillset and improve their confidence as a professional fundraiser.

We would like to thank our many tutors who authored, developed and delivered courses during 2018.

### 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. This workshop was offered in four states with a total of 47 attendees.

**Thank you to our 2018 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. This workshop was offered in three states with a total of 20 attendees.

**Thank you to our 2018 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 equipped attendees with a range of strategies to maximise the potential of their online presence. It assisted attendees in improving digital activity and visibility to attract, convert and retain online donors. Digital Fundraising was offered in three states with a total of 45 attendees.

**Thank you to our 2018 tutor** Luke Edwards MFIA

### DIRECT RESPONSE 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. Direct Response Fundraising was offered in three states with a total of 21 attendees.

**Thank you to our 2018 tutor** Leo Orland FFIA CFRE

## DONOR ENGAGEMENT TO THE MAX!

Donor engagement is becoming the next big thing in fundraising due to declining second gift rates: conversions into regular giving and overall donor retention rates. This course equipped participants with an understanding on how to build a best practice donor engagement program for any type of fundraising program. This course was offered in 5 states with a total of 145 attendees.

**Thank you to our 2018 tutors** Andrew Sabatino MFIA and Marcus Blease FFIA

## FUNDRAISING STRATEGIC PLAN

This one-day course focused on the key attributes of an effective fundraising plan and students worked through the process in class to develop a workable plan for implementation after the course. This course was offered in three states and attracted 21 attendees.

**Thank you to our 2018 tutor** 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. This course was offered in three states with a total of 28 attendees.

**Thank you to our 2018 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. Gifts in Wills Masterclass was offered in four states and had a total of 40 attendees.

**Thank you to our 2018 tutor** Helen Merrick MFIA

## MAJOR GIFTS MASTERCLASS

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. This masterclass was offered in four states with a total of 49 attendees.

**Thank you to our 2018 tutors** Brian Holmes FFIA CFRE and Craige Gravestine FFIA CFRE

# Executive Education

## GOVERNANCE FOUNDATIONS FOR NOT-FOR-PROFIT DIRECTORS

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.

This intensive two-day program covered key topics on how to be more effective at the boardroom table, serve your organisation and its mission as effectively as possible.

This year, the course was held in June in Sydney and had a total of 17 attendees.

**Thank you to our 2018 tutors:** Nigel Harris MBA FFIA CFRE GAICD, Andrew Donovan FAICD, David Shortland MAICD, and Jason Masters FAICD.

## Mentoring Program

All Professional FIA members are welcome to participate in the FIA Mentoring Program. The program is suitable for both senior industry practitioners and those new to the fundraising profession.

The goal of the program is for mentors to share their wealth of professional knowledge and life experiences with their matched mentees, providing valuable insights, advice and guidance in relation to the mentee's career and goals.



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, VIC, WA and SA. Mentor Program Portfolio Holders in these states for 2018 were:

**QLD** Kim Sutton MFIA CFRE and Alex Struthers MFIA

**NSW** Julie-Anne Macintyre MFIA and Charlotte Sangster EMFIA

**VIC** Pamela Sutton-Legaud MFIA and Karen McComiskey MFIA CFRE

**WA** Anne Smith EMFIA and Bec Stott MFIA

**SA** Rebecca Miller MFIA

We would like to thank ASI for sponsoring the 2018 Mentoring Program in NSW.

# State and Territory Presenters and Sponsors 2018

## NSW PRESENTERS

Meredith Dwyer FFIA CFRE  
Karen McGrath  
Ebony Gaylor  
De'hanne Keir  
Gemma Rygate  
Daniel Bernstein MFIA  
Carmel Macmillian MFIA

Bradley Twynham  
Will Kirsop MFIA  
Emma Taylor  
Melissa Morris  
David Fudge  
Jill Arkell

## NSW SPONSORS

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BMS Group  
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Hays  
Adestra  
FundraisingForce  
HLB Mann Judd  
Thank Q  
Zuora  
Michael Page  
Donor Republic  
LemonTree  
Pareto Fundraising  
FillPak  
Active Mail  
Tone Studio

## VIC PRESENTERS

Tara Kelliher  
Alan White MFIA  
Julia Cameron  
Audrey Hii MFIA  
Peter McMullin

Karen Van Sacker  
Alex Furman MFIA  
Cath Hoban MFIA  
Stephen Mally FFIA CFRE

## VIC SPONSORS

Blackbaud  
Mackillop Family Services  
Frontstream



## QLD PRESENTERS

Ann Hutchinson  
Simone Owens  
Maree Taylor  
Naomi Lawrence  
Sandy Fuller MFIA  
Terri Sheahan EMFI CFRE  
Jacinta McLennan  
Nina Mullins  
Leanne Angel FFIA CFRE  
Fiona MacAnally MFIA  
Geoff Davey  
Heather Stott MFIA  
Andrew Pentland  
Joe Hanlon  
Dan Lalor MFIA  
Alan Le May  
Kirsty Graham MFIA  
Erin McCabe  
Julie Mullen MFIA

