



FIA

**Fundraising
Institute
Australia**

The Professional Body for Australian Fundraising

Annual Report 2019

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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

The latest *Australian Charities Report (2017)*,¹ produced by the Australian Charities and not-for-profits Commission, found there are now more than 57,600 registered charities in Australia. Religious activity was again the most dominant charitable activity, followed by education and social services work.

Charities had a total revenue of \$146.1 billion (up from \$143 billion in 2016) and government grants as a revenue source increased by \$7 billion. Donations and gifts in wills as a revenue source declined slightly from 2016, but Australians still proved wonderfully generous, donating or bequeathing \$9.9 billion in 2017.

Charities employed 1.26 million people (10% of the population) in 2017, slightly down from 1.3 million paid staff in 2016. Meanwhile, the number of people volunteering for a registered charity increased to 3.3 million, up from 2.9 million in 2016.

The annual examination of the latest tax data by the Australian Centre for Philanthropy and Nonprofit Studies (ACPNS),² at Queensland University of Technology, recorded a 21.8% increase in donations from the previous year with a total of \$3.5 billion donated in 2016-17. However, the percentage of Australian taxpayers making deductible gifts has been declining for several years, decreasing from 33.40% in 2015-16 to 32.60% in 2016-17. The average tax-deductible gift amount was \$770.

But Australia was once again highlighted as one of the world's most generous nations. The 10th annual Charities Aid Foundation's *World Giving Index*³ ranked Australia fourth behind the United States, Myanmar and New Zealand. While giving did fluctuate over the decade, Australia has offered relatively stable levels of donating, volunteering and willingness to help a stranger, the criteria the annual Index examines.

McCrindle Research's *2019 Australian Community Trends Report*,⁴ also deduced that charitable giving remains robust in Australia, with five in six Australians (83%) giving to charities and non-profit organisations. The research found that Australian donors are increasingly "need responders" with two in five (40%) most likely to give when they learn about a need or issue.

Three in five Australian givers (61%) prefer to support charitable organisations with a local or national focus. Children's charities are the top cause for Australian givers (47%), followed by animal welfare/wildlife support (42%) and medical and cancer research (38%).

Positively, the McCrindle report discovered three in five Australian donors (61%) believe the charities they support are extremely or very trustworthy. However, those trust levels decrease when looking at non-profits (37%), the sector as a whole (29%) and social enterprises (23%). Similarly, the *2019 Edelman Trust Barometer*⁵, a score that measures the average per cent of trust in NGOs, business, government and the media, found faith in NGOs rose eight points to 56%. Thus, charities moved back into the trusted territory after being in the 'distrust' camp for a year.

The McCrindle report also found nearly seven in 10 givers (69%) look for transparent reporting of administration costs from charities. Australians want to support an organisation with a proven track

¹ Australian Charities Report 2017, Australian Charities and Not-for-profits Commission

² 2016-17 examination of tax-deductible donations made by individual Australian taxpayers, Australian Centre for Philanthropy and Nonprofit Studies, Queensland University of Technology

³ 2019 World Giving Index, The Charities Aid Foundation

⁴ 2019 Australian Community Trends Report, McCrindle Research

⁵ 2019 Edelman Trust Barometer

record (68%) that provides a detailed breakdown of where donations are allocated (67%) and the impact they are having (62%).

The Pareto Fundraising State of the Donation 2019,⁶ which charts the changes in donor giving, found that 80% of the population (four in five Australians) gives money to charity. Those who are happy to give money are also pleased to donate goods, volunteer or undertake personal fundraising for their favourite cause.

When it comes to just giving money, the percentage of people donating has continued to drop in recent years, but those who are still giving are giving more.

The baby boomers are leading the giving charge as they are in their prime charitable giving years and have the highest net worth. But Generation Xers (all 4.8 million of them) will be the ones to watch as they are now entering their prime giving years.

However, the *Australian Community Trends Report*⁷ suggested that charities must also look to engage Generation Y and Z as they now comprise the majority of the workforce, outnumbering Generation X and the baby boomers for the first time.

As for how specific fundraising methods are faring, the Pareto report found regular giving leads the way with face-to-face fundraising the most robust way to find high volume, steady support. Its income has grown a staggering 172% in the last decade. At the same time, gifts in wills have increased by 126%. They are now worth over \$350 million to Pareto's benchmarking participants each year. The average bequest is \$52,000.

While donating by direct mail has declined by 14% in the past 10 years, it is still effective and spurs online giving and the largest pool of bequest prospects. While most people say they dislike telephone fundraising, one-quarter of Australians donated when asked by a telephone fundraiser. The telephone also remains a suitable method for thanking, acquiring, re-activating and upgrading donors.

Finally, digital fundraising is booming, rising 500% over the past decade. Facebook inspires 62% of donors to give while Twitter draws 15% and Instagram 10%.

But Australian non-profits are still not quite ready on the digital front. Nonprofit Tech for Good's *The Global NGO Technology Report 2019*,⁸ which provides insight into how NGOs use technology to engage supporters, found that while 95% of Australian not-for-profits have a website, just 62% can take donations online. In contrast, in the United States and Canada, 85% of charities can accept donations through their websites.

While 77% of Australian non-profit organisations send email updates to supporters and 43% send fundraising emails, only 47% use CRM software to track donations and manage communications with their supporters. The tech report also found that when it comes to emerging technology, blockchain and machine learning are the least understood by Australian non-profits, although they say they have a good grasp of cloud computing, artificial intelligence and virtual reality.

Interestingly, Australia is one of the few places where print newsletters and fundraising appeals made the top 10 list of the most effective communication and fundraising tools used by NGOs. Fifty-seven per cent of respondents said print tools are highly useful fundraising and communication techniques (compared to 26% globally).

Overall, it is truly the continued generosity of Australians and the hard work of charitable organisations and their fundraisers who make Australia and the world at large, a brighter place.

⁶ State of the Donation 2019, Pareto Fundraising

⁷ 2019 Australian Community Trends Report, McCrindle Research

⁸ The Global NGO Technology Report 2019, Nonprofit Tech for Good

Chair's Report

I'm proud to present Fundraising Institute Australia's annual report for 2019. We took great strides this year in pursuit of a stronger sector for our members to work in and the evolution of our services to the membership.



I feel I can safely say the national board of directors have never been more certain about FIA's future. FIA is the peak body for the charitable fundraising sector (which raised \$9.9 billion according to the most recent statistics) and represents charities of all sizes as well as professionals and suppliers to the sector. In 2019, organisational membership grew, we developed even stronger relationships with regulators and government representatives around Australia, enhanced our presence in the media, refined our professional development program and delivered an exceptional conference and state-based events.

I thank Katherine Raskob, FIA chief executive, for her dedication to the task at hand. She has held countless member meetings to learn how we can improve the benefits we offer to members. Some of these meetings led to the development of a supplier category of membership which we will look to implement in 2020. Katherine has also been working with our new professional identity committee on a mapping exercise to foster a better professional identity for fundraisers, plotting existing FIA offerings against a matrix of critical skills and knowledge.

Volunteers are the face of FIA in the states and make it possible for us to have an impact. Without them, we could not fulfil our mission to provide networking and educational opportunities to our members across Australia. Our 200+ volunteers do a magnificent job in organising and hosting events and forums around the country. I think we are working together across the states and head office better than ever. We will continue to strive toward a strong, united national structure for the benefit of our members. Thank you to all of our voluntary committees.

In the second year of our current strategic plan (2018-20), we have also forged excellent relationships with government officials, ensuring we continue to play a prominent role in shaping the regulatory landscape.

One of the greatest steps taken by FIA in recent years has been our self-regulatory Code which has now been in effect, in its current form, for over two years. Efforts to promote member compliance with the Code have been ongoing, under the stewardship of the FIA Code Authority. At the time of writing, more than 3,000 fundraisers and suppliers had undertaken their mandatory Code training, which to me demonstrates that members endorse the Code and are in full support of more sustainable and professional practice.

Our monitoring program to validate member compliance with the Code also continues to progress across several fundraising practices. This year our 'mystery shoppers' conducted five rounds of testing member responses on areas like treatment of vulnerable donors, donor care and communication preferences. We have seen pleasing results overall, and where there has been the need to improve individual member practice, we have informed members so they can advance in best fundraising practice.

It is now more essential than ever to focus on good governance, best practice and compliance with the FIA Code. By taking an educative approach to Code monitoring and ensuring our members demonstrate ethical behaviour, we will continue to bolster regulator and donor confidence and hopefully minimise the prospect of reactive legislation imposed on the sector.

While the Code exists to guide members towards best practice, the FIA National Awards for Excellence in Fundraising are always a pleasant reminder of the incredible campaigns, teamwork and individual accomplishments of fundraisers and volunteers. In 2019, we undertook a significant revamp of the awards to ensure they remain relevant for our members.

The 2020 FIA Awards will herald a new era in our awards program, and we look forward to the celebration. Thanks to the generous sponsorship of Mondial and Precision Fundraising, our awards are now free to enter, and the changes have been met with an overwhelmingly positive response and the more than doubling of the number of entries.

February will also see the exciting relaunch of the FIA Foundation, which has existed in the background for years and will emerge again as a vital element of FIA's future. The Foundation raises funds to provide scholarships and research for our members. We are currently writing a new business plan for the Foundation's work and will present this at FIA Conference 2020.

This is my last report as I will pass the role of chair to Meredith Dwyer FFIA CFRE from February 2020. I have great respect for Meredith, and I can't think of anyone better to continue the positive trajectory of FIA. Meredith has had so many years of distinguished service to FIA that she will need little warm-up, she will hit the ground running as chair and be a huge asset to the Institute and the membership. I want to thank Meredith for taking on the leadership and wish her the best for the years ahead.

I also wish to thank the following fundraisers who have recently stepped down from the board: Elizabeth Davis EMFIA CFRE; Ben Holgate MFIA, and Warwick Hay MFIA. Thank you for your service and valuable contributions to FIA and the fundraising community.

In closing, I want to thank the FIA staff, who do an enormous amount of work to ensure that FIA provides value to members. The expertise, enthusiasm and professionalism of the head office team are vital to FIA's success as the peak body for professional fundraisers in Australia. You continue to make it a pleasure for everyone to serve FIA and be served by FIA. Keep up the good work.

James Garland FFIA
CHAIR OF THE FIA BOARD

Chief Executive's Report

I'm pleased to present my second annual report for Fundraising Institute Australia. In 2019, I crisscrossed the country to meet hundreds of members, attend FIA events, deliver presentations to boards and other forums, and consult with government officials and regulators at the state, territory and Commonwealth levels. I've been warmly welcomed everywhere and received positive feedback about FIA and the work we are doing.



On the member front, meeting with so many fundraisers and hearing about the valuable programs they enable to support communities across Australia and overseas, was genuinely inspiring. Thank you to everyone who took the time to meet with me.

