



FIA

**Fundraising
Institute
Australia**

The Professional Body for Australian Fundraising

Annual Report 2020

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About Fundraising Institute Australia

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

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

MEMBERSHIP

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

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

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

Members are signatory to FIA's Code of Conduct, and therefore uphold the ethical and professional standards of fundraising.

PUBLIC ACKNOWLEDGEMENT OF MEMBERSHIP

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

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



**ORGANISATIONAL
MEMBER**



**PROFESSIONAL
MEMBER**

State Of The Sector

In 2020, 96% of donors believe that non-profit organisations are essential for creating change. Also, 90% believe they are ethical and trustworthy, according to Nonprofit Tech for Good’s *Global Trends in Giving* report.¹ Meanwhile, researchers who reviewed nine years of Edelman Trust Barometer data in 31 countries concluded: “Overall, we find no evidence of a crisis of trust in nonprofits; scandals within individual organizations have not affected sectoral trust.”²

There are over 58,000 registered charities in Australia, with the charitable sector generating \$155 billion in revenue, including \$10.5 billion in donations and bequests. It employs 1.3 million people and has 3.7 million volunteers, according to the 2018 *Australian Charities Report* by the Australian Charities and Not-for-profits Commission.³

Before COVID-19, *The McCrindle Australian Communities 2020* report found charitable giving remained strong in Australia, with four in five Australians (82%) donating to causes. Forty-six per cent of Australians are “need responders” with Generations Y and Z driving the trend. Given 2020 was a year that included a pandemic, bushfires, floods and drought, disaster response was, not surprisingly, the most popular cause to support with 54% of Australians, followed by animal welfare/wildlife (47%) and children’s charities (44%).⁴

Individual Australians significantly increased their charitable giving in the 2017-18 financial year with a total of \$3.75 billion donated, a 7.61% increase (or \$265 million) on the previous year, according to the latest deep dive into *Australian Tax Office* statistics on tax-deductible giving, compiled by QUT’s Australian Centre for Philanthropy and Nonprofit Studies. The average gift increased by nearly 10%, from \$770 to \$845. New South Wales took the top spot for the most generous state, followed by Victoria and Western Australia. While the proportion of Australians making deductible gifts has fallen every year since 2011-12, those who still give are giving more.⁵

The IVE Group’s *Benchmarking Industry Trends 2020* report found the total number of donors recruited remained stable with donor development a focus of many charities in the maturing Australian market.⁶

The 2019-20 bushfire emergency relief fundraising by charities and individuals raised more than \$500 million in funds to bushfire-related causes, surpassing previous emergency fundraising efforts. The *Public Attitudes to Bushfires Fundraising* report by More Strategic revealed 53% of Australians donated to a bushfire appeal. And 70% agreed they would continue to give in similar amounts to causes they already support. Significantly, 68% of respondents felt non-profits working in spheres unrelated to bushfire emergencies still needed to fundraise for their beneficiaries.⁷ Meanwhile, 1.3 million people around the world donated to the Celeste Barber fundraiser, which raised an astonishing \$51 million.

Australians and New Zealanders were the most likely to adopt new fundraising technology, according to the *Global Trends in Giving* report. They have the highest rate of donors preferring to give online with a credit/debit card at 64% compared to the benchmark of 55%. The Antipodes also

¹ *Global Trends in Giving*, Nonprofit Tech for Good

² *No Global Crisis of Trust: A Longitudinal and Multinational Examination of Public Trust in non Profits*

³ *Australian Charities Report* (2018), Australian Charities and Not-for-profits Commission

⁴ *Australian Communities 2020*, McCrindle

⁵ *Tax-deductible Giving in 2017-18*, Australian Centre for Philanthropy and Nonprofit Studies, Queensland University of Technology

⁶ *Benchmarking Industry Trends 2020*, IVE Group

⁷ *Public Attitudes to Bushfires Fundraising*, More Strategic

had one of the highest levels of people giving through social media. The rate of Aussies and Kiwis who had donated to a charity through Facebook grew from just 7% in 2018 to 48% in 2019.⁸

While the bushfires saw a massive outpouring of public generosity, the pandemic that has gripped Australia from March 2020 has profoundly affected the sector. Fundraisers could not hold community events or conduct face-to-face fundraising due to social distancing requirements. Yet charities were busier than ever as more people lost jobs and requested help.

In the third quarter of 2020, the *NAB Consumer Anxiety Index* fell slightly (to 57.0 vs 57.3 in Q2) and is now at similar levels to the same period last year. But people are still spending less on charitable donations throughout the year (spend on donations in Q3 was -19% in Q3, which at least rose from -24% in Q2).⁹

In April, wealth management experts JBWere predicted a 7% drop in giving in 2020, and an 11.9% drop in 2021, a contrast to the past trend of yearly increases of 5%. The wealth management company indicated giving may fall to 2012 levels.¹⁰

The impact of social distancing on a sector that relies heavily on events for fundraising has been troublesome, with an overall decline of 72% in events income since the start of the pandemic. Driven by that decline and softening of other fundraising channels, the expected decrease in revenue in the next year is more likely to be 15%, according to the *More Strategic Fundraising Futures* report.¹¹

Koda Capital predicted the impact of the bushfire donations might cushion the 2019-20 tax year, but 2020-21 will likely be tougher. However, the report also indicated there were signs that in the current crisis, trusts, foundations and governments would be more willing to support overheads to help charities keep the lights on.¹² Sophisticated funders understand the perilous situation charities find themselves in and how critical they are to society during and in the recovery from a crisis like the pandemic.

The 100-plus respondents of a Perpetual report into private and public ancillary funds and charitable trusts revealed that while their corpus had taken a hit, more than 50% of respondents would maintain current giving levels.¹³

At the same time, the *Fundraising Futures* study found that 61% of fundraisers reported better than expected income performance. The report suggested fundraisers are “resilient optimists” who had adapted quickly and felt more optimistic than they did when lockdown began. The coronavirus has also amplified trends that were already on the rise in fundraising: the shift to digital channels, development of virtual events and increased focus on supporter experience management. Some 60% of fundraisers have created emergency-style appeals to protect their mission delivery work, and 73% reported a healthy rise in support-centricity with increased communication and connection with supporters.¹⁴

Overall, the pandemic decimated events, while direct marketing was marginally up. Income from major donors and trust and foundations income was sustained. Corporates came to the aid for some organisations with revenue up overall. Gifts in Wills income was broadly down, but charities reported a significant increase in estates inquiries and increased notifications. There were also indications people were including a charity in their Wills.

⁸ *Global Trends in Giving*, Nonprofit Tech for Good

⁹ *Consumer Anxiety Index Q3*, NAB

¹⁰ *Where to From Here? The outlook for philanthropy during and post COVID-19*, JBWere

¹¹ *Fundraising Futures Report*, More Strategic

¹² *Crisis Giving Reflections & Observations for Fundraisers*, Koda Capital

¹³ *Private Ancillary Funds, Public Ancillary Funds and Private Charitable Trusts to the COVID-19 and Investment Returns: Implications for philanthropy and NFPs*, Perpetual

¹⁴ *Fundraising Futures Report*, More Strategic

However, fundraisers believe things will get worse before they improve, and 64% said the recovery would take two years or more.

For 2021, FIA recommends fundraisers continue to budget conservatively and regularly update forecasts as there is currently still too much uncertainty to be setting higher targets. It will also be critical to increase efforts around donor stewardship to ensure donors understand how much their support is needed and appreciated. FIA also advises investing in skills in digital fundraising to tap into the at-home audience and to manage donor supporter journeys for long-term success. Finally, FIA urges fundraisers to consider ways to boost and support individual and team wellbeing in these uncertain times.