Erin Jones MFIA  
Jeff Buchanan  
Kelly Barrington MFIA  
Tina Hay  
Erin Jones MFIA  
Rachael Lance MFIA  
Jeanette Bayley MFIA  
Abby Clemence MFIA  
Ben Cox FFIA  
Joe Hanlon  
Kelly Harding  
Chris Stevenson  
Ruth Knight  
Adam Ruble  
Daren Musilli MFIA  
Geoff Davey  
Meredith Dwyer FFIA  
Tina Hay  
Earle Johnston MFIA CFRE MAICD

## QLD SPONSORS

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HomeMade Digital  
Clever Contacts  
Pronto Direct  
Blackbaud

Frontstream  
Direct Marketing Solutions  
Cornucopia Fundraising  
Infinity Sponsorship  
Apple Marketing Group

## WA PRESENTERS

James Garland FFIA CFRE  
Peter Leaversuch  
Heiko Plange FFIA CFRE  
Dean Pearson  
Peter Dalton FFIA CFRE  
Susan Morrow MFIA  
Ruth Mackay MFIA  
Meredith Dwyer FFIA CFRE  
Lauren McDermott MFIA  
Tori Anderson MFIA

Tim McInnis  
Hazel Grunwaldt MFIA  
Katherine Raskob  
Shaun Nannup  
Scott Guerini  
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# Awards for Excellence in Fundraising 2018

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

The following FIA members provided assistance in the first round of State Award judging. FIA thanks these members for their contribution to celebrating fundraising success.

### Donor Acquisition

Meredith Dwyer FFIA CFRE  
Nicola Stewart MFIA  
Laura Kazmirowicz MFIA  
Joanne Rogers

### Donor Renewal

Rebecca Miller MFIA  
Christine Bullivant EMFIA  
Elizabeth Davis EMFIA CFRE  
Kerren Morris MFIA

### Major Gifts

Vicki Rasmussen FFIA CFRE  
Margaret Scott FFIA CFRE  
Craig Graveston FFIA CFRE  
Karen Firestone MFIA

### Bequests/ Gifts in Wills

Ross Anderson MFIA  
Roewen Wishart FFIA CFRE  
Carol O'Carroll MFIA  
Anne Smith EMFIA

### Capital Campaigns

Kim Downes EMFIA CFRE  
Mark Quigley FFIA  
Brooke Rose MFIA  
Hazel Grunwaldt MFIA

### Special Events

Christine Anderson MFIA CFRE  
Bec Stott MFIA  
Cath Adams MFIA  
Julie-Anne Macintyre MFIA

### Special or Emergency Projects

Zoe Karkas FFIA  
Trudi Mitchell MFIA  
Ben Cox FFIA  
Leigh Cleave EMFIA CFRE

### Best Volunteer Program

Charlotte Sangster EMFIA CFRE

## 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 judged 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 thank the National Judges for their contribution to celebrating fundraising success.

Nigel Harris FFIA CFRE  
Allan Godfrey FFIA

James Garland EMFIA CFRE  
Sharon Hillman FFIA

# Awards for Excellence Winners 2018

## 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.

**2018 Winner:**

Lighthouse Foundation – *4Up Day*

### Most Outstanding Fundraising Project

This award recognises the most outstanding entry across all categories.

**2018 Winner:**

Orygen, The National Centre of Excellence in Youth Mental Health – *Orygen Capital Program*

## ORGANISATIONAL AWARDS

### Donor Acquisition

**Over \$5 million revenue:**

Peter MacCallum Cancer Foundation – *Peter Mac's Beneficiary and Donor Centric High Value Proposition*

High Commendation: The Smith Family – *Back to School*

**Under \$5 million revenue:**

NSW SES Volunteers Association – *NSW SES Volunteers Association Tax Acquisition 2017*

High Commendation: RSPCA WA – *20for20*

### Donor Renewal

**Over \$5 million revenue:**

Bush Heritage Australia – *2017 Winter Appeal: Standing together in the way of extinction*

High Commendation: National Heart Foundation of Australia – *Heart Foundation Tax Appeal 2016*

**Under \$5 million revenue:**

Lighthouse Foundation – *4Up Day*

High Commendation:

Berry Street – *Christmas "Presents" – an opportunity to help Berry Street children*

## Bequests/ Gifts in Wills

Sponsored by:

include *a charity*  
Help the work live on.