FIA continues to strengthen its position as the peak body that protects, promotes and educates the professional fundraising sector, and we are grateful for our members' continued support and participation. In 2019, we doubled the number of organisational members and made inroads with new member acquisition, renewals and reactivations.

This year, we are on track to achieve the FIA Code self-regulatory goals as set out in our current strategic plan (2018-20), with strong acceptance and uptake of Code training by the membership (3,000 registrations/completions to date). We also invested heavily in our mystery shopping of members to ensure they were complying with the FIA Code. I have spoken to more than 200 CEOs and heads of fundraising to explain the results of the mystery shopping, including how their organisation fared. Overwhelmingly, they welcomed this feedback which has helped with both donor care and risk management, ensuring the continued sustainability of our sector.

Our weekly jobs bulletin now reaches 7,500 subscribers, proof that advertisers and job-seekers appreciate our reach in the fundraising community.

In 2019, we introduced our new Essential Member Update roadshow to provide members with vital sector information, including fundraising trends, government and regulatory issues, privacy and data challenges, and results from the FIA Code monitoring program. We had nearly 300 attendees in five states and will offer these updates again in 2020, thanks to the incredibly positive feedback we received.

There was a significant regulatory achievement in February when the Senate Select Committee into Charitable Fundraising in the 21st Century accepted our recommendation for a two-year fundraising reform timetable to harmonise state/territory regulations and reduce red tape for fundraisers. Throughout 2019, we progressed steadily with state and Commonwealth ministers around Australia, and we were particularly pleased that several jurisdictions including New South Wales, South Australia and the Australian Capital Territory were open to our proposals.

This year, FIA established a "brains trust" which includes heads of fundraising from organisations fundraising over \$2 million. The group is working with FIA leadership to advise the member body and manage current issues and challenges like the skills shortage. We also created a supplier focus and advisory group to discuss matters pertinent to sector suppliers.

We developed a comprehensive media strategy, and we were responsive to all media enquiries that came through our office, with the result that we generated several positive stories in mainstream and trade media about fundraising.

On the education front, there were some notable achievements. We revamped the FIA mentoring program, resulting in 180 participants (mentors and mentees) compared to just 28 participants last year. This program is now starting to reach its potential as a significant member benefit.

We introduced five new short courses, with two of them – Donor Journey Mapping and Navigating the Fundraising Regulatory Environment – exceeding enrolment expectations.

We also added to our online learning slate with Gifts in Wills, which was well received by busy fundraisers looking to study anytime, anywhere. On the tutorial side of things, we broadened our tutor pool in 2019, and I thank our talented instructors who continue to deliver quality education to fundraisers on behalf of FIA.

FIA Conference was once again the crown in the fundraising calendar. The 2019 event attracted 1,000 delegates, speakers and exhibitors to Melbourne for three days of professional development delivered by overseas and local experts. The quality program was a reflection of the hard work undertaken by the 2019 program committee capably led by The Shepherd Centre's Nicola Norris and our conference and events team.

Across the country, our network of seven state and territory committees did so much to showcase our national footprint, with our volunteers organising an incredible variety of networking and educational events. Highlights included our first-ever fundraising forum in Tasmania, held in September, which attracted 50 people and the second Northern Territory not for profit forum, in partnership with Volunteering SA/NT, which drew 52 fundraisers in April.

Our long-term strategy to encourage more Australians to consider gifts in wills continued with nearly 90 charities participating in the Include a Charity 2019 campaign. The campaign reached potential bequestors through successful advertising and PR aimed at the 55+ audience. All up, there were 108 print and radio interviews, plus our Channel 9 Today Extra advertorial.

To increase sector engagement, we held a series of well-attended seminars in five cities with UK-based legacy expert, Meg Abdy. Meg discussed new research she had conducted on the Australian gifts in wills market. Include a Charity also organised regular training to bring the latest trends and information to gifts in wills fundraisers. I'm confident that with this social change campaign we will normalise bequest giving in Australia.

Of course, there are always challenges in a small not-for-profit. Keeping up to date with technology is just one of them, and we can see that we need to address our lack of integrated and sophisticated systems next year. So, we are pushing ahead with technology improvements to streamline our business processes and enhance your member experience.

We have a change at the top as James Garland FFIA steps down after completing his two-year term as chair of the FIA Board of Directors. I have appreciated James' constant support, and I'm grateful he will continue to serve on the board to support the work of FIA. I also warmly congratulate Meredith Dwyer FFIA CFRE, who has been appointed chair beginning February 2020, and thank all FIA directors for their valuable advice and guidance during the year.

Our work would not be possible without the generosity of our national sponsors, Database Consultants Australia (DCA) and the Ive Group, as well as the many other commercial partners who generously support our events. I also thank the 200+ fabulous volunteers across Australia who organise local member events or sit on committees and special interest groups. Last, but not least, I salute my incredibly talented and dedicated staff at the Chatswood office who do so much for our members. A heartfelt thanks to all.

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 2019 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 with FIA becoming 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 few years leading up to 2017 saw FIA build its reserves, the plan for the period from 2017-2019 was to invest in the development of resources and staffing to achieve the goals set out in the plan with a return to a balanced budget set for 2020 and a return to surplus in 2021.

The result for 2019 is a deficit of (\$178,237), well within the expectations of the strategic plan and in line with the budget and forecasts for 2019. The investments made and results achieved over the last three years of this current strategic plan have set FIA up for a return to a break-even position in 2020.

FIA has successfully embedded the Code course as a baseline expectation within the fundraising sector with over 3,300 participants to date and FIA's training, networking and educational offerings achieved over 6,100 attendees this 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

In line with the major revision of the FIA Code, we have also committed resources to the development of our monitoring program to ensure member compliance with the Code. FIA has taken an educative role in reporting outcomes to members resulting in over 200 conversations with CEOs and heads of fundraising. This uptake and acceptance of the Code is a major success for FIA with the development of a 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.

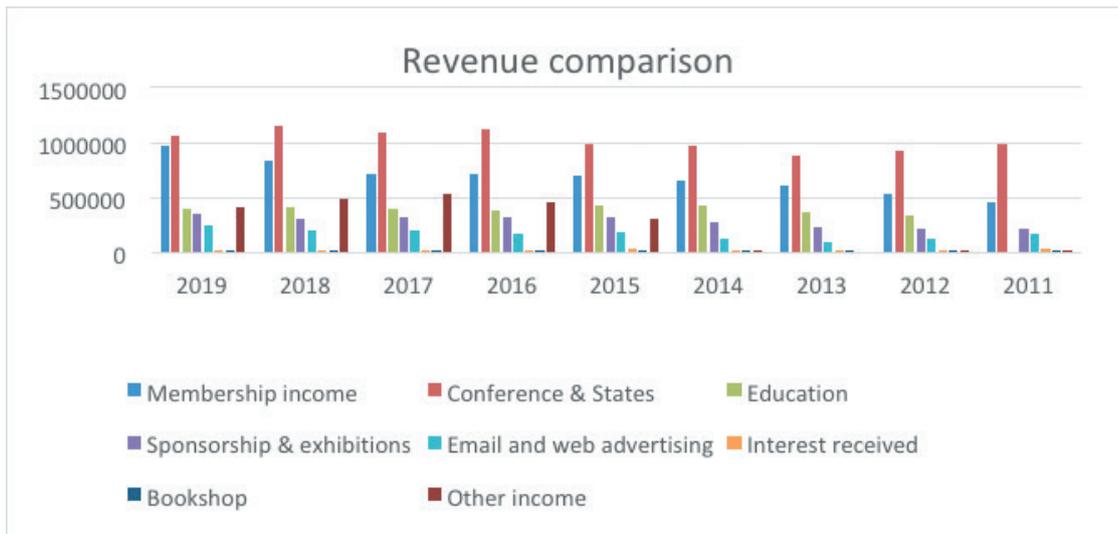
At the same time as achieving these strategic outcomes, FIA has been working towards the fiscal outcomes of growing income from membership. This has been achieved in 2019 with a 31% growth in the number of member organisations and a growth of 11% in professional member numbers resulting in an increase of nearly 17% in membership income. This growth is a significant achievement and is testament to the work undertaken in both member engagement and Code redevelopment.

Significant development work has also gone into our portfolio of online offerings with a gifts in wills essentials course now added to the mix and further courses planned; this assists us to achieve our longer term goals of offering both online and in class opportunities to meet the market.

INCOME

Income for the year was \$3.4M (\$6k down on 2018 results). A 17% increase in membership income combined with another successful conference and awards night in February 2019 and continued growth from advertising services acted to soften the impact of a slowdown in general educational attendance numbers. It should be noted that income from contributions to the Include a Charity campaign is only applied against expenses from this campaign which effectively ‘ring fences’ this income.

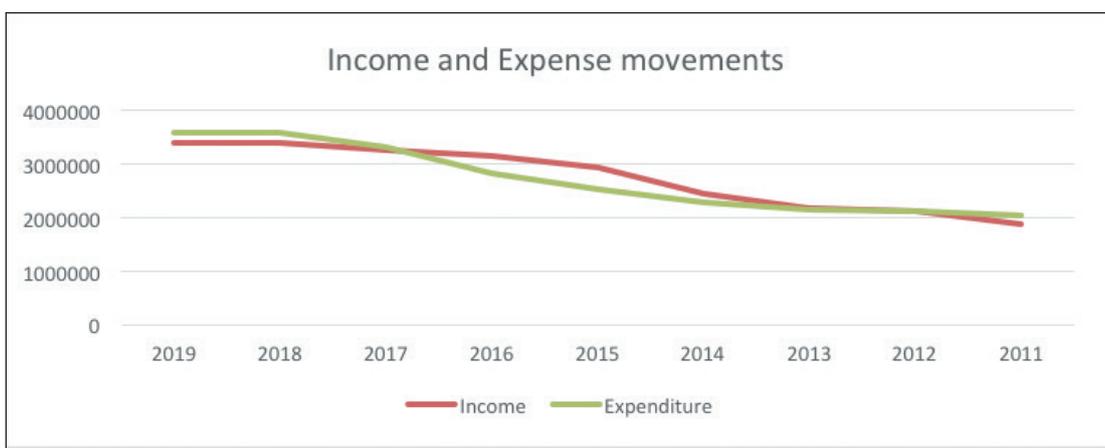
The chart below shows the income contribution from each revenue stream highlighting the weight of each key area of the business.



EXPENSES

Total expenses for the year amounted to \$3.6M (\$10k decrease on 2018) and 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 2011 to 2019.



OUR FINANCIAL POSITION

The 2019 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 FIA 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 inflow of \$249k, increasing our cash position to \$2.2M at year end.

FINANCE AND AUDIT COMMITTEE

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

James Garland FFIA

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 2019.