FIA understands fundraisers will require support from all avenues in 2021. We will continue to provide tools, resources and best practice techniques for fundraisers, management teams and boards. For starters, we will assist in professional development with reduced pricing for the 2021 conference (to be held virtually). This will ensure fundraisers can obtain access to skills development at a time when organisations might reduce staff training. We will also continue to advocate for the reduction of red tape and the particular purpose and license the sector has for fundraising. Importantly, we aim to help our members meet the challenges of this ‘new world of fundraising’ as the pandemic slowly recedes from our shores.

Chair's Report

I am pleased to present FIA's 2020 annual report to members and the broader community. It has been a busy and challenging year for fundraisers.



Our members play a critical role in motivating and engaging the community to support some of the most vital causes in our society – many needed more than ever during the global pandemic. This year we have been inspired by both the passion and creativity of fundraisers in the face of unprecedented challenge, and by the generosity and commitment of donors and supporters.

While fundraisers have succeeded through recessions and environmental disasters before, the coronavirus pandemic brought new challenges through the unpredictability of lockdowns and social distancing. Over the past year, we have seen that organisations and fundraisers who have embraced change in an agile manner and remained focused on fundraising best practice have not only survived – but often thrived.

Through all of these challenges, FIA has been a lynchpin, advocating with the government on your behalf and providing real-time data, research and insights for fundraisers looking for a new path forward. FIA is the peak body for the charitable fundraising sector (which raised \$10.5 billion according to the latest ACNC report), representing fundraising professionals and suppliers.

Like so many of our members, we have also been affected by lockdowns, and restrictions impacting on our usual operations. Despite these challenges, we have continued to provide exemplary service to members. Our advocacy, professional development and opportunities to share knowledge and skills remain the way forward to help you be the best fundraiser possible and create maximum impact for your causes.

Our high-touch approach to the community has resulted in increased member engagement, record attendance and revenue for the 2020 conference as well as tangible results on the membership renewal front (1,143 members at last count). We have also created events, tools, resources and research to help members navigate the pandemic.

In 2020, we continued to enhance our work in professional development and identity for fundraisers. We have mapped out a strategy, featuring the development of new pathways in fundraising, and a new skills assessment developed by More Strategic based on the global skills and competency framework for a digital world. We will formally launch this initiative in 2021.

In the final year of our 2018-2020 strategic plan, we conducted numerous meetings with government officials, so that we continue to be an influencer in shaping the regulatory environment. I thank CEO Katherine Raskob for her increased advocacy to the government this year which has resulted in closer relationships with regulators. She is a respected voice in Canberra and around Australia on these matters.

The self-regulatory FIA Code continues to be the cornerstone of FIA's work and has been operational in its current format for three years. In 2020, we undertook a review and asked members for their feedback on how the Code is working to ensure it continues advancing best practice. We held member consultation roundtables via Zoom in November, with the Code to be updated to reflect the suggestions. Thanks to everyone who took the time to write a submission and attend the virtual roundtables.

Our efforts to promote Code compliance with the membership have been ongoing, under the guidance of the FIA Code Authority, the independent body that adjudicates on all Code-related

matters. Code Chair Ursula Stephens has resigned after three years in the role, and we warmly thank her for her service. We will announce her replacement in early 2021.

To ensure member compliance with the Code, our Code monitor conducted five rounds of mystery shopping, testing member responses in areas like treatment of people in vulnerable circumstances, telephone fundraising and communication preferences. We saw great results overall. And where there has been the need for better practice, we have informed CEOs and heads of fundraising so they can improve systems in their organisations as well as consider how additional training through our professional development program can assist. With constant regulator and media scrutiny, we must continue to focus on good governance, ethical practice and the tenets of the FIA Code.

While the Code continually guides members towards best-practice outcomes, the FIA Awards for Excellence in Fundraising provide a platform to highlight the sector's good work and the impact achieved for beneficiaries. The 2020 awards were revamped to keep their relevancy and proved to be a fantastic opportunity to highlight the most effective campaigns and to increase the profile of exceptional fundraisers, teams and volunteers. More than 500 attended the gala awards dinner, our biggest audience ever.

For the 2021 awards, we have made further refinements, including the introduction of a Best Pivot Campaign Award, apt for life in a pandemic. The Arthur Venn Award, a staple since 2012, has evolved into the Arthur Venn Lifetime Achievement Award, to reflect a person's lifetime of fundraising contribution and best practice. We have also introduced a new Fundraiser of the Year award. The 2021 awards were again free to enter thanks to the generous sponsorship of Mondial and Precision Fundraising. The new categories and free entry resulted in 173 entries, a massive increase on 2020. Our 2021 awards ceremony will be virtual but celebrated in COVID-safe state hubs. A shout-out to our 30+ judges who gave up their time to review submissions and debate their merits!

We were so excited to relaunch the FIA Foundation at FIA Conference 2020 in Brisbane with a new brand, thankfully just before the lockdown. The feedback was extremely positive. Thanks to Dalton Garland Blanchard for redeveloping the brand into something elegant and contemporary. The FIA Foundation exists to supply funds for education, training, leadership and sector research. In 2020, it commissioned QUT's Wendy Scaife and her team to undertake qualitative research for an executive-level advanced fundraising leadership course. They are now considering potential course topics and content arising from their national study. This work was possible thanks to a generous grant from a charitable gift left by Jim Weber FFIA.

Our outstanding state committees managed to hold a variety of in-person and mostly online events this year. Larger-scale events such as South Australia's Fundraising Showcase and Queensland's SuperBolt proceeded online successfully. Meanwhile, the NFP Forum in the Northern Territory delivered to a combination of in-person and online attendees. We also organised a limited number of in-person events in Queensland and Western Australia.

Most non-profits rely on volunteers, and FIA is no exception. We are blessed to count more than 200 people who give their time to the organisation. They ensure a sustainable future for FIA and help us to achieve our aims. We could not do what we do without their help.

The FIA Board comprises 12 hardworking volunteers, and I thank them all for their counsel in 2020. Three people must be singled out for special mention this year: Jennifer Doubell OAM FFIA CFRE; Marcus Bleas FFIA, and Trudi Mitchell FFIA, who complete their terms of service at the AGM in March 2021. Thank you for your invaluable governance and guidance over the years.

In closing, I thank the FIA staff who supply the best possible service to members. We are grateful to you for your hard work and commitment. It truly makes a difference.

Meredith Dwyer FFIA CFRE

CHAIR

Chief Executive's Report

There is no question that 2020 has been challenging. Thanks to the impact of coronavirus, our lives have dramatically changed. But at the same time, I have been buoyed by the deep engagement of our members, partners and suppliers, not to mention the generosity of Australians in supporting our members' work in unprecedented times.



January heralded a busy start to the year with the bushfire emergency relief fundraising making headlines across Australia. During that time, several media outlets interviewed me, and I appreciated the opportunity to discuss the amazing and impactful work of the sector. I also did a round of radio interviews, including participating on a panel on Radio National's show Sunday Extra, after the Royal Commission into National Natural Disaster Arrangements released their report in October.

Luckily, we held our conference before COVID-19 gripped Australia. The February event in Brisbane was an enormous success with 869 delegates. Delegate numbers surpassed previous conferences and budget expectations, and this, along with staunch support from sponsors and exhibitors, contributed to an excellent financial outcome. I thank the 2020 conference program committee led by Care International's Alice Anwar MFIA and our own conference team for their superb execution. With the situation in Melbourne uncertain at the time of planning, we decided to hold FIA Conference 2021 virtually. The 2021 theme is Change the way forward, emphasising how fundraising changes the world.

By mid-March, the coronavirus pandemic had affected FIA in several ways. The lockdown and economic downturn impacted our jobs service, education program and state committee events. Thanks to physical distancing requirements, our events and face-to-face courses had to move online. We also deferred hiring more staff and our planned technology upgrade in line with a quickly revised 2020 budget.

Significant cost cutting and hiring and pay freezes combined with the receipt of the government cashflow boost and Jobkeeper helped us achieve a positive financial result this year. Implementing these measures allowed FIA to keep current staffing levels and member service provision.