**Over \$5 million revenue:**

Cerebral Palsy Alliance – *Circle of Hands*

High Commendation: Cancer Council NSW – *Supporter Relationship Management at Scale*  
– *Cancer Council NSW's 2017 Bequest Campaign*

## Capital Campaigns

**Under \$5 million revenue:**

Orygen, The National Centre of Youth Excellence in Mental Health – *Orygen Capital Campaign*

## Major Gifts

**Over \$5 million revenue:**

Peter MacCallum Cancer Foundation – *Ethical Solicitations during a transitioning case for support*

## Special Events

**Over \$5 million revenue:**

Act for Peace – *Act for Peace Ration Challenge*

High Commendations:

CBM Australia – *Miracles Day*

Breast Cancer Network Australia – *BCNA Pink Bun Campaign*

**Under \$5 million revenue:**

High Commendation: Autism Spectrum Australia (ASPECT) – *Walk for Autism*

## Special or Emergency Projects

**Over \$5 million revenue:**

High Commendation: Act for Peace – *East Africa Emergency Appeal*

## INDIVIDUAL AWARDS

### Arthur Venn Fundraiser of the Year

Sponsored by:



Vicki Rasmussen FFIA CFRE



### Young Fundraiser of the Year

Sponsored by:



Stacy Irving MFIA (VIC)



High Commendation: Alesha Hope MFIA (NSW)

### Volunteer of the Year

Brittany Lovell – *nominated by Leukaemia Foundation (WA)*

# Awards for Excellence Finalists 2018

## ORGANISATIONAL AWARDS

### Donor Acquisition

#### Over \$5 million revenue:

- Peter MacCallum Cancer Foundation – Peter Mac’s Beneficiary and Donor Centric High Value Proposition
- The Smith Family – Back to School
- Act for Peace – Act for Peace Ration Challenge

#### Under \$5 million

- NSW SES Volunteers Association – NSW SES Volunteers Association Tax Acquisition 2017
- Christ Church Grammar School – Grow the Game
- RSPCA WA – 20for20

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### Donor Renewal

#### Over \$5 million

- Bush Heritage Australia – 2017 Winter Appeal – Standing together in the way of extinction
- National Heart Foundation – Heart Foundation Tax Appeal 2016
- Australia for UNHCR – 90 Day Retention Project

#### Under \$5 million

- Lighthouse Foundation – 4Up Day
- Berry Street – Christmas “presents” an opportunity to help Berry Street children
- ActionAid – ActionAid Xmas 2016 Appeal – Mary’s Story

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### Major Gifts

#### Over \$5 million

- Peter MacCallum Cancer Foundation – Ethical Solicitations during a transitioning case for support
- Bush Heritage Australia – Bringing our Remote Aboriginal Partnerships to our Donors

#### Under \$5 million

- Baptcare Ltd – Creating pathways for people seeking asylum

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### Bequests / Gifts in Wills

#### Over \$5 million

- Cerebral Palsy Alliance – Circle of Hands
- Cancer Council NSW – Supporter Relationship Management at Scale – Cancer Council NSW’s 2017 Bequest Campaign
- Peter MacCallum Cancer Foundation – The patient road to Bequest success
- Australian Red Cross & Flourish Digital – Wills for Life – Pass it On

#### Under \$5 million

N/A



## Capital Campaigns

### Over \$5 million

N/A

### Under \$5 million

- Orygen, The National Centre of Excellence in Youth Mental Health – Orygen Capital Program
- Ronald McDonald House Westmead – Building Love Campaign

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## Special Events

### Over \$5 million

- Act for Peace – Act for Peace Ration Challenge
- CBM Australia – Miracles Day
- Breast Cancer Network Australia – BCNA Pink Bun Campaign
- Asylum Seeker Resource Centre – ASRC World Refugee Day Telethon

### Under \$5 million

- Autism Spectrum Australia (Aspect) – Walk for Autism
- Interplast Australia and New Zealand – Turia's Everest Trek
- FSHD Global Research Foundation Ltd – 8th Annual Sydney Chocolate Ball

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## Special or Emergency Projects

### Over \$5 million

- Act for Peace – East Africa Emergency Appeal

### Under \$5 million

N/A



# Award Sponsors 2018



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## FIA National Partners 2018

FIA is proud to acknowledge the support of our 2018 National Partners.







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The Professional Body for Australian Fundraising

**Prepared by Fundraising Institute Australia**

**31 December 2018**

**PO Box 642 Chatswood NSW 2057**

**P: 1300 889 670**

**W: [www.fia.org.au](http://www.fia.org.au)**

**ABN: 51 943 541 450**

**ACN: 088 146 801**