Trudi Mitchell FFIA

HONORARY TREASURER

Regulatory Report 2019

REGULATORY REFORM

SENATE INQUIRY INTO CHARITY FUNDRAISING IN THE 21ST CENTURY ADOPTS FIA APPROACH

The Senate Select Committee on Charity Fundraising in the 21st Century accepted a key recommendation of FIA to establish a two-year timetable for fundraising reform. It also agreed with FIA's approach to seeking harmonisation among state and territory fundraising regulations as a way forward. In its report, released 14 February, it said: "The committee considers that the Commonwealth, State and Territory governments should commit to developing a nationally consistent model for the regulation of charitable and not-for-profit fundraising within a time limit of two years" adding "...any solution will necessarily involve the input and cooperation of state and territory governments. Even minor amendments to the Australian Consumer Law...require ratification by the states and territories." FIA welcomed the report findings and pledged to continue to work with all stakeholders to achieve these long overdue reforms.

FIA'S 5 POINT PLAN FOR FUNDRAISING REFORM

Following the Senate Select Committee's adoption of FIA's proposal for a two-year timetable for fundraising reform, FIA proposed a 5 Point Plan to achieve the Senate's timetable. FIA's approach would enable fundraisers to satisfy their permit/licensing requirements by providing the necessary information to the ACNC which would forward the data to the states for registration purposes. This model, if adopted by all states, would facilitate a one-stop fundraising application process, cutting out layers of red-tape.

PROGRESS IN NEW SOUTH WALES

NSW Better Regulation Minister Matt Kean, addressed an FIA event in February, in which he reported on progress with the next stage of amendments to Charitable Fundraising legislation, regulation and guidelines.

Following the state election, the CEO met with the new Minister, Kevin Anderson, who has been closely involved with the Salvation Army and Ronald MacDonald House in his electorate of Tamworth in northern NSW. She urged him to push ahead with the reform program, the most advanced in Australia, and to take a lead in encouraging other jurisdictions to streamline their licensing and reporting requirements to minimize paperwork and duplication.

NSW FUNDRAISING LAW AMENDMENTS

In April the CEO met with officials from the NSW Department of Better Regulation to discuss plans for further fundraising regulatory amendments to provide for renewable 5-year licenses, which would be a significant red tape reduction for fundraisers. FIA welcomed the initiative to reduce red tape by building the Standard Conditions for fundraising into the Act, thereby eliminating the need to fill out forms for each campaign. FIA also supported measures aimed at aligning financial and reporting requirements with the ACNC, noting the effort to align with other states (in particular Victoria) in regard to licensing conditions and enforcement provisions. A further change aligned the Act with the Australian Consumer Law on false, misleading or deceptive conduct.

VICTORIA JOINS THE FUNDRAISING REFORM MOVEMENT

FIA made two submissions to Consumer Affairs Victoria in response to its review of fundraising regulations. In its submissions, FIA urged CAV to join the effort to harmonise, citing the recommendations from the recent Senate Inquiry.

In her Statement of Intentions for 2019-21, Consumer Affairs Victoria Minister the Hon Marlene Kairouz committed to: “Reduce red tape and duplicated reporting requirements for registered fundraisers.” This has taken the form of amendments to Victoria’s Fundraising Act so that a charitable entity registered with the ACNC will, on giving notice to the Director of CAV that they intend to fundraise in Victoria, be deemed to be registered as a fundraiser under the Act. They will also not need to report annually to CAV as long as they comply with their annual reporting obligations to the ACNC. These provisions are modelled on those already in effect in South Australia.

SOUTH AUSTRALIA AND THE ACT PROVIDE TEMPLATE TO CUT RED TAPE

South Australia and the ACT have utilised the ACNC to reduce red tape. Charities registered with the ACNC no longer have to apply for a licence to fundraise or to report on every appeal and campaign in these jurisdictions. In a meeting with the SA Commissioner for Consumer and Business Services, the CEO sought support to assist FIA and other states to achieve a similar outcome.

ENGAGING WITH THE NEW FEDERAL CHARITIES MINISTER

In mid-August the CEO had a very productive meeting with Commonwealth Assistant Minister for Charities, the Hon Zed Seselja. They discussed the timetable for fundraising reform and the Minister was very open to FIA’s suggestions, especially around providing a ‘one-stop-shop’ for registering fundraising campaigns.

MEMBER ROUNDTABLES WITH THE MINISTER

In late September, FIA organised two member roundtables in Sydney and Canberra with Minister Seselja to discuss ideas for red tape reform. He asked for evidence to support the case for Commonwealth leadership on red tape reduction. Our members rose to the occasion with many stories about the burden and expense they faced through duplicative licensing and reporting requirements.

REGULATORY TOOLS AND SUPPORT FOR MEMBERS

ROI PRACTICE NOTE

FIA provided guidance to members on measuring and assessing their fundraising performance. The practice note offers information on the key metrics that should be monitored.

ROI CALCULATOR FOR REGULAR GIVING PROGRAMS

Thanks to the contribution of long time FIA member Kerren Morris of Pareto Fundraising/Ive Group, FIA was able to provide members with a simple calculator to help with the measurement and reporting of their regular giving programs.

PRIVACY MANUAL RELEASED DURING PRIVACY AWARENESS WEEK

With help from the team at law firm Minter Ellison in Melbourne, FIA released a new and updated Privacy Manual for Fundraisers. The 60-page manual is specially geared towards the needs of professional fundraisers and includes a section on the unique privacy challenges presented by social media.

FIA RECOGNISED AS A SUPPORTER OF PRIVACY AWARENESS WEEK

FIA became a recognised ‘supporter’ of Privacy Awareness Week, held between 12-18 May. The event served as an important reminder for fundraisers and their suppliers to consider their privacy priorities and how they are meeting their obligations year round. FIA used the occasion to launch its revised Member Privacy Manual.

WEBINAR ON THE FIA CODE

On 26 September the CEO and executive manager Code and regulatory affairs conducted a webinar on effective self-regulation in fundraising, including a discussion of the results of our mystery shopping of members to test their compliance with the FIA Code. Member attendance was the highest for any webinar by FIA, an encouraging sign of member interest in self-regulation.

GUIDANCE ON CROWDFUNDING

In March FIA provided comments on amended NSW Guidelines for fundraisers. The revised Guidelines were released later in the year. The new Guidelines are a good example of the fundraising reform process in action because they slash more than 150 pages of out-of-date and overlapping red tape from the NSW regulatory burden.

The guidance on crowdfunding makes it clear that this increasingly popular fundraising channel falls within the regulatory framework. It states: “If a person raising funds for a charitable purpose accepts money from someone living in NSW, it must abide by all relevant laws, regulations and authority conditions (even where the charity is based or registered outside of NSW). This includes where money is accepted via an online platform.”

SUPPLY PRACTICE NOTE

FIA published a Practice Note: Fundraising Supply Chain Governance which reminds members to meet the requirements of all applicable laws and regulations, including workplace laws, and to ensure all relevant parties in a fundraising supply chain are aware of the member’s obligations under the FIA Code.

SUPPLY CHAIN GOVERNANCE TOOLS

Along with the practice note, members received a template Supplier Conduct Policy and a Supplier Responsibility Standards Statement for use in their contractual relationships with suppliers.

SUPPORT FOR ETHICS AWARENESS MONTH

October was Ethics Awareness Month, a new, worldwide initiative spearheaded by our North American-based sister organisation, the Association of Fundraising Professionals (AFP). FIA participated by promoting member awareness of its Code and practice notes that address many of

the ethical dilemmas fundraisers encounter in their work such as how to deal with people in vulnerable circumstances, how beneficiaries are portrayed in fundraising appeals, and ensuring ethical behaviour in supply chains. We also promoted our training on ethical decision-making through our online Code course, and member-only library with a variety of titles on ethical fundraising.

While in London for the Institute of Fundraising's annual convention, the CEO participated in a video with IOF Chief Executive Peter Lewis and President/Chief Executive Mike Geiger of the AFP discussing the importance of Ethics Awareness Month and our various initiatives to promote best practice, including our codes and guidelines.

REGULATORY CHALLENGES

DIGITAL PLATFORM INQUIRY FORESHADOWS CHANGES TO PRIVACY LAWS

The Government's inquiry into digital platforms evolved into a much broader examination of the adequacy of Australia's privacy laws in the digital era.

Instead of limiting itself to addressing the behaviours of Google and Facebook, which had sparked the inquiry, the ACCC in its final report recommended overall changes to Australia's privacy laws. Ironically, this would have minimal effects on their intended targets, but would have a considerable impact on charities, including ones that earn less than \$3 million per year, the threshold for compliance with the Privacy Act.

In its submission, FIA articulated the likely impact of the proposed amendments on the ability of fundraisers to contact potential and existing donors, as it would be similar to that currently experienced by charities in Europe under its General Data Protection Regulation (GDPR). Many Australian charities are concerned, as they have close links with their sister organisations in Europe where introduction of the GPDR last year has had a depressing effect on the sector.

FIA recommended that the Australian Privacy Principles be left as they are for charities and not-for-profits as the red-tape-imposing recommendations of the report have failed to adequately take into account the impact on society if charities are discouraged from reaching out to new donors.

PRIVATE MEMBERS BILL THREATENS TELEPHONE FUNDRAISING

A Private Member's Bill was introduced into the Federal Parliament in February that would have brought calls from charities within the scope of the Do Not Call Register Act. The Bill, sponsored by South Australian Senator Stirling Griff, was shelved when the Federal election was called in May.

ACMA FLAGS AN END TO DNC EXEMPTION

An Australian Communications and Media Authority (ACMA) report to the Minister of Communications put forward the option of eliminating the public interest exemption for charities to the Do Not Call Register and introducing "a universal 'unsubscribe' or 'opt-out' function, to allow consumers to request no repeat contact from an entity."

In a letter to the minister, FIA strongly disputed the ACMA-commissioned consumer research which purportedly shows consumer dissatisfaction with unsolicited calls from these exempt entities, particularly charities. This qualitative study based on focus groups stands in sharp contrast to the ACMA's own data which found complaints had dropped by 50 per cent from about 800 to fewer than 400 and that charities remain a small fraction (1.4%) of total complaints.

SUPPORT FOR ACMA PUSH TO STOP SCAM CALLS

FIA supported a campaign by the telecommunications regulator to address scam telephone calls. The growing volume and sophistication of these scams is undermining consumer trust in the telephone, which impacts its effectiveness as a fundraising channel. The project looked at what can be done to disrupt scam call activity.

FAIR WORK OMBUDSMAN INQUIRY CONCLUDES

On 21 August the CEO met with officials at the Fair Work Ombudsman to discuss the findings of the Charity Collections Inquiry. This inquiry examined the use of labour by charities to solicit donations in a three-month period in 2017. The FWO audited 15 charities, including several FIA members, to see if their supply chain arrangements met obligations under Commonwealth workplace laws.

The FWO determined that, in this instance, there is no evidence of any contraventions or poor practice by FIA members. However, members were warned to remain vigilant and always adhere to best practice in supply chain arrangements. FIA developed new resources to help charities improve supply chain management and understand and comply with workplace laws.