With vital income streams in decline, we had worried about membership, but one of the pleasant surprises of the year is that membership renewals have continued strongly. We implemented a high-touch engagement strategy not only to promote membership benefits but also to determine how we could help our members navigate the crisis through our support and services, including offering discounts for our courses. We currently have 1,143 individual and organisational members, and our membership committee is now planning significant changes to the membership structure for 2021-22.

In 2020, FIA and The Real Media Collective successfully negotiated with Australia Post for two concessions around Charity Mail to help our respective members during the COVID-19 recovery period. These concessions were a 10% postage rebate on incremental Charity Mail activity in the lead up to Christmas and postal relaxations in May. Our joint negotiations were a fine example of how working closely with industry, charities, and Australia Post can deliver meaningful results for members.

During the year, we held three meetings with senior fundraising members (informally called our 'Brains Trust') as well as three supplier forums and two events for small charity CEOs. We are developing actions from these meetings to improve member benefits, including specific professional

development. We also joined forces with the Public Fundraising Regulatory Association (PFRA) to create a data reference group to improve standards around consent and use of data in charitable fundraising organisations.

In May and June, we held our second FIA Essential Member Update series, to provide members with key updates on the sector and the work of FIA. We held six events via Zoom and had higher registrations than 2019, with 321 attendees across the country who were overwhelmingly positive about the series.

In regulatory affairs, we are on track to achieve the FIA Code self-regulatory goals outlined in our strategic plan (2018-2020). The membership is supportive of the FIA Code, and uptake of Code training is still strong (4,330 registrations/completions to date). In October, we released the first annual report by the Code Authority, which documents the activities of this independent body in ensuring members follow the Code. We also organised five rounds of Code mystery shopping to check on member compliance. While most fundraisers were doing the right thing, some fundraisers needed to improve their practice. Overwhelmingly, the CEOs and heads of fundraising I spoke with remain supportive of this oversight, knowing it will help boost trust and confidence in our sector.

December 2020 marked the end of the term of FIA Code Authority Chair, the Hon Ursula Stephens. Ursula was the inaugural chair of the Code Authority and steered the direction of this critical committee in the advancement of the Code. We are thankful for her smart and sensitive guidance over the past three years.

On the advocacy front, we wrote several submissions, including our first-ever federal budget submission. We also wrote to government pressing for harmonisation of fundraising regulation across Australia. In October, we released a new Code Practice Note on ethical fundraising for and during national disasters in response to the Royal Commission into National Natural Disaster Arrangements. We also argued against a private member's bill introduced by Senator Stirling Griff to remove the charity exemption from the Do Not Call Register.

Despite coronavirus wreaking havoc on aspects of our professional development program, the education department celebrated significant achievements. The national mentoring program is extremely popular, attracting 238 participants (mentors and mentees), up from 180 in 2019. We also created an online mentoring resource library for participants.

With social distance restrictions in place, we had to take our core education programs and short courses online. Interestingly, our student numbers increased by 78 per cent in the core courses. We had 203 students in 2020 compared to 114 in 2019, across the Certificate in Professional Fundraising, Diploma in Fundraising, Fundraising Essentials and Gifts in Wills Essentials. Online study proved an excellent way to increase regional enrolments and overall member engagement.

We also developed six new short courses this year. Our webinar in major gifts proved popular as did our new short course, Copywriting for Impact. Pleasingly, 17 CEOs and heads of fundraising took our recent strategic planning seminar. I thank our tutors for their excellent work under trying circumstances.

In 2020, we initiated member and community consultations to promote and increase diversity and inclusion in Australia's fundraising sector. The goal is to enable more people from diverse backgrounds to join our community. We plan to launch this strategy early in 2021.

Our seven state and territory committees also faced challenges during lockdown but soldiered on admirably. Before the pandemic, we held eight events across all states. We switched to online delivery of professional development and networking sessions from late March, hosting another 37 events up until the end of November. One upside: we could broadcast our virtual events nationally, allowing our state committees to market to a broader audience and with more exposure for speakers and sponsors.

Include a Charity, our social change movement, went ahead as planned in September with more than 90 charities involved. There were 162 media placements this year. While we naturally could not hold in-person events, our 2019 speaker Meg Abdy delivered an excellent webinar with updates to last year's Australian gifts in Wills study. I thank our advisory committee who lead the work to encourage more Australians to consider gifts in Wills and single out Roewen Wishart FFIA CFRE, who is completing his term as chair, for his service.

In closing, there are many people to thank for helping us to create a first-class membership organisation. I am grateful to FIA Board Chair Meredith Dwyer FFIA CFRE and the FIA Board of Directors for their invaluable guidance. FIA's work would not be possible without the generosity of Database Consultants Australia (DCA), IVE Group and Precision Fundraising, our national sponsors, as well as the many other organisations who support our work. I also thank the 200+ fantastic volunteers who organise FIA events locally or serve on one of our many advisory committees and special interest groups. Finally, a huge thanks to the FIA team; I could not have gotten through 2020 without their upbeat attitude, hard work and dedication!

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 2020 as audited by K S Black & Co.



SUMMARY OF THE FINANCIAL RESULTS

What a challenging, disruptive year of change this has been for everyone!

FIA commenced the last year of our 2018-2020 Strategic Plan with a hugely successful national conference which could not have been executed at a better time, finishing before the major onset of COVID-19 in Australia and the resulting lockdown of most of our population.

The impact of the pandemic on income began to emerge in March, with a significant drop in job advertising revenue quickly followed by a steep decline in face-to-face education course registrations.

In response, FIA implemented significant cost-cutting measures, including a hiring freeze and a freeze on staff salaries which, combined with the receipt of government stimulus measures, allowed us to maintain current staffing levels and the provision of services to members: it also enabled the development of a suite of online courses and resources in an effort to grow engagement with members. This helped to deliver a continued, though decreased, income stream from the education and state committee programs.

The significant work undertaken by the team and the board to reduce costs and reinvent member service provision combined with government stimulus has resulted in a surplus of \$227k.

These results would not be possible without the significant contribution of the 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. We could not achieve the levels of engagement without your valued input, advice and commitment.

OPERATING ENVIRONMENT

In the period 2012-2017, FIA worked to build reserves for future investment in line with the Strategic Plan. The period 2017-2019 saw FIA develop resources including around the FIA Code and staff to achieve the objectives of the Plan. The FIA Board were keen to return to a balanced budget in the 2020 financial year, and a surplus in 2021.

The impact of the global pandemic on operations forced significant cost cutting and the development of new ways of working to continue to deliver a high level of engagement, training and networking opportunities for our members.

The FIA staff are to be commended in developing and implementing a successful work-from-home plan with just one week's notice, and we are hugely grateful to our tutors, presenters, committee members and speakers who went above and beyond to redevelop their plans and provide revised programs online, which has increased attendees at training, networking and educational offerings to over 7,800 this year.

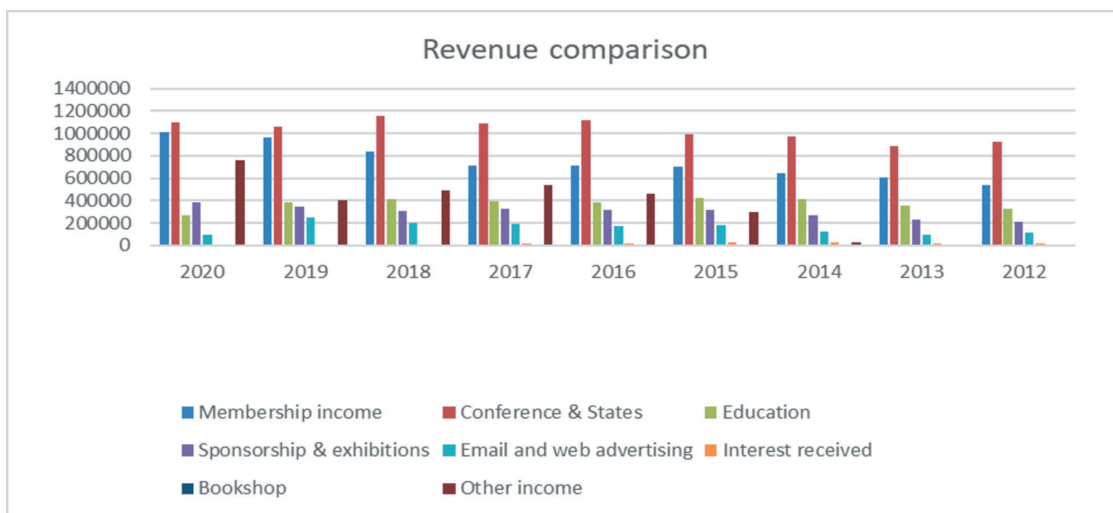
FIA has also been successful in embedding the Code course as a baseline expectation within the fundraising sector with over 4,330 participants to date.