LOBBYING THE BANKS ON PAYMENT SYSTEMS

In February the CEO wrote to her counterpart at the Australian Banking Association about large spikes in donor attrition because of unanticipated changes by banks and credit card companies to their automated payment systems and terms of service. Such changes appear to have been implemented without regard for their impact on charities' regular giving programs via ongoing credit card payments.

The CEO asked the ABA to consider the importance of charities' regular giving programs via ongoing credit card payments in any changes their members make to credit card agreements. She also requested banks to urge customers to contact the charities to whom they donate to update their details.

DEFENCE OF CHEQUES AS A PAYMENT METHOD

FIA made a strong submission defending cheques as a payment method, following moves from the financial services sector to phase out this important donation channel. In our submission to the Australian Payments Council on the future of payment systems in Australia, we urged the banks and other financial services organisations to consult further with charities or risk serious harm to charitable giving.

Phasing out cheques puts millions of dollars' worth of donations at risk, especially from older Australians who are the most generous donor group and often prefer to send cheques rather than use digital payment methods.

In a member survey FIA conducted in February, 93.3 per cent of respondents said their charity would be detrimentally affected if cheques were no longer available as a payment method.

INPUT TO AUDIT OF THE ACNC'S REGULATION OF CHARITIES

FIA participated in the Australian National Office of Audit on the effectiveness of the ACNC's regulation of charities. Our comments focused on the ACNC's responsibilities for reducing regulatory burden, noting some recent progress in this area. Nevertheless, establishment of the

ACNC and subsequent introduction of the Annual Information Statement substantially increased the regulatory burden on charities by adding an additional Commonwealth reporting requirement on top of pre-existing state and territory reporting for charitable fundraising/collection.

PRESSURE ON POSTAL RATES

Having received notice that Australia Post is increasing prices for charity mail, FIA joined with a coalition of other industry voices representing large volume mailers to oppose the increases, arguing that ongoing price increases by Australia Post to counter loss of revenue is unsustainable as a business strategy. Volumes are at risk of accelerated decline due to price increases that are well above inflation. FIA argued that what is needed is a partnership between Australia Post and its business customers on strategies to stabilise volumes.

The timing of the price increases did not recognise the lead times charities need for planning and budgeting. Implementing price increases across an October/January timeframe catches most charities in the midst of their financial year, leaving them unable to mitigate these price increases and resulting in decisions to cancel campaigns, thus further impacting mail volumes as well as income to charities.

Self Regulation

ABOUT THE FIA CODE

The FIA Code is a voluntary, self-regulatory code of conduct for fundraising in Australia. It does not replace or override any law but aims to raise standards of ethical conduct across the sector by going beyond the requirements of government regulation. Its content is informed by the International Statement of Ethical Principles in Fundraising. The Code applies to all FIA members and adherence to it is a requirement of membership.

The Code, in its current form, was launched in 2016 following a comprehensive review of sector sustainability. The review resulted in important reforms to protect vulnerable donors, to reduce the risk of over-communicating with donors and to improve governance and supply chain accountability, among other changes. Training in Code compliance by all fundraisers became mandatory for members. Monitoring of compliance is conducted through complaints handling and mystery shopping. An independent Code Authority oversees all aspects of Code administration.

ABOUT THE CODE AUTHORITY

The Code Authority proactively monitors fundraising activities of FIA members, ensures that Code complaints and appeals are handled in a prompt, fair and equitable manner, promotes Code awareness through training, and makes recommendations to the FIA Board for improvements to sector self-regulation from time to time.

It is independently chaired by former Senator the Hon Ursula Stephens, and members include: Jennifer Doubell, Executive Director Peter MacCallum Cancer Foundation; Ben Cox, CEO, Gold Coast Hospital Foundation; donor/consumer representative Christopher Zinn; Ashley Rose, CEO of Mondial Fundraising Communications, and Roewen Wishart (CFRE) of Xponential. Members of the Code Authority are chosen by the FIA Board for their stature in the fundraising community and their ability to adjudicate independently in the interest of upholding the values embodied in the Code.

The Code Authority has a variety of options available in cases where a member has been found in breach, ranging from requiring the member to undertake Code training, make an apology, or conduct other remedial action to ensure the breach does not recur. In extreme cases, the Authority can make a recommendation to the FIA Board that the member be suspended or expelled from membership.

CODE COMPLIANCE MONITORING

As part of its role in administering the Code, the Code Authority commissions third party monitoring of member compliance. Techniques include mystery shopping in which monitors pose as donors.

In 2019, monitoring focused on fundraiser data management and donor care, including treatment of people in vulnerable circumstances. Donations were made to a random sample of FIA member charities by mail, website and telephone in the name of a mystery shopper with unique contact details, allowing for all subsequent contacts to be linked to the initial transaction. All contacts and information sent on behalf of the charity were tracked against this initial transaction.

Transcripts of telephone conversations, print materials received, electronic messages, and any other communication were noted. The main aim of monitoring is to alert members to non-compliance before it becomes a serious or systemic issue leading to real harm. Members found in breach are given the opportunity to correct the behaviour before sanctions are considered. A secondary aim of monitoring is to inform FIA's training and professional development program requirements.

MONITORING ACTIVITY

During the year, the Code monitor completed five rounds of mystery shopping involving about 150 members and focusing on how members respond to requests from donors to opt out from fundraising communications as well as how they treated people in vulnerable circumstances. Areas for improvement were identified and included:

- A small number of charities not able to respond to opt out requests.
- A lag between submission of an opt out request and some charities' ability to process this before planned communications are sent, particularly in the case of email where lead times are shorter than for traditional direct mail.
- The size, positioning and prominence of opt out options for mail and email communications being easier to find or prominent as recommended by the relevant Practice Note.
- Some opt out processes offered only a partial solution for a donor wishing to remove themselves from all fundraising communications – examples being where an “unsubscribe” button on an email only removes the donor from a specific communication list – for example a newsletter, while retaining them on a range of other lists each requiring individual opt outs which is challenging for charities who do not have preference centre options.
- Charities whose staff accepted a donation from the mystery shopper posing as a person in vulnerable circumstances were provided guidance for their fundraising staff on how to identify such donors and reminded of their obligation under the Code not to accept donations in circumstances where the person lacks capacity to make an informed decision to donate.

In communicating these findings to members, it was noted that all charities gave assurances that they are striving for best-practice donor care, including respecting donor requests to opt out from future appeals. The Code Authority and the FIA Board noted the positive response from all members, including strong support for the work of the Code Authority and mystery shopping in continually lifting standards in the fundraising sector.

HELP TO IDENTIFY PEOPLE IN VULNERABLE CIRCUMSTANCES

In Q2 FIA developed a postcard for use by members containing “at a glance” tips on how to identify and deal with donors in vulnerable circumstances.

Donors in Vulnerable Circumstances
Tips from Fundraising Institute Australia

<p>How to spot a donor in potentially vulnerable circumstances:</p> <ul style="list-style-type: none"><input type="checkbox"/> Struggles to understand your ask or continually asks for information to be repeated.<input type="checkbox"/> Repeats questions such as 'who are you?' or 'what do you want?'<input type="checkbox"/> Wanders off topic or gives irrational, confused or erratic responses.<input type="checkbox"/> Displays signs of forgetfulness or takes a long time to answer.<input type="checkbox"/> Says 'yes' or 'no' at times when it is clear they have not understood.<input type="checkbox"/> Indicates they feel they shouldn't be donating.<input type="checkbox"/> Suggests they do not manage their finances/that someone else manages their affairs.	<p>How to respond to a donor in potentially vulnerable circumstances:</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Use clear language, avoiding words and phrases that may be hard to understand (but avoid shouting).<input checked="" type="checkbox"/> Repeat information if necessary. Be patient, do not rush or pressure the person.<input checked="" type="checkbox"/> Provide alternative formats of fundraising materials (different language, accessible formats).<input checked="" type="checkbox"/> Check their understanding at relevant parts of your interaction to ask if anything needs further explanation.<input checked="" type="checkbox"/> Be willing to provide extra time for the person to consider their options.<input checked="" type="checkbox"/> If you think the donor lacks capacity to consent to donate, do not ask for, or accept, the donation.
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For more information go to fia.org.au

TELEPHONE FUNDRAISING CEO JOINS CODE AUTHORITY

In November FIA appointed Ashley Rose, CEO of Mondial Fundraising Communications, to its independent Code Authority, responsible for monitoring and enforcing member compliance with the FIA Code. A career fundraiser who has worked in the sector for 21 years, Mr Rose brings a wealth of on-the-ground experience in fundraising campaigns and will offer a service provider's perspective on matters that come before the Authority.

CONSUMER CAMPAIGNER APPOINTED TO REPRESENT DONOR PERSPECTIVE

In October FIA appointed respected consumer campaigner Christopher Zinn to the independent body responsible for monitoring member compliance with its Code. Mr. Zinn, former head of campaigns and communications at consumer peak body Choice, is a leader in the emerging marketplace of consumer empowerment, having spearheaded successful campaigns to help consumers in complex markets such as energy, financial services and private health insurance.

CODE COMPLIANCE TRAINING REPORT

As of October 2019, some 3,084 fundraisers had enrolled in the Code course, of which 2,195 or roughly 71 percent had successfully completed the training. The Authority urges all FIA members to complete their training to minimise the risk of breaching the Code.

CODE AUTHORITY MEETINGS IN 2019

The Code Authority met on five occasions during the year. Each meeting included a report from the Code monitor and updates from the CEO and regulatory affairs manager. Other regular agenda items included updates on Code training, complaints reporting, communications and Code awareness initiatives. Meetings were routinely followed by a 'communique' to FIA members containing a summary of compliance outcomes and other matters.

At the February meeting, the Chair initiated a review of Code Authority skills requirements. A matrix of the skills of current Authority members was developed and a gap analysis conducted. This information was provided to the FIA Board and the analysis was used in identifying candidates to fill vacancies on the Authority. Deputy Chair Sue-Anne Wallace stepped down from the Authority and was thanked for her significant contributions during her two year term, particularly in the area of complaints handling processes.

The Authority oversaw the development of a new practice note and tools to assist members in ensuring Code compliance by their supply chains, in accordance with the requirements of Section 6 of the Code, which deals with conduct in supplier relationships.

The Authority also oversaw development of a practice note and tools to improve return on investment in regular giving programs, in relation to clause 6.3 which requires members to ensure that supplier costs incurred in fundraising are proportionate to the funds raised and represent fair market value for services provided.

In response to Code monitoring reports, the Authority provided guidance to the CEO in conducting follow up with members on the findings of mystery shopping. It also dealt with a variety of complaints from the public against members and non-members (see next page).

FIA Code Authority

TERMS OF APPOINTMENT

Constitutional position	Name	Appointed on (date of the first CA meeting after the appointment)	Status	Term number	Term completion	Eligible for re-election
Chair	Ursula Stephens	3rd Nov 2017	Current	1	Nov 2019	Yes
Board representative	Jennifer Doubell	3rd Nov 2017	Current	1	Nov 2019	Yes
FIA member representative	Roewen Wishart	3rd Nov 2017	Current	1	Nov 2019	Yes
Professional member representative	Benjamin Cox	3rd Nov 2017	Current	1	Nov 2019	Yes
Professional member representative	Ashley Rose	30th Nov 2019	Current	1	Nov 2021	Yes
Board appointed member	Christopher Zinn	30th Oct 2018	Current	1	Oct 2020	Yes
Deputy Chair	Sue-Anne Wallace	3rd Nov 2017	Resigned	N/A	28th Feb 2019	N/A

ATTENDANCE RECORD

Name	Total Attended	Total Applicable	CA Meeting Date				
			13 Feb 19	28 May 19	28 Jun 19	31 Jul 19	30 Oct 19
Ursula Stephens	4	5	0	1	1	1	1
Jennifer Doubell	5	5	1	1	1	1	1
Roewen Wishart	5	5	1	1	1	1	1
Benjamin Cox	5	5	1	1	1	1	1
Sue-Anne Wallace	1	1	1	N/A	N/A	N/A	N/A
Ashley Rose	1	1	N/A	N/A	N/A	N/A	1
Christopher Zinn	5	5	1	1	1	1	1
TOTAL PER MEETING			5	5	5	5	6

RESOLVED COMPLAINTS AND ENQUIRIES SUMMARY

The following summary of complaints made about FIA members' conduct were satisfactorily resolved, in the Code Authority's view, by prompt corrective action to meet the complainant's wishes and/or by suitable training or counselling where an individual fundraiser's conduct was involved.

- Complaint 1901
 - A person contacted FIA about charities contacting her vulnerable mother and her partner who are pensioners to renew donations.
- Complaint 1902
 - A person was unable to get his name removed from a charity list.
- Complaint 1903
 - Complaint about F2F fundraising at a train station.
- Complaint 1904
 - A complainant said she is continually receiving calls from a non-member charity after asking not to be contacted. April 2019
- Complaint 1905
 - A complainant received calls from a call centre but when he answered the caller hung up immediately.
- Complaint 1906
 - A person complained about charity knockers despite please do not knock sign.
- Complaint 1907
 - The Code Authority initiated an investigation after a charity refused to disclose the source (a rented list) of the mystery shopper's contact details.
- Complaint 1908
 - A person complained that a representative for a charity knocked on her door and tried to use a coercive emotional appeal to elicit a donation.
- Complaint 1909
 - An official from the City of Sydney inquired about the number of complaints received in 2018 and procedure of FIA in dealing with organisations who breach the Code
- Complaint 1910
 - A complainant who thought FIA was a source of donor lists said she felt her privacy had been violated.
- Complaint 1911
 - A person complained about face to face fundraisers who ignored her do not knock sign.
- Complaint 1912
 - A person complained about receiving a call from a charity he had never supported before.
- Complaint 1913
 - A person complained that she received 33 calls in one day.
- Complaint 1914
 - A person complained that her contact details had been shared with multiple charities without her consent.
- Complaint 1915
 - A person complained that his contact details had been shared with multiple charities without her consent.
- Complaint 1916
 - A person complained that her contact details had been shared with multiple charities without her consent.

*Complaints 1913-1916 all relate to the same list supplier who cooperated in resolving the matter.

Membership

If you are involved in any aspect of fundraising, FIA membership will help you achieve your mission.

We are passionate about supporting you, and your organisation, in helping you to achieve best practice fundraising.

We do this by:

- Consulting with government, influencers and the community to set best practice standards and advance professional fundraising
- Developing and maintaining a self-regulatory regime and lobbying for a reduction in the red tape burden our sector faces
- Providing professional development that gives you and your organisation the tools, processes, training and sector updates you need to fundraise with confidence
- Maintaining and making available comprehensive resources to support your professional fundraising journey.

FIA members are signatories to the FIA Code of Conduct and agree to uphold the highest standards of professional and ethical fundraising.

As at 31 December, FIA had 1,151 members, compared to 1,052 the previous year. Growth was particularly strong in organisational membership with a renewal rate of 84% and 130 new organisations becoming part of FIA.

CELEBRATING DISTINGUISHED SERVICE

FIA promotes excellence in fundraising by recognising the achievements of our members in our drive to be the best we can be 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 2019

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.

Lisa Allan FFIA

Leanne Angel FFIA CFRE

Karen Armstrong FFIA CFRE

Chris Benaud FFIA CFRE

Dyls Bertelsen FFIA

Marcus Blease FFIA

Leigh Cleave FFIA CFRE

Gavin Coopey FFIA

Benjamin Cox FFIA

Bianca Crocker FFIA CFRE

Peter Dalton FFIA CFRE

Vicky Dodds FFIA

Jennifer Doubell OAM FFIA CFRE

Meredith Dwyer FFIA CFRE

Jackie Evans FFIA CFRE

Judith Ford FFIA CFRE

James Garland FFIA

Jo Garner FFIA CFRE

Allan Godfrey FFIA

Craige Gravestein FFIA CFRE

Anne Gribbin FFIA CFRE

Nigel Harris FFIA CFRE

Lyn-Marie Hegarty FFIA
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
Vicki James FFIA
Katherine John FFIA
Darrin Johnson FFIA
Diane Kargas Bray AM FFIA
Zoe Karkas FFIA
Clare MacAdam FFIA CFRE
Stephen Mally FFIA CFRE
Evelyn Mason FFIA
Jeremy Maxwell FFIA CFRE
Daniel McDiarmid FFIA CFRE

Tracy McNamara FFIA
Trudi Mitchell 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
Wendy Scaife FFIA
Margaret Scott FFIA CFRE
Rick Sillett FFIA
Kim Sutton FFIA
Alicia Watson OAM FFIA CFRE
Roewen Wishart FFIA CFRE
Savas (Vic) Zacharias FFIA

EMERITUS MEMBERS AS AT 31 DECEMBER 2019

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.

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

HONORARY MEMBERS AS AT 31 DECEMBER 2019

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

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

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 information and skills, hone their leadership and management abilities, and engage in lifelong learning for continuous professional development that improves their results and drives their career forward.



This year FIA continued to grow its Core Education Program that consists of the FIA Code Course, Fundraising Essentials, the Certificate in Professional Fundraising and the Diploma in Professional Fundraising. Fundraising Essentials and Certificate of Professional Fundraising were both online and face-to-face. The Diploma in Professional Fundraising was only offered online. The online Certificate and Diploma in Professional Fundraising continue to attract enrolments across Australia and several enquiries from overseas.

FIA introduced five new Skills-Specific courses for the year, which proved to be successful. These included Donor Journey Mapping, Digital Transformations, Fundraising Communications, What's Your Story? and Stepping Into Fundraising, and we moved our Gifts in Wills Essentials course from inhouse to an online offering to ensure professionals can access this training all year round.



In 2019, FIA offered 48 in-class courses nationally with a total of 499 enrolments. Combined with the online enrolments of 104 students, FIA professionally trained 603 students this year and 268 people also attended our webinars.

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.

FIA would like to thank all the tutors who provided their expertise for the 2019 professional development program:

- **Dan Bernstein MFIA**
Consultant, FundraisingForce
(Certificate in Professional Fundraising)
- **Maisa Lopes Gomes De Paiva MFIA**
Digital Strategy Manager, Cerebral Palsy Alliance
(Certificate in Professional Fundraising and Digital Transformations)

- **Francesca Cinelli EMFIA CFRE**
Acquisition & Retention Manager, Wesley Mission
(Certificate in Professional Fundraising/Fundraising Essentials)
- **Bianca Crocker FFIA CFRE**
Community Change Architect, Fish Community Solutions
(Certificate in Professional Fundraising/Fundraising Essentials)
- **Leanne Dib**
CEO, St George & Sutherland Medical Research Foundation
(Fundraising Essentials/Certificate in Professional Fundraising)
- **Stephen Mally FFIA CFRE**
Director, FundraisingForce
(Fundraising Essentials)
- **Heiko Plange-Korndoerfer FFIA CFRE**
Head of Fundraising, Perth Children's Hospital Foundation
(Fundraising Essentials/Certificate in Professional Fundraising)
- **Tracey Finlay CFRE**
Principal Lead, Tracey Finlay Fundraising Solutions
(Fundraising Essentials)
- **Frank Chamberlin EMFIA**
Copywriter, Action Words
(Copywriting Essentials)
- **John Wright MFIA**
Director, Wright Approach Marketing
(Gifts in Wills Masterclass)
- **Paul Evans**
Manager, Bequests, World Vision Australia
(Gifts in Wills Masterclass)
- **Craige Gravestain FFIA CFRE**
Chief Big Gifts, Xponential
(Developing a Major Gifts Program)
- **Brian Holmes FFIA CFRE**
Philanthropologist, Xponential
(Developing a Major Gifts Program)
- **Mike Zeederberg**
Managing Director, Zuni
(Donor Journey Mapping)
- **Clare Joyce MFIA**
Editor-in-Chief, Bombora Publishing
(What is Your Story?)
- **Pamela Sutton-Legaud MFIA CFRE**
Principal Consultant, AskRIGHT
(CFRE study group tutor)

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:

Beaumont People	Australian Red Cross
Leukaemia Foundation	Heart Foundation
QIMR	The University of Newcastle
Guide Dogs SA/NT	Gold Coast Hospital Foundation
Cancer Council Victoria	Hear and Say
Ronald McDonald House Charities WA	Charles Darwin University
Stroke Foundation	

FIA WEBINARS

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 2019 Webinar Series, and to all our presenters for graciously offering their time, preparing and presenting their webinars.

People Matter: Grow your volunteer base – Rochelle Courtenay (Share the Dignity)

Harnessing Strengths to Achieve Your Fundraising Goals – Leanne Warner (Langley Group)

Moving Up: How to step from middle management into senior fundraising leadership roles – Rosheen Singh (Beaumont People)

Introduction to How to Network on LinkedIn to Get More of the Clients you Deserve – Karen Hollenback (Think Bespoke)

The New Millionaires Next Door and Far Away: Adopting a Diverse & Globalised Approach to Major Gift Fundraising – Mide Akerewusi (AgentsC)

GivingTuesday Australia – Cathy Truong (Give Now and GivingTuesday Australia)

Pathways to Success for Young Fundraisers – Alan White MFIA CFRE (Asylum Seeker Resource Centre)

Effective Self-Regulation in Fundraising – Katherine Raskob and Scott McClellan (FIA)

PCI DSS Compliance: Taking a prioritised approach and creating a collaborative ecosystem – Sanjay Verma (Terra Firma)

SCHOLARSHIPS

In 2019 FIA offered the following scholarships:

FISH COMMUNITY SOLUTIONS SCHOLARSHIP

The Fish Community Solutions Scholarship was offered again in 2019 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 **Bridget Staude - Teach Learn Grow**. Teach Learn Grow is a fabulous organisation helping improve educational outcomes for students in rural and remote

regions where Bridget Staude is the CEO. Teach Learn Grow aims to improve the educational outcomes and aspirations of rural and remote students in socioeconomic disadvantaged areas so that they can reach their full potential. They do this by recruiting and training volunteers to provide free tutoring and mentoring – predominantly online – to young people experiencing educational disadvantage.