At the same time as achieving these operational and strategic outcomes, FIA has been working towards the strategic and fiscal outcomes of growing income from membership. This has been achieved with growth of 7% in organisational membership while maintaining similar retention levels year on year. This is a significant achievement in such a difficult year and is testament to the high-touch strategy in both member engagement and Code redevelopment.

INCOME

Income for the year was \$3.6M (\$200k up on 2019 results). A 4.5% increase in membership income is a very successful sign in such a difficult year and combined with another successful conference and awards night in February 2020 acted to offset the significant decline in other income from advertising, training and education attendances caused by the pandemic. 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.

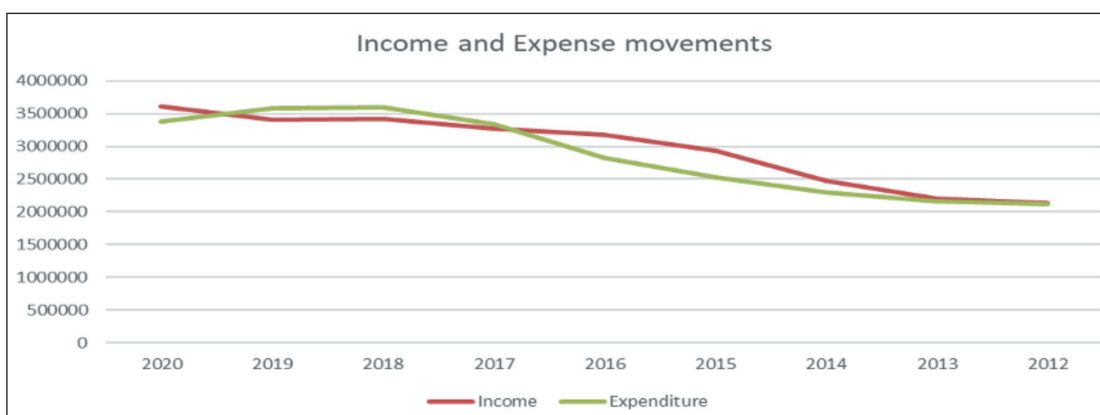
The chart below shows the income contribution from each revenue stream highlighting the weight of each key area of the business.



EXPENSES

Total expenses for the year were \$3.3M, a \$585k decrease on budget and \$200k down on last year; continued focus has been applied to reducing costs across all functions where possible.

The chart below shows the movement of total income and expenses from 2012 to 2020.



OUR FINANCIAL POSITION

The surplus of \$227k achieved this year will build reserves to \$925k which will stand us in good stead as we face the ongoing implications of the pandemic on the 2021 business environment. While the 2020 budget was cast to achieve a balanced budget, the significant decline in income caused by the global pandemic and offset by the reduction in expenses and receipt of government stimulus, there has been a net cash outflow of \$230k for the year reducing our cash position to \$1.98m at year end. This is sufficient to meet commitments and future needs.

FINANCE, AUDIT AND RISK COMMITTEE

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

Meredith Dwyer FFIA CFRE

Paul Flynn FFIA

Jim Hungerford MFIA

Joe Shannon B. Comm CA

So much has been achieved by the committee in 2020, from the support provided to FIA during this challenging year and the development of policy documents governing Financial Reserves, Risk and Cyber Security as well as a risk review matrix and implementing a schedule for board review of all business risks. The committee also called for an audit tender for the provision of ongoing services to FIA and I am pleased to say the board agreed with our recommendation to award the tender to our current provider K S Black and Co. This decision will be brought before the AGM for approval at the next meeting in March 2021.

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 2020.

Trudi Mitchell FFIA
HONORARY TREASURER

Regulatory and Policy Report 2020

REGULATORY REFORM

NSW LEADS IN EASING THE REGULATORY BURDEN ON CHARITABLE FUNDRAISING

In September 2020, the Morrison Government announced another significant step forward on harmonisation of fundraising regulation and red-tape reduction for the charitable sector, with the release of a discussion paper on a proposed cross-border recognition model.

The government has been working with the states and the ACT, led by NSW, on fast-tracking work on fundraising harmonisation.

The release of the discussion paper builds on work across jurisdictions to cut red tape for charities, including streamlining requirements for fundraising organisations with state reporting obligations, so charities are only required to report once to the Australian Charities and Not-for-profits Commission (ACNC) in participating jurisdictions. The paper also encourages the use of the ACNC's charity marketplace to reduce the requirement of charities to report to multiple regulators.

Under the cross-border recognition model, a charity already registered with the ACNC would be deemed to hold a local fundraising authority in each participating state or territory.

VICTORIA REFORMS

In August 2020, Victoria announced new reforms around charity reporting requirements. Where a charity is registered with the ACNC and intends to fundraise in Victoria, they can benefit from reduced reporting and renewal requirements.

Fundraisers already registered with Consumer Affairs Victoria can also benefit from these requirements.

All fundraisers that are registered charities will continue to have ongoing responsibilities to Consumer Affairs Victoria and the Victorian public.

WESTERN AUSTRALIA

Significant reforms are now in force which lifts some of the red tape burdens on WA charities, reducing their administration costs and resulting in more money being made available to charity recipients.

The changes to WA's *Charitable Collections Act* simplify the application process and reporting requirements while removing duplication of compliance for charities.

Charity licences under this new Act do not have an expiry date; as a result, they do not need to be renewed every three years as was the requirement previously. However, continuous licences are issued on the condition that the charity complies with annual reporting and other obligations.

An updated memorandum of understanding between Consumer Protection WA and the ACNC streamlines and reduces the regulatory burden on WA charities while allowing greater sharing of information and harmonisation between the two agencies.

From the 2020 financial year, most WA charities that are registered with the ACNC no longer need to submit annual financial statements to both agencies as the ACNC now shares that information and, if annual revenue is under \$250,000, the accounts do not need to be audited or reviewed.

REGULATORY TOOLS AND MEMBER SUPPORT

ETHICS AWARENESS MONTH

In October, FIA promoted Ethics Awareness Month, encouraging awareness of the FIA Code and its accompanying practice notes which address many of the ethical dilemmas fundraisers encounter in their work. These include how to deal with people in vulnerable circumstances, how beneficiaries are portrayed in fundraising appeals, and ensuring ethical behaviour in supply chains. We also publicised our training on ethical decisionmaking through our online Code course.

NEW PRACTICE NOTE FOR NATIONAL DISASTERS FUNDRAISING

FIA developed the first-of-its-kind Practice Note for Fundraising for and during National Disasters, which provides guidance for ethical best practice for fundraising in response to natural disasters in Australia.

The practice note was released in mid-October and provided guidance on the following areas of fundraising:

Accountability – FIA members and fundraising organisations are ultimately accountable to their donors.

Governance – FIA members and fundraising organisations should be registered with the ACNC and adhere to all state and/or territory fundraising regulations at all times.

Fundraising materials – pursuant to the FIA Code, all fundraising materials must be accurate, including clearly stating the specific purpose of each donation.