BMS SCHOLARSHIP

The BMS Scholarship is provided to support the continuing professional development of the future leaders of fundraising. This scholarship is open to current individual members or staff of organisation members of FIA who have a minimum of three years' experience in professional fundraising to be awarded a place on the Diploma of Professional Fundraising.

The 2019 scholarship recipient was Jolene Molloy, Fundraising and Bequest Programs Coordinator, ACTU.

THE FIA MENTORING PROGRAM

The opportunity to participate in FIA's National Mentoring Program is a major benefit offered to all FIA members. It is an aspirational program that seeks to provide an avenue for professional fundraisers to gain advice, offer support and improve their understanding of the not-for-profit sector.

The Mentoring Program is for mentors and mentees, so whether you want to contribute to the sector, or you want to grow your knowledge and skills, the FIA Mentoring Program can help.

In 2019 the program was reconfigured and developed as a national offering. There is an annual cohort and in 2019, 93 mentoring relationships were formed.

CERTIFIED FUND RAISING EXECUTIVES (CFRE) AS AT 31 DECEMBER 2019

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. 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.

Ms Christine Anderson MFIA CFRE

Mrs Leanne Angel FFIA CFRE

Ms Karen Armstrong FFIA CFRE

Mr Paul Bailey MFIA CFRE

Miss Natalie Barnett MFIA CFRE

Ms Kelly Burmeister MFIA CFRE

Mr Chris Benaud FFIA CFRE

Mr Paul Benjamin MFIA CFRE

Ms Robin Cabral MFIA CFRE

Ms Lee Christian MFIA CFRE

Ms Bianca Crocker FFIA CFRE

Mrs Kerry Cutting EMFIA CFRE

Mr Peter Dalton FFIA CFRE

Ms Elizabeth Davis EMFIA CFRE

Ms Jennifer Doubell OAM FFIA CFRE

Mrs Kimberly Downes EMFIA CFRE

Ms Meredith Dwyer FFIA CFRE

Ms Kate Eddy MFIA CFRE

Ms Marla Edwards MFIA CFRE

Ms Jackie Evans FFIA CFRE

Mr Ron Fairchild MFIA CFRE

Mr Peter Fletcher FFIA (Emeritus) CFRE

Mrs Judith Ford FFIA CFRE

Ms Lorraine Fraser EMFIA CFRE

Ms Karen Gair MFIA MAHP; CFRE

Ms Jo Garner FFIA CFRE

Mrs Simone Garske MFIA CFRE

Mr Craige Gravestain FFIA CFRE

Ms Anne Gribbin FFIA CFRE

Mr Nigel Harris FFIA CFRE

Ms Rebecca Hazell EMFIA CFRE
Mr Maurice Henderson FFIA FAHP; CFRE
Mr Mark Hindle FFIA FAHP; CFRE
Ms Ellaine Hislop EMFIA CFRE
Mr Brian Holmes FFIA CFRE
Mrs Tanya Hundloe FFIA CFRE
Mrs Jannine Jackson FFIA CFRE
Mr Earle Johnston MFIA CFRE
Mr Matthew Lang MFIA CFRE
Mrs Clare MacAdam FFIA CFRE
Mrs Mary Macuga MFIA CFRE
Mr Stephen Mally FFIA CFRE
Mr Jeremy Maxwell FFIA CFRE
Mr Lindsay May OAM FFIA CFRE
Ms Karen McComiskey MFIA CFRE
Mr Daniel McDiarmid FFIA CFRE
Ms Susan Morrow MFIA CFRE
Ms Kari Musick Sharp MFIA CFRE
Ms Shanthini Naidoo MFIA CFRE
Miss Cherie Nicholas MFIA CFRE
Mr Leo Orland FFIA CFRE
Mr David Osborne EMFIA CFRE
Mr Heiko Plange-Korndoerfer FFIA CFRE
Ms Cheryl Pultz EMFIA CFRE

Mrs Vicki Rasmussen FFIA CFRE
Ms Lesley Ray FFIA CFRE
Mrs Marilyn Rickard CFRE
Ms Libby Rodgers-McPhee CFRE
Mr Len Russell MFIA CFRE
Ms Charlotte Sangster EMFIA CFRE
Ms Margaret Scott FFIA CFRE
Mrs Pamela Sutton-Legaud MFIA CFRE
Ms Sharyn Tidswell MFIA CFRE
Mr John Townend FFIA (Emeritus) CFRE
Ms Michelle Trevorrow FFIA (Emeritus) CFRE
Ms Sonya Tufnell MFIA CFRE
Ms Alicia Watson OAM FFIA CFRE
Mr Alan White MFIA CFRE
Ms Susanne Williamson CFRE
Mr Roewen Wishart FFIA CFRE
Mr Randy Wood MFIA CFRE
Mr Carl Young MFIA CFRE
Mr Mahza Ahadiwans MFIA CFRE
Ms Frances Cinelli EMFIA CFRE
Ms Victoria Andrews MFIA CFRE
Ms Maggie Hsieh MFIA CFRE
Ms Julie Mullen MFIA CFRE
Ms Nichole Alfreds EMFIA CFRE



FIA Conference 2019



The Fundraising Conference is an integral part of FIA's annual professional development education program and remains the largest gathering of fundraisers in the southern hemisphere. Each year the conference program is designed to ensure that fundraisers get exposure of both core and up-to-date fundraising techniques, disciplines, trends and ideas. It provides an opportunity to examine the present and future direction of the industry and is the peak event of its kind in Australia and Asia Pacific.

FIA Conference 2019 was an amazing success, held in Melbourne from 27 Feb – 1 March 2019 at the Melbourne Convention & Exhibition Centre. A huge thank you to our committee, supporters and speakers who worked on FIA Conference 2019.

FIA CONFERENCE PROGRAM COMMITTEE

We would like to say thank you to the 2019 FIA Conference Program Committee for all their hard work and dedication.

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 FFIA
Ruthann Richardson MFIA
Carrie Fletcher MFIA

Alice Anwar MFIA
Paul Bailey MFIA CFRE
Leigh Cleave FFIA CFRE
Alex Struthers
Peter Dalton FFIA CFRE
Margaret Scott FFIA CFRE
Yvette Peterson
Vicki Rasmussen FFIA CFRE
Ruth Wicks MFIA
Emily Wigney



FIA CONFERENCE SUPPORTERS

Conference Partner **marlin**

Principal Sponsors **blackbaud**™ **dca** **pareto**fundraising
> power your passion database consultants australia

bluestar* **FundRaise**
an ive business by OSKY

Major Sponsors **STRATEGIC GRANTS** **INSPIRED ADVENTURES**

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Supporting Sponsors **fr&c** Fundraising Research & Consulting **HAYS** Recruiting experts worldwide **go**fundraise GO MAKE A DIFFERENCE

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

Media Partners **F&P** **PRO AUSTRALIA** **Connecting Up**
FUNDRAISING & PHILANTHROPY

Corporate Sponsors **bluestar*** **dca**
an ive business database consultants australia

FIA CONFERENCE SPEAKERS

Nadia Aden
Mide Akerewusi
Bisi Alimi
Lisa Allan FFIA
Pam Anders
Jim Anderson CFRE
Leanne Angel FFIA CFRE
Mark Anscombe
Alice Anwar MFIA
Karen Armstrong FFIA CFRE
Paul Bailey MFIA CFRE
Deli Baker
Louise Baxter
Dan Bernstein MFIA
Sally Biles MFIA
Kristy Blake MFIA
Marcus Blease FFIA
Louise Bonomi
Catherine Braybon
Jeff Brooks
Tanya Hundloe FFIA CFRE
Samantha Brown
Joshua Buckle
Sandy Cameron
Rachel Carr
Lisa Cheng
Jan Chisholm
Marlene Cirillo
Ben Clark
Alan Clayton
Leigh Cleave FFIA CFRE
Rebecca Cleaver
Abby Clemence MFIA
Jackie Coates
Bianca Crocker FFIA CFRE
Kat Crowley
Justine Curtis MFIA
Lachlan Dale
Leila Davis
Anneloes de Graeff
Micah Demmert
Raquel Dillon MFIA
Shannan Dodson
Jennifer Doubell OAM FFIA CFRE
Gavan Duffy
Tom Duggan CFRE
Luke Edwards MFIA
Kate Fazio
Alan White MFIA CFRE
Killian Feehan
Yani Ferdinandus
Alice Ferris
Dr Elvira Fischer
Shannon Fleming MFIA
Helen Forde
James Garland FFIA
Alisha Elliott
Dan Geaves
Samara Gentle
Matthew Gibson
Fiona Gillen
Allan Godfrey FFIA
Susie Greig-Rouffignac
Elana Harari
Nigel Harris FFIA CFRE
Amelia Hart
Bethan Hazell MFIA
Elaine Herlihy
Andrew Hill MFIA
Grant Hooper
Ross Howe MFIA
Claire Hughes MFIA
Jez Hunghanfoo
Russell James
Earle Johnston MFIA CFRE
Julia Keady MFIA
Jenny Kearney
Erin Kiely
Richelle King
Dan Kneipp MFIA
Sacha Koltun
Karen Lawrie
Karen Laws
Ben Littlejohn MFIA
Nicola Long MFIA
Tamsin Loy
Jess Lucas MFIA
Clare Gleghorn
Anne Lytle
Melissa Macpherson
Jessica Macpherson MFIA
Nick Martin
Estelle McGuigan
Lachlan McKenzie
Rachael McLennan
Andrea McManus
Fiona McPhee
Helen Merrick
Curtis Moore
Susan Morrow MFIA CFRE
Georgina Murray
Scott Nicholson MFIA
Eddie O'Loughlin
Martin Paul MFIA
Donna Purcell
Vicki Rasmussen MFIA CFRE
Ashley Rose MFIA
Eva Ross
Andrew Sabatino MFIA
Tim Sadler MFIA
Charlotte Sangster EMFIA CFRE
Adrian Sargeant
Brendan Scott
Eddie Skelic
Cory Steinhauer
Heather Stott MFIA
Alex Struthers
Paul Tavatgis MFIA
Christopher Thorn
Mat Tinkler
Sean Triner
Michael Turnley
Helen Van Nooten
Melanie Verges
Adam Watson MFIA
Martin Williams
Roewen Wishart FFIA CFRE
Carl Young MFIA CFRE



FIA Awards for Excellence in Fundraising 2019

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.

Thank you to our Principal Sponsors of the Awards for Excellence in Fundraising



Precision

Fundraising



JUDGES

We would like to thank all our 2019 judges for their time and effort.

Donor Acquisition

Paige Gibbs MFIA
Pamela Sutton-Legaud MFIA CFRE
Lisa Miller MFIA
Christine Anderson MFIA CFRE

Donor Renewal

Rebecca Miller EMFIA
Lisa Miller MFIA
Christine Anderson MFIA CFRE
Diane Kargas Bray AM FFIA

Major Gifts

Tessa Irwin MFIA
Dr Karen Firestone
Margaret Scott FFIA CFRE
Rebecca Cuthill MFIA

Bequests & Gifts in Wills

Susan Morrow MFIA CFRE
Veronica Gargano MFIA
Katherine Ash MFIA

Magdalena Lane

Capital Campaigns

Pamela Sutton-Legaud MFIA CFRE
Tessa Irwin MFIA
Len Russell MFIA CFRE
Helen Falla MFIA

Special Events

Kari Musick Sharp MFIA CFRE
Charlotte Sangster EMFIA CFRE
Jackie Evans FFIA CFRE
Meredith Dwyer FFIA CFRE
Judy Ford

Special or Emergency Projects

Tori Anderson MFIA
Karen McComiskey MFIA CFRE
Jackie Evans FFIA CFRE
Di Bray AM EMFIA

STATE JUDGES

NSW

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

VIC

Pamela Sutton-Legaud MFIA CFRE
Veronica Gargano MFIA

QLD

Young Fundraiser of the Year
Alex Struthers
Margaret Scott FFIA CFRE
Vicki James MFIA

Fundraising Team of the Year

Ben Cox FFIA
Margaret Scott FFIA CFRE
Vicki James FFIA

WA

Tanya Hundloe FFIA CFRE
Carolyn Turner MFIA
Lyn-Marie Hegarty FFIA
Vicki Rasmussen FFIA CFRE

NATIONAL JUDGES

Katherine Raskob
Moirra Clarkson
Allan Godfrey FFIA
James Garland FFIA

ORGANISATIONAL AWARD WINNERS AND FINALISTS

DONOR ACQUISITION

Over \$5 million revenue

Winner

- Plan International Australia – Change For Girls – A New Regular Giving Product For Plan International Australia

Highly Commended

- Royal Flying Doctor Service Victoria – Flying Doctor Support Crew (Face to Face Acquisition)

Finalist

- The Smith Family – Back to School Sponsorship Drive

Under \$5 million revenue

Winner

- Guide Dogs QLD – 2018 Acquisition Campaign

Highly Commended

- Royal Society for the Blind – For Your Eyes Only

Finalist

- Melbourne City Mission – The Big Issue Magazine Insert: Christmas 2017 Pilot

DONOR RENEWAL

Sponsored by:  Precision | Fundraising

Over \$5 million revenue

Winner

- Leukaemia Foundation – 2018 Tax Appeal

Highly Commended

- Royal Flying Doctor Service Victoria – RFDS Victoria 90th Year Tax Appeal

Finalist

- Asylum Seeker Resource Centre – It's not charity, it's a chance – ASRC Winter Appeal

Under \$5 million revenue

Winner

- Guide Dogs QLD – 2018 Tax Appeal

Highly Commended

- UnitingWorld – EOFY Appeal 2018 (Bali)

Finalist

- Anglicare WA – Anglicare WA 2018 Winter Appeal

MAJOR GIFTS

Under \$5 million revenue

Winner

- Orygen Youth Mental Health – Substance Use Prevention for Youth Mental Health (VIC)

BEQUESTS/GIFTS IN WILLS

No finalists for 2019

CAPITAL CAMPAIGNS

Sponsored by: 
xponential

Over \$5 million revenue

No finalists for 2019

Under \$5 million revenue

Winner

- Harry Perkins Institute of Medical Research – Chair in Cardiovascular Disease Campaign (WA)

Finalist

- Mercy Health Foundation – Werribee Mercy Hospital Critical Care Unit Appeal



SPECIAL EVENTS

Sponsored by:



Over \$5 million revenue

Winner

- Mater Foundation – 2018 RACQ International Women’s Day Fun Run (QLD)

Highly Commended

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

Finalists

- Leukaemia Foundation – World’s Greatest Shave – 20th Anniversary
- National Heart Foundation of Australia – Give with Heart Day
- National Heart Foundation of Australia – MyMarathon

Under \$5 million revenue

Winner

- Variety – The Children’s Charity of Queensland – 2018 Yamaha Variety Jet Trek (Sydney to Yamba) (QLD)

Highly Commended

- Anglicare WA – Anglicare WA 2018 School Sleep Out

Finalists

- ActionAid Australia – The Strong Women Challenge
- Legacy Brisbane – Legacy’s Canungra Combat Challenge

SPECIAL/EMERGENCY PROJECTS

Over \$5 million revenue

Highly Commended

- Asylum Seeker Resource Centre – Let Them Stay Appeal (VIC)

Under \$5 million revenue

No finalists for 2019

BEST VOLUNTEER PROGRAM

No finalists for 2019

PRINCIPAL CATEGORY AWARDS

MOST INNOVATIVE CAMPAIGN

Sponsored by:



Winner

- Plan International Australia – Change for Girls – A New Regular Giving Product For Plan International Australia

MOST OUTSTANDING FUNDRAISING PROJECT

Sponsored by:



Winner

- Harry Perkins Institute of Medical Research – Chair in Cardiovascular Disease Campaign

THE ARTHUR VENN FUNDRAISER OF THE YEAR AWARD

Sponsored by:

marlin

Winner

- Meredith Dwyer FFIA CFRE



YOUNG FUNDRAISER OF THE YEAR

Sponsored by:



ROBEJOHN

Winner

- Alan White MFIA CFRE (VIC)

Finalists

- Emily Cox (NSW)
- Claire Hughes MFIA (QLD)
- Rikki Stewart MFIA (WA)

VOLUNTEER OF THE YEAR

No finalists for 2019

FUNDRAISING TEAM OF THE YEAR

Sponsored by:



Winner

- Peter MacCallum Cancer Foundation

Finalists

- National Breast Cancer Foundation
- Leukaemia Foundation
- Ronald McDonald House Charities Western Australia

Include a Charity

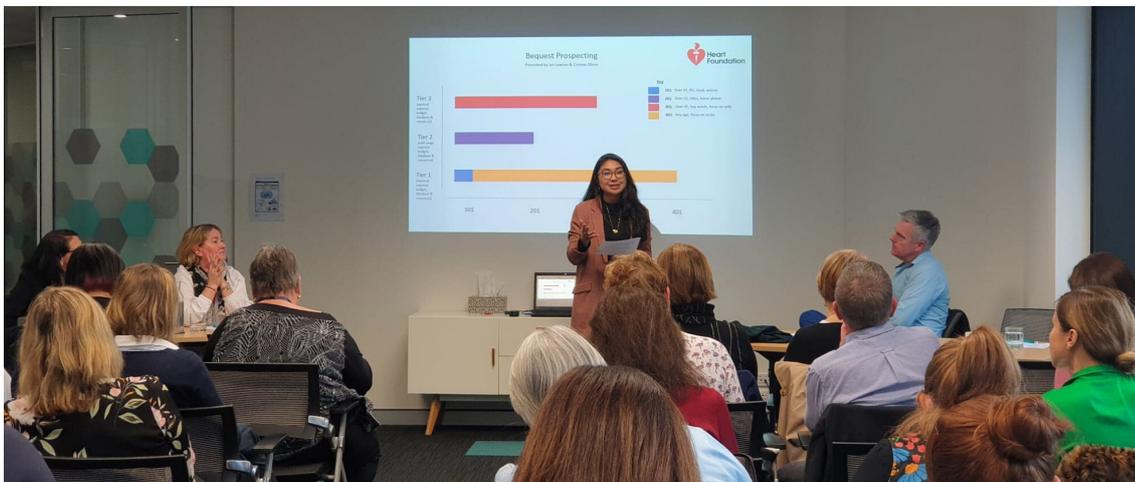
include a charity
Help the work live on.

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 75 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 8th Include a Charity Week focusing on speaking to the general community through advertising, PR and digital channels and supporting the sector through events; the inaugural Australian Legacy Foresight's report; benchmarking; and implementing our legal engagement campaign.



AUSTRALIAN GIFTS IN WILLS 2040: THE INAUGURAL LEGACY FORESIGHT REPORT

In 2019 Include a Charity commissioned Legacy Foresight to analyse recent trends in Australian gifts in wills giving and explore the long-term outlook for the sector over the next 20 years. This work built on Legacy Foresight's long experience of benchmarking, researching and forecasting the gifts in wills sector in the UK, and more recently the Netherlands, together with a solid assessment of Australia's own unique market trends and drivers.

Overall, the report found that the outlook for the Australian gifts in wills sector is very positive – thanks to underlying demographic and economic factors, real incomes will more than double over the next 20 years.

The report was released in September 2019 as part of Include a Charity Week and will be a useful tool for Include a Charity supporters to use over the next few years.

Thank you to our partners for this project: Australian Executor Trustees, More Strategic and Pareto Benchmarking.

INCLUDE A CHARITY ADVISORY COMMITTEE 2019

We would like to thank the Include a Charity Advisory Committee who provide valuable insight and expertise to assist the running of this campaign.

Roewen Wishart FFIA CFRE (Chair)

Dr. Christopher Baker MFIA

Kelly Burmeister MFIA – Mater Foundation

Jakki Travers – The Smith Family

Ian Lawton – National Heart Foundation

Martin Williams – Save The Children

Paul Evans – Makinson d'Apice

Suzanne Brown MFIA – The Salvation Army

Bethan Hazell MFIA – Peter MacCallum Cancer Centre

FIA Foundation



**Fundraising Institute
Australia Foundation**
Research • Education • Innovation

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 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 the development of fundraising education and research.

2019 ACHIEVEMENTS

In 2019 the FIA Foundation delivered a key piece of sector research. 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. It was released at the FIA National Conference. 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.

Over 2020 this research will be developed into an Advanced Fundraising Leadership Course by Professor Wendy Scaife FFIA, of the Australian Centre for Non-Profit & Philanthropy Studies, at QUT.

The majority of this work was funded by a generous bequest to the FIA Foundation from Jim Weber FFIA; and aims to honour Jim's legacy by helping to advance the profession and promote excellence in fundraising.