Outsourced fundraising activities – special provisions for fundraising activities that are undertaken by agencies and/or by the general public on behalf of charities, including provisions around the “Authority to Fundraise.”

All communications – fundraisers must take extra care and provide clarity around their appeals during times of emergencies, heightened emotions and generosity. Communications must spell out the nature of the fundraising, the likely impact, and the timing and delivery of the funds raised.

Reporting guidelines – FIA members and fundraising organisations should undertake to provide clear and accurate reporting on all fundraising activities and their impact. They should be prepared to report back at all times, including on demand from donors.

CHARITY MAIL SEASONAL SUPPORT REBATES

In 2020, FIA and Australia Post worked together on a temporary rebate for qualified Charity Mail campaigns to support fundraisers in the lead up to the busy Christmas appeal time as well as for the end of financial year appeals and campaigns.

Charities received a postage rebate of 10% for any incremental Charity Mail activity undertaken from 1 October to 30 December 2020 compared to the same period in 2019. The changes were devised to assist charities with their fundraising efforts and encourage them to undertake additional mailing activity to help supplement donation income.

CHEQUES

FIA and AusPayNet worked together on guidance for members regarding the issue of the longevity of cheques as a form of continuing currency in Australia. Discussions have been held around the likelihood of a possible phase-out. However, there is no date confirmed by the Australian Competition and Consumer Commission about when a possible cheques phase-out could occur. FIA and AusPayNet will hold further discussions in 2021 with their respective members.

PRE-BUDGET SUBMISSION

In this submission, FIA recommended that:

1. The Commonwealth Government play a more significant leadership role in ensuring harmonisation of state-based fundraising regulation by the end of 2020.
2. A digital grants fund be established to assist charities and fundraising organisations in meeting the demands of the new digital economy before 30 June 2021.
3. The Australian Communication and Media Authority (ACMA) be given powers to 'shut down' and take civil action against fake digital fundraising sites.
4. A charity tax deduction incentive for Australian taxpayers providing a 150% or greater tax deduction on donations before 30 June 2021 be created.
5. A tax offset for companies who donate with incentives based on corporate size and donation value be offered.

FIA CODE AUTHORITY

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 2017 following a year-long, comprehensive review into sector sustainability by an FIA-led taskforce. The review resulted in significant reforms to protect people in vulnerable circumstances, reduce the risk of over-communicating with donors and improve governance and supply chain accountability, among other changes. Training in Code compliance by all fundraisers became mandatory for FIA members in 2018. 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, and promotes Code awareness through training. Occasionally, it also makes recommendations to the FIA Board for improvements to sector self-regulation.

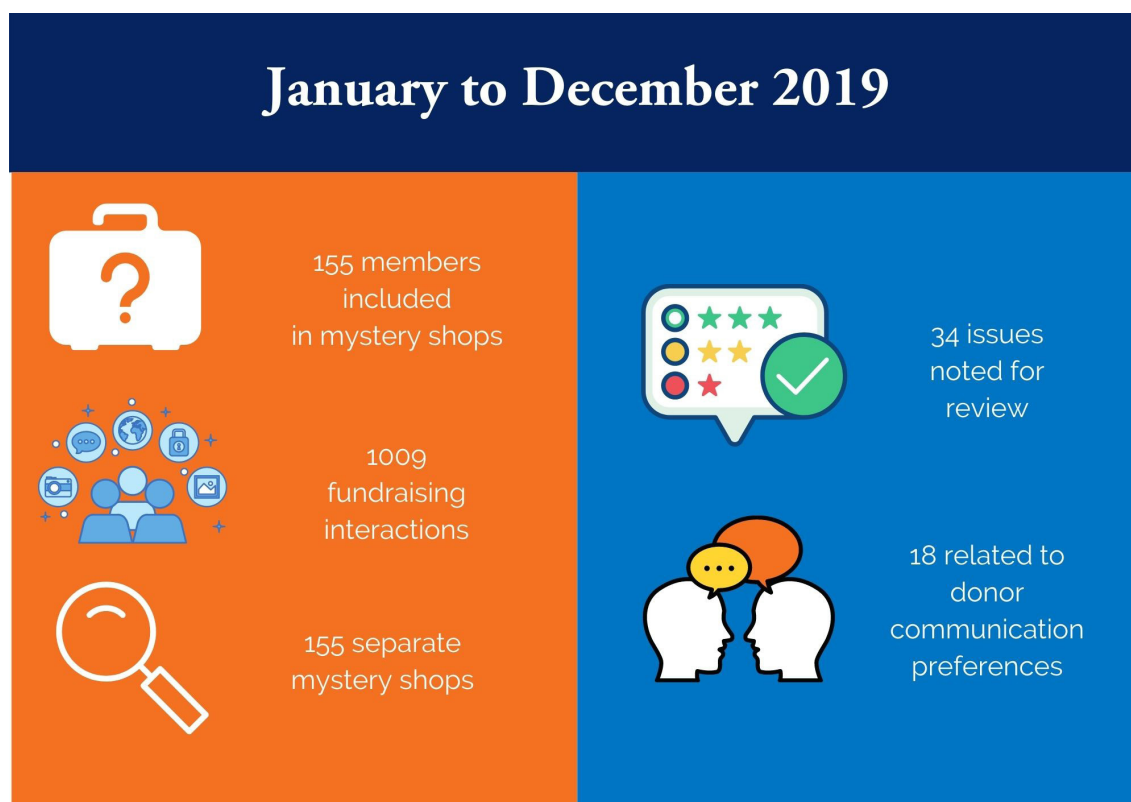
The Code Authority has a variety of options available in cases where a member has been found in breach, ranging from requiring the member to undertake Code training, make an apology, or

conduct other remedial action to ensure the breach does not happen again. In cases of repeated non-compliance, the authority can recommend to the board that the member be suspended or expelled from the membership.

In 2020, the Code Authority continued to commission mystery shopping of FIA members, including supplier members, on issues that were raised as the result of complaints and from its mystery shopping activity, in keeping with its remit to lift standards of ethical, best-practice fundraising in Australia.



During the first half of 2020, the FIA Code Monitor completed one round of mystery shopping on telephone fundraising interactions.



CODE AUTHORITY MEMBERS, APPOINTMENTS AND TERMS

Position	Name	Appointed	Status	Term Number	Term Completes on
Chair	Ursula Stephens	3 Nov 17	Resigned	2	Nov 21
Board representative	Jennifer Doubell	3 Nov 17	Current	2	Dec 21
FIA member representative	Roewen Wishart	3 Nov 17	Current	2	Nov 21
Professional member representative	Benjamin Cox	3 Nov 17	Current	2	Nov 21
Board appointed member	Christopher Zinn	30 Oct 18	Current	1	Oct 20
Board appointed member	Ashley Rose	30 Nov 19	Current	1	Nov 21
Board appointed member	Karen Shields	1 June 20	Current	1	June 22
Deputy chair	Sue-Anne Wallace	3 Nov 17	Resigned	N/A	28 Feb 19

In 2020, the FIA Code Authority appointed two new members:

- Karen Shields, Director of Individual Giving at the Great Barrier Reef Foundation

CODE AUTHORITY MEMBERS, ATTENDANCE

Position	Name	Total Attended	Total Applicable	CA Meeting Date					
				20 Feb 2020	6 May 2020	17 Jun 2020	23 Jul 2020	15 Oct 2020	4 Nov 2020
Chair	Ursula Stephens	5	6	✓	✓	✓	✓	✓	✗
Board representative	Jennifer Doubell	6	6	✓	✓	✓	✓	✓	✓
FIA member representative	Roewen Wishart	6	6	✓	✓	✓	✓	✓	✓
Professional member representative	Benjamin Cox	6	6	✓	✓	✓	✓	✓	✓
Board appointed member	Christopher Zinn	5	6	✗	✓	✓	✓	✓	✓
Board appointed member	Ashley Rose	6	6	✓	✓	✓	✓	✓	✓
Board appointed member	Karen Shields	3	3	✗	✗	✗	✓	✓	✓

CODE REVIEW

At its May 2020 meeting, the FIA Code Authority requested a review of the FIA Code to ensure that the Code continues to reflect the community, fundraising sector and self-regulatory standards and values. The review also examined the need for additional member training in the Code. Additionally, it investigated the ongoing role of the Code Authority in ensuring adherence to best practice, ethical fundraising via the FIA Code.

FIA is committed to promoting the interests of the fundraising sector by assisting members to abide by accepted standards and engage in behaviour that will enhance the reputation and continuously maintain the integrity of the sector.

FIA established working groups to consider further and develop a roadmap of recommendations and timings.

The outcome of the review will be announced in early 2021.

COMPLAINTS 2020

COMPLAINTS AGAINST FIA MEMBERS:

- Complaint 2001 - February 2020
 - A complainant contacted FIA regarding the conduct of a member organisation's managing director which they felt was unethical.
- Complaint 2002
 - A complainant contacted FIA after multiple requests for no further contact from a member organisation had not been actioned.
- Complaint 2003
 - The Code Authority initiated an investigation after a charity did not disclose the source (a rented list) of the mystery shopper's contact details.
- Complaint 2004
 - A complainant contacted FIA because they could not contact a supplier member regarding an unsubscribe from all further communication.
- Complaint 2005 - 20 Feb 2020
 - The Code Authority initiated an investigation after a charity did not comply with the mystery shopper's refusal to donate.
- Complaint 2006 - 20 Feb 2020
 - The Code Authority initiated an investigation after a charity did not comply with the mystery shopper's request to opt out of communications.
- Complaint 2007 - May 2020
 - A complainant contacted FIA about a member organisation's lottery campaign believing their promotion on Facebook was unethical.

- Complaint 2008 - June 2020
 - o The complainant contacted FIA and advised they were receiving copious amounts of mail from multiple charities and asked what they could do to stop.
- Complaint 2009 - June 2020
 - o The complainant contacted FIA because a member charity had personal information about them that they did not want the charity to have.
- Complaint 2010 - June/July 2020
 - o The complainant called FIA because they no longer wanted to be contacted by charities.
- Complaint 2012 – 27 July 2020
 - o The complainant contacted FIA because they were unable to contact a charity member directly to remove their name from a mailing list.
- Complaint 2013
 - o The complainant contacted FIA to question the credentials of a face-to face fundraiser and to request no further contact from the charity.
- Complaint 2014
 - o The complainant contacted FIA to express disappointment after a face-to-face interaction with a fundraiser.
- Complaint 2015
 - o The complainant contacted FIA because their contact details had been shared without their consent.
- Complaint 2016
 - o The complainant called FIA because they were receiving charity calls after asking to be removed from a contact list.
- Complaint 2017
 - o The complainant contacted FIA because they could not contact a charity member.

The FIA Code Authority worked with each member to satisfactorily resolve all complaints including through the FIA CEO and FIA staff.

COMPLAINTS AGAINST NON-MEMBER ORGANISATIONS:

- Non-member complaint 2001
 - o The complainant contacted FIA regarding a charity, not a member of FIA, who the complainant felt had discriminated against them.
- Non-member complaint 2002
 - o Complainant contacted FIA asking for information on a charity.
- Non-member complaint 2003 – Horses for Harmony
 - o Multiple complainants contacted FIA about an animal charity lottery suggesting they are unethical in their lottery campaigns

- Non-member complaint 2004
 - A complainant contacted FIA asking if a call they had received was from a legitimate charity.
- Non-member complaint 2005
 - A complainant contacted FIA about opting out of a non-member charity lottery.
- Non-member complaint 2006
 - Complainant contacted FIA about a charity running a lottery.

In the case of complaints against non-members, FIA routinely direct complainants to the Australian Charities and Not for Profits Commission or their local police.

FIA SUBMISSIONS AND ADVOCACY EFFORTS

In 2020, FIA submissions and advocacy efforts included the following:

Activity	Name
Advocacy	Mail Rebate
Advocacy	Cheques (AusPayNet)
Submission	Royal Commission into National Natural Disaster Arrangements
Submission	Digital Platforms Inquiry
Submission	Consumer Affairs Victoria Fundraising Regulations 2009 Remake
Submission	Cross-jurisdictional Border Submission
Submission	Telecommunications Legislation (Unsolicited Communications) Bill 2019 Senate Standing Committee on Environment and Communications Legislation Committee Inquiry (Griff Bill)
Submission	2020 Review into the 1988 Privacy Act
Submission	NSW Charitable Fundraising Act 2020
Senate Committee	Digital Platforms Inquiry
Letter	Coronavirus Impact Letters
Submission	Streamlining of Licensing Laws in States and Territories
Submission	Pre-Budget Submission
Advocacy	A bonus charity tax deduction incentive for Australian taxpayers providing a 150% or higher tax deduction on donations before 30 June
Advocacy	A tax offset for companies who donate with incentives based on corporate size and donation value.
Advocacy	Removal of the onerous ted tape that takes both human and financial resources from charities.
Research/Survey	Public Attitudes to Giving in the Pandemic

Membership

As at 31 December, FIA had 1,143 Members and 123 New Member organisations from Jan – Dec 2020, compared to 1,151 the previous year.

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 2020

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	Maurice Henderson FFIA FAHP CFRE
Ross Anderson FFIA	Sharon Hillman FFIA
Leanne Angel FFIA CFRE	Mark Hindle FFIA FAHP CFRE
Karen Armstrong FFIA CFRE	Brian Holmes FFIA CFRE
Chris Benaud FFIA CFRE	Tanya Hundloe FFIA CFRE
Dyls Bertelsen FFIA	Jannine Jackson FFIA CFRE
Jock Beveridge FFIA	Vicki James FFIA
Marcus Blease FFIA	Katherine John FFIA
Leigh Cleave FFIA CFRE	Darrin Johnson FFIA
Gavin Coopey FFIA	Diane Kargas Bray AM FFIA
Benjamin Cox FFIA	Zoe Karkas FFIA
Bianca Crocker FFIA CFRE	Clare MacAdam FFIA CFRE
Kerry Cutting FFIA CFRE	Stephen Mally FFIA CFRE
Peter Dalton FFIA CFRE	Jeremy Maxwell FFIA CFRE
Elizabeth Davis FFIA CFRE	Lindsay May OAM FFIA CFRE
Vicky Dodds FFIA	Tracy McNamara FFIA
Jennifer Doubell OAM FFIA CFRE	Trudi Mitchell FFIA
Meredith Dwyer FFIA CFRE	Shanthini Naidoo FFIA CFRE
Jackie Evans FFIA CFRE	Leo Orland FFIA CFRE
Ron Fairchild FFIA CFRE	Martin Paul FFIA
Paul Flynn FFIA	Heiko Plange-Korndoerfer FFIA CFRE
Judith Ford FFIA CFRE	Mark Quigley FFIA
James Garland FFIA CFRE	Vicki Rasmussen FFIA CFRE
Jo Garner FFIA CFRE	Lesley Ray FFIA CFRE
Allan Godfrey FFIA	Christine Roberts FFIA
Craige Gravestain FFIA CFRE	Andrew Sabatino FFIA
Nigel Harris FFIA CFRE	Wendy Scaife FFIA
Rebecca Hazell FFIA CFRE	Margaret Scott FFIA CFRE

Richard Sillett FFIA
Bec Stott FFIA
Pamela Sutton-Legaud FFIA CFRE
Damian Topp FFIA
Barbara Ward FFIA
Alicia Watson OAM FFIA CFRE

Kerin Welford FFIA CFRE
Nola Wilmot FFIA
Roewen Wishart FFIA CFRE
Carl Young FFIA CFRE
Savas (Vic) Zacharias FFIA