State Committees

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, and 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

Chair: Ann Ronning MFIA
Alicia Edwards MFIA
Diane Kargas Bray AM FFIA
Helen Falla MFIA
Hilde Schneider MFIA
Jason Haines MFIA
Judith Ford FFIA CFRE
Mary Anne King

NEW SOUTH WALES

Chair: Tessa Irwin MFIA
Stephen Mally FFIA CFRE
Len Russell MFIA CFRE
Anthea Cohen MFIA
Cara Morrison MFIA
Elizabeth Phegan MFIA
Julie Johnson EMFIA
Karen Armstrong FFIA CFRE
Karen Firestone
Karl Tischler MFIA
Maisa Lopes Gomes De Paiva MFIA
Christine Roberts FFIA



QUEENSLAND

Chair: Meredith Dwyer FFIA CFRE
Alexandra Struthers MFIA
Brooke Rose
Abby Clemence MFIA
Katherine Ash MFIA
Benjamin Cox FFIA
Cherie Nicholas MFIA
Christine Anderson MFIA
Kim Sutton FFIA
Vicki James FFIA
Victoria Andrews MFIA CFRE
Daniel Lalor MFIA
Claire Hughes MFIA
Sue Birch MFIA



VICTORIA

Chair: Karen McComiskey MFIA CFRE
Alan White MFIA CFRE
Ant Clark MFIA
Antonia Makker MFIA
Ben Holgate MFIA
Cory Hall MFIA
Francesca Barnett AMFIA
Joel Nicholls MFIA
Kalimar Donvin-Irons MFIA
Natalie Barnett MFIA CFRE
Pamela Sutton-Legaud MFIA CFRE
Shuie Gestetner MFIA
Steffi Chang MFIA
Stephen Ellis MFIA



TASMANIA

Chair: Cath Adams MFIA
Rebecca Townsend
Michelle Folder MFIA
Rebecca Cuthill MFIA
Brad Watson MFIA
Amanda French
Erica Larke-Ewing MFIA



SOUTH AUSTRALIA & NORTHERN TERRITORY

Chair: Rebecca Miller EMFIA
Elizabeth Davis EMFIA CFRE
Sarah Lenigas
Leanne Marchington
Mark Foyle MFIA
Karen Glazbrook
Cassie Magin
Raquel Dillon MFIA

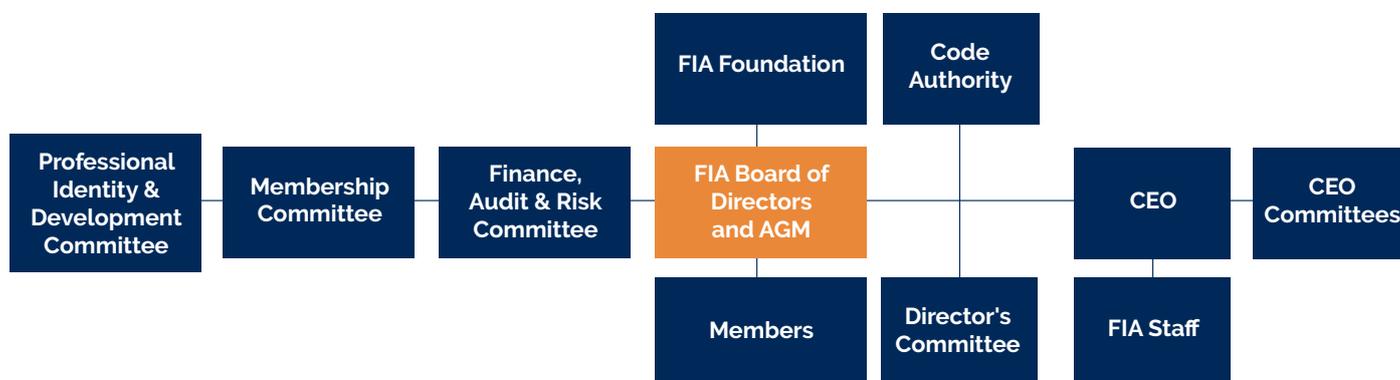


WESTERN AUSTRALIA

Chair: Bec Stott EMFIA
Vicki Rasmussen FFIA CFRE
Ashlie Marshall EMFIA
Hazel Grunwaldt MFIA
Tanya Hundloe FFIA CFRE
Carolyn Turner MFIA
Laura Kazmirowicz MFIA
Rikki Stewart MFIA
Elaine Hislop EMFIA CFRE
Ferdie Fourie MFIA
Victoria Anderson MFIA
Andrea Alexander EMFIA

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 2019

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 2019 and looks forward to serving with them in 2020.



CHAIR SINCE 2018
James Garland FFIA

Director, Dalton 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 FFIA

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)
Vicki Rasmussen FFIA CFRE

Executive Director, Charlies Foundation for Research; FIA Committee 2018-2020; FIA Conference Speaker 2019; Arthur Venn Fundraiser of the Year 2017; FIA Conference Program Chair 2016
Appointed Director, February 2019.



DIRECTOR (VICTORIA)
Alan White MFIA CFRE

Director – Fundraising & Marketing, Asylum Seeker Resource Centre

Co-opted March 2019; FIA Conference Speaker 2019; FIA Victoria Committee 2018-2020; National Young Fundraiser of the Year 2019



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 OAM 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 Bleas 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.
(resigned November 2019)

CONSTITUTIONAL AND DIRECTORS COMMITTEES

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

In 2019, the Board introduced 3 new subcommittees to ensure different areas of the business have strategic input and oversight. The following committees have been active in 2019. We would like to thank all those who provide advice and input as part of these committees.

FINANCE, AUDIT AND RISK COMMITTEE

Chair: Trudi Mitchell FFIA

James Garland FFIA

Paul Flynn MFIA

Jim Hungerford MFIA

Joe Shannen C.A.

MEMBERSHIP

Chair: Stephen Mally FFIA CFRE

Allan Godfrey FFIA

Warwick Hay MFIA

Penny Egan

Tracey Gillinder MFIA

PROFESSIONAL DEVELOPMENT AND IDENTITY

Chair: Meredith Dwyer FFIA CFRE

Nigel Harris FFIA CFRE

Dan Lalor MFIA

Marcus Blease FFIA

Michelle Folder MFIA

FIA FOUNDATION

Chair: Elizabeth Davis EMFIA CFRE

James Garland FFIA

Ben Holgate MFIA (resigned November 2019)

Peter Dalton FFIA CFRE

Leo Orland FFIA CFRE

Zoe Karkas FFIA

Tanya Hundloe FFIA CFRE

Christine Anderson MFIA CFRE

FELLOWS NOMINATIONS COMMITTEE

Chair: Vicki Rasmussen FFIA CFRE

Leanne Angel FFIA CFRE

Sharon Hillman FFIA

Tracy McNamara FFIA

Roewen Wishart FFIA CFRE

NOMINATIONS COMMITTEE

Chair: Nigel Harris FFIA CFRE

James Garland FFIA

Vicki Rasmussen FFIA CFRE

Paul Flynn MFIA

Judith Ford FFIA 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.

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



**STATEMENT OF PROFIT OR LOSS
AND OTHER COMPREHENSIVE INCOME**
for the Year Ended 31 December 2019

	Note	2019 \$	2018 \$
Revenue	2	3,408,094	3,414,145
Administration expenses		(59,577)	(73,493)
Conference, workshop and campaign expenses		(1,723,186)	(1,892,593)
Occupancy expenses		(162,583)	(162,787)
Employee benefits expense		(1,583,978)	(1,410,485)
Depreciation and amortisation	3	(57,007)	(57,013)
		<hr/>	<hr/>
		(3,586,331)	(3,596,371)
		<hr/>	<hr/>
Deficit		(178,237)	(182,226)
		<hr/>	<hr/>

STATEMENT OF FINANCIAL POSITION

as at 31 December 2019

	Note	2019 \$	2018 \$
ASSETS			
Current Assets			
Cash and cash equivalents	6	2,214,719	1,965,432
Receivables	7	285,987	375,956
Other assets	8	4,423	2,300
Total current assets		2,505,129	2,343,688
Non-current assets			
Software, plant and equipment	9	11,586	23,811
Rebrand and Development costs	17	44,780	89,559
Right to use assets	18	418,448	-
Total non-current assets		474,814	113,370
TOTAL ASSETS		2,979,943	2,457,058
LIABILITIES			
Current liabilities			
Payables	10	262,226	134,397
Provisions	12	58,259	51,998
Deferred income	11	1,465,952	1,329,779
Funds held on trust		46,849	46,040
Lease liabilities	18	123,330	-
Total current liabilities		1,956,616	1,562,214
Non-current liabilities			
Provisions	12	30,073	18,471
Lease liabilities	18	295,118	-
Total non-current liabilities		325,191	18,471
TOTAL LIABILITIES		2,281,807	1,580,685
NET ASSETS		698,136	876,373
EQUITY			
Accumulated funds		698,136	876,373
TOTAL EQUITY		698,136	876,373

STATEMENT OF CHANGES IN EQUITY

for the Year Ended 31 December 2019

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

2019	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2019	876,373	876,373
Deficit for the year	(178,237)	(178,237)
Balance at 31 December 2019	698,136	698,136

STATEMENT OF CASH FLOWS

for the Year Ended 31 December 2019

	Note	2019	2018
		\$	\$
Cash from operating activities:			
Receipts from members and customers		3,739,652	3,745,140
Payments to suppliers and employees		(3,362,458)	(4,090,723)
Interest received		8,319	9,472
Lease payments		(136,226)	-
Net cash provided by/(used in) operating activities	14	249,287	(336,111)
Cash flow from investing activities:			
Payment for non-current assets		-	(15,385)
Payment for rebranding		-	(134,338)
Net cash (used in) investing activities		-	(149,723)
Net increase/(decrease) in cash and cash equivalents held		249,287	(485,834)
Cash and cash equivalents at beginning of financial year		1,965,432	2,451,266
Cash and cash equivalents at end of financial year	6	2,214,719	1,965,432

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**AUDITORS INDEPENDENCE DECLARATION
TO THE RESPONSIBLE ENTITIES OF FUNDRAISING INSTITUTE AUSTRALIA**

I declare that, to the best of my knowledge and belief, during the year ended 31 December 2019 there have been no contraventions of:

- i. no contraventions of the auditor's independence requirements in relation to the audit; and
- ii. no contraventions of any applicable code of professional conduct in relation to the audit.

KS Black & Co
Chartered Accountants



Scott Bennison
Partner

Dated in Sydney on this *30th day of January 2020.*

INDEPENDENT AUDITOR'S REPORT

To the Members of Fundraising Institute Australia

Opinion

We have audited the accompanying financial report of Fundraising Institute Australia, which comprises the Statements of financial position as at 31 December 2019, the statements of profit or loss and other comprehensive income, the statements of changes in equity and the statements of cash flows for the year then ended, notes comprising a summary of significant accounting policies and other explanatory information, and the responsible entities' declaration of the company.

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

- i) giving a true and fair view of the Company's financial position as at 31 December 2019 and of its financial performance for the year then ended; and
- ii) complying with Australian Accounting Standards and the financial reporting requirements of the Australian Charities and Not-for-profits Commission Regulation 2013.

Basis of opinion

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

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

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

Other information

The responsible entities are responsible for the other information. The other information comprises the information in the Company's annual report for the year ended 31 December 2019, but does not include the financial report and the auditor's report thereon.

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

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

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

Responsible Entities' responsibility for the financial report

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

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

Auditor's responsibility for the audit of the financial report

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

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

KS Black & Co
Chartered Accountants



Scott Bennison
Partner

Dated: 30/1/2020
Sydney



FIA

**Fundraising
Institute
Australia**

The Professional Body for Australian Fundraising

FIA would like to thank and
acknowledge the continued
support of our national partners:

ive

dca
database consultants australia

Prepared by Fundraising Institute Australia

31 December 2019

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