EMERITUS MEMBERS AS AT 31 DECEMBER 2020

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

Margaret Armstrong FFIA (Emeritus)	Anne Gribbin FFIA (Emeritus) CFRE
Graeme Bradshaw FFIA (Emeritus) CFRE	Kenneth Harrison FFIA (Emeritus)
Gail Breen FFIA (Emeritus)	Margaret Haydon FFIA (Emeritus)
Lyn Buckley FFIA (Emeritus)	Jenny Marchionni MFIA (Emeritus)
Jennie Cameron MFIA (Emeritus)	Graham McKern FFIA (Emeritus)
Peter Castleton FFIA (Emeritus)	Brian O'Keefe FFIA (Emeritus)
Diane Clark FFIA (Emeritus)	Dennis O'Reilly FFIA (Emeritus)
Ray Crompton MFIA (Emeritus)	David Rose FFIA (Emeritus)
Ron Ellis OAM FFIA (Emeritus)	John Townend FFIA (Emeritus)
Raymond Fewell FFIA (Emeritus)	Michelle Trevorrow FFIA (Emeritus)
Ted Flack FFIA (Emeritus)	Rosemary Wilcox FFIA (Emeritus)
Peter Fletcher FFIA (Emeritus)	Bruno Yvanovich FFIA (Emeritus)
Paul Freeman FFIA (Emeritus)	

HONORARY MEMBERS AS AT 31 DECEMBER 2020

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.

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

Professional Development

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

FIA's Education and Professional Development Programs allow participants to advance their skills, consolidate existing knowledge and obtain new information in specialised areas of fundraising. Students can also hone their leadership and management abilities and engage in lifelong learning with quality outcomes that improve their results and drives their career forward. FIA is also a partner organisation with CFRE International, and all our courses offer CFRE CE points towards Certified Fund Raising Executive certification.

This year we faced the unprecedented challenge of having to move all our educational offerings online into tutor-led virtual professional development classes in response to the restrictions that COVID-19 imposed upon us all. In April and May, we converted 16 courses from a face-to-face format to online delivery. By taking the online approach, we achieved a national reach for all FIA courses offered, including regional areas of Australia. An impressive 299 fundraisers engaged with our tutor-led online short courses from May onwards.

As a result of all FIA educational offerings being accessible online, we maintained participation rates in our courses nationally this year, and we also saw a slight increase in numbers with a total of 635 students enrolled across the country. FIA's National Mentoring Program also did well, increasing participation rates with a total of 240 participants – 120 mentees matched with 120 mentors. Many of our mentors returned from the 2019 program to give back to their profession again this year. FIA is proud that so many of our committed fundraising professionals are mentoring the future generation of fundraising leaders.

FIA's four core education courses continued to perform well, with many fundraisers taking advantage of online self-paced delivery to upskill during pandemic lockdowns. FIA also introduced half-day short courses at lower price points, and these were well-received by members. These new formats introduced halfway through the year attracted 132 fundraisers.

In other initiatives, we formed a diversity, equity and inclusion working group, led by a group of 'instigators'. Using a Design Thinking 'Double Diamond' Process Model and Purpose to Practice Model, they developed a consultative process that has the aim of increasing diversity and inclusion in the fundraising profession in Australia by enabling and supporting fundraisers from many different backgrounds, perspectives and experiences. FIA also partnered with Ducere Global Business School to conduct an academic research project into emerging issues in fundraising. This collaboration resulted in a research paper on *Blockchain and Cryptocurrency in the Charitable Sector*, and evaluation tools for members which will be released in early 2021.

FIA continues to enhance its professional development and education program to provide for professional fundraisers at all levels. Entry-level courses are created for fundraisers with limited knowledge of a topic area. Intermediate-level courses are for those with some understanding of a subject area who would like to extend their skills, while advanced-level courses are for those people with significant experience who are keen to take their fundraising practice to the next level.

FIA would like to thank all contributors and tutors who provided their expertise for the 2020 education and professional development program, and this year, at very short notice, delivered stimulating and engaging educational experiences online.

CORE EDUCATION PROGRAM

These tutors provide training in Fundraising Essentials, Certificate in Professional Fundraising or Diploma in Professional Fundraising.

- **Maisa Lopes Gomes de Paiva EMFIA**
Head of Digital Fundraising
Cerebral Palsy Alliance.
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Francesca Cinelli EMFIA CFRE**
Fundraising Manager
Wesley Mission.
Courses: Fundraising Essentials, Navigating the Fundraising Regulatory Environment
- **Bianca Crocker FFIA CFRE**
Community Change Architect
Fish Community Solutions.
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Leanne Dib MFIA**
Chief Executive Officer
St George and Sutherland Medical Research Foundation.
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Heiko Heiko Plange-Korndoerfer FFIA CFRE**
Head of Fundraising, Perth Children's Hospital Foundation.
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Rebecca Miller EMFIA**
Strategic Fundraising Manager
South Australian Health and Medical Research Institute.
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Angela Motta MFIA**
Individual Giving Manager
Variety – The Children's Charity Queensland.
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Margaret Scott FFIA CFRE**
Fundraising Consultant and Director, PhD Candidate (QUT)
Margaret Scott & Associates.
Course: Diploma in Professional Fundraising
- **Chris Benaud FFIA CFRE**
Development Manager
The Buttery.
Course: Diploma in Professional Fundraising

SHORT COURSE PROGRAM

- **Frank Chamberlin EMFIA**
Owner and Copywriter, Action Words.
Course: Copywriting Essentials
- **Mary Anne Plummer MFIA**
Creative Director, Exuberance.
Course: Copywriting for Impact
- **Mike Zeederberg**
Managing Director, Zuni.
Course: Donor Journey Mapping
- **Richard Harris**
Account Director, Certus Solutions Limited.
Course: Safeguarding Donor Privacy and Data
- **Karl Tischler MFIA**
Founder and Idealist, Marlin Communications.
Course: How to Create Distinctive Materials for your Gift in Wills Program
- **Martin Paul FFIA**
Director, More Strategic.
Course: Strategic Planning for Fundraising
- **Karen Armstrong FFIA CFRE**
Director, More Impact.
Course: Transforming Engagement – How to Personalise the Supporter Experience
- **Ruth Wicks MFIA**
Senior Consultant, More Growth.
Course: Mid-Value Donors
- **Maisa Lopes Gomes de Paiva EMFIA**
Head of Digital Fundraising, Cerebral Palsy Alliance.
Course: Creating a Digital-First Fundraising Strategy
- **Will Cordukes and Alexandra Cordukes MFIA**
Directors, Laundry Lane Productions.
Courses: Understanding the Video Production Process for Fundraising, Optimising Fundraising Video Communication and Marketing, Making a Video Project Using a Smartphone
- **Luke Edwards MFIA**
Director, Elevate Fundraising.
Course: Digital Fundraising Acquisition, Retention and Conversion
- **Stephen Rowe**
Prospect Research and Briefing Manager, Australian National University.
Webinar: Prospect Research – Who needs it?
- **Emilie Treuillard**
Director Global Philanthropy, Faircom New York.
Webinar: Major Gifts Fundraising – Navigating the Challenges of COVID-19 and Beyond
- **Leanne Warner**
General Manager Consulting, The Langley Group.
Webinar: Thriving in Times of Change – A Guide to Surviving as a Fundraiser

DIVERSITY, EQUITY AND INCLUSION WORKING GROUP

- Alan White MFIA CFRE, Head of Fundraising, Asylum Seeker Resource Centre
- Alexis Wolfe, Senior Manager, Supporter Acquisition & Retention, Mission Australia
- Brad Watson MFIA, Public Relations Secretary – Tasmania Division, The Salvation Army
- Christine Campbell, Head of Fundraising, Odyssey House NSW
- Deena Youssif, Philanthropy Manager, The Smith Family
- Erica Myers-Tattersall MFIA, Chief Provocateur, Xponential Fundraising
- Gavin Coopey FFIA, Director, More Strategic
- Grainne Tierney, State Manager NSW, Camp Quality
- Karina Rottinger MFIA, Head of Client Services, Public Outreach Consultancy Australia
- Katherine Graham, Managing Director, Public Outreach Consultancy Australia
- Karen McGrath MFIA, Founder, Starling
- Luanne Wishart, Philanthropy Manager QLD, The Smith Family
- Maisa Lopes Gomes de Paiva EMFIA, Head of Digital Fundraising, Cerebral Palsy Alliance
- Marloous Teh, Partnerships Executive, Lifeline Australia
- Rebecca Linigen, Principal Consultant, Long Story Short Fundraising and Communications
- Susan Williams CFRE, Director of Philanthropy, St Vincent's Curran Foundation

ACADEMIC RESEARCH

- Karl Uhrich
Fundraising Products, Acquisition and Loyalty
Australian Red Cross
- MBA Research Team – Ducere Global Business School
Torrens University Australia

EDUCATION VENUE PARTNERS

Throughout the year our venue partners are vital to the success of our education and professional development program. We would like to extend our warmest thanks for their generous support and contribution to the sector in hosting the delivery of FIA courses.

Our host venues

- Beaumont People, New South Wales
- Guide Dogs SA/NT, South Australia
- Legacy Australia, New South Wales
- Melbourne Legacy, Victoria
- QIMR Berghofer Medical Research Institute, Queensland
- Ronald McDonald House Charities, Western Australia
- Surf Life Saving, Western Australia
- VMCH, Victoria

SCHOLARSHIPS

In 2020, FIA was able to offer scholarships to members through the generous support of **BMS Group** and **Fish Community Solutions**.

BMS SCHOLARSHIP

The BMS Scholarship is provided to support the continuing professional development of the future leaders of fundraising. It enables one fundraiser each year to undertake the FIA Diploma in Professional Fundraising. This scholarship is open to current individual members or staff of organisational members of FIA who have a minimum of three years' experience in professional fundraising. The 2020 scholarship recipient was **Denise Lumsden MFIA**, Acting Chief Executive Officer, Ronald McDonald House Charities North Australia.

FISH COMMUNITY SOLUTIONS SCHOLARSHIP

The Fish Community Solutions Scholarship was offered again in 2020 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 **Novela Corda**, Co-founder, Key into Australia. After her own experience and challenges as a migrant in a new country, Novela established Key into Australia, a non-profit supporting newly arrived migrant women. This growing organisation supports women experiencing isolation and loneliness and helps develop a sense of belonging to the community.

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 provides 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 both mentors and mentees, so whether you want to contribute to the sector, or you want to grow your knowledge and skills, the program can help you get where you want to go in your career.

In 2019 the program was reconfigured and developed as a national offering. There is an annual cohort and in 2019-2020 93 mentoring relationships were formed.

CERTIFIED FUND RAISING EXECUTIVES (CFRE)

The CFRE credential is a professional achievement that sets standards in fundraising and is recognised worldwide. FIA encourages fundraisers to strive for, achieve and maintain this certification which recognises mastery in fundraising practice and commitment to the fundraising profession. Many FIA members have chosen to extend their education and qualifications with this accreditation. In 2020, 82 of the 105 CFREs in Australia were also committed FIA members. FIA would like to acknowledge these individuals for their dedication to their fundraising and non-profit careers.

FIA Conference 2020

**BEFORE
THERE WAS
A CURE
THERE WAS A
CAMPAIGN**



The FIA 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 the Asia-Pacific region.

FIA Conference 2020 was an amazing success, held at the Brisbane Convention and Exhibition Centre from 26 - 28 February. A huge thank you to our committee, supporters and speakers who worked on FIA Conference 2020.

FIA CONFERENCE PROGRAM COMMITTEE

We would like to say thank you to the 2020 FIA Conference Program Committee for all their hard work and dedication.

Alice Anwar MFIA, CARE (chair)

Ross Anderson FFIA, Alfred Health Foundation (co-chair)

Alex Struthers MFIA, Leukaemia Foundation

Raquel Dillon MFIA, Foodbank South Australia

James Watkins MFIA, Donor Republic

Christine Anderson MFIA CFRE, Variety QLD

Claire Hughes MFIA CFRE, MS Qld

Scott Nicholson, Make-A-Wish Australia

Erica Larke-Ewing MFIA, Cancer Council TAS

Kristine Pillai MFIA, International Women's Development Agency

Ruth Wicks MFIA, More Strategic

Ben Littlejohn MFIA, Act for Peace

Leila Davis, Taronga Conservation Society

Fiona McPhee, Moceanic

Andy Grant MFIA, Sacred Heart Mission



FIA CONFERENCE SUPPORTERS

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by OSKY

STRATEGIC GRANTS *HomeMade*

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FIA CONFERENCE SPEAKERS

Alexandra Growden	Gerry Wilde	Meredith Dwyer FFIA CFRE
Alexis Escavy	Gillian Bent	Mide Akerewusi
Allison Howell Quinton CFRE	Greg Potent	Nicola Kaufman
Andrew Martin	Greg McGahan	Nicola Norris MFIA
Andy Davis	Harriett Carter MFIA	Nicole Lovelock
Andy Tidy MFIA	Heather Hill CNM CFRE	Nigel Harris FFIA CFRE
Ann Ronning MFIA	Ian MacQuillin	Olivia Jary
Annabelle Chauncy OAM	Jakki Travers MFIA	Paige Gibbs MFIA
Bec Stott FFIA	Jennifer Doubell OAM FFIA CFRE	Penelope Sinton
Belinda Dimovski	Jennifer Shailer	Penny Tribe
Ben Holgate MFIA	Jo Garner FFIA CFRE	Rachael Lance MFIA
Ben Littlejohn MFIA	Jo Sneddon	Rochelle Nolan
Benjamin Cox FFIA	Jonathon Storey	Roewen Wishart FFIA CFRE
Beth Cross	Jonathon Grapsas	Rose Young
Bill Maddock MFIA	Julie Mullen MFIA CFRE	Ross Anderson FFIA
Bruce Nean	Katherine Ash MFIA	Rowan Foster MFIA
Cara Morrison MFIA CFRE	Katherine Raskob	Ruth Knight
Chantel Plum	Kaz McGrath MFIA	Ruth Wicks MFIA
Chris Zhong	Kelly Nicholls	Ruthann Richardson MFIA
Christina Hoey CFRE	Kelly McAuliffe	Sally Foley-Lewis
Claire Baxter MFIA	Ken Burnett	Scott Nicholson
Claire Hughes MFIA CFRE	Kristi Mansfield	Sean Murray
Craige Gravestain FFIA CFRE	Lauren McDermott MFIA	Sean Triner
Damian Topp EMFIA FFIA	Ligia Pena	Simone Owens
Dan Geaves MFIA	Lisa Kastaniotis CFRE	Stephanie Hart
Dr. Daniel McDiarmid FFIA	Lizzie Borwick MFIA	Stephen Thomas CFRE
Duncan Barker MFIA	Lorelle Silveira	Susan Williams
Elizabeth Grady MFIA	Louise Baxter	Tasman Cassim
Ellaine Hislop EMFIA CFRE	Louise Healy	Tim Paris
Erin Hamalainen	Luke Edwards MFIA	Tim Sadler MFIA
Erin McCabe	Maisa Lopes Gomes De Paiva EMFIA	Tom Duggan CFRE
Erin Kiely MFIA	Marcus Blease FFIA	Vanessa Byrne
Esther Kwaku	Mark Quigley FFIA	Wayne Sampson
Gavin Coopey FFIA	Martin Paul FFIA	Wendy Farrow



FIA Awards for Excellence in Fundraising 2020

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 2020 judges for their time and effort.

NATIONAL

NATIONAL JUDGING PANEL 1:

Arthur Venn

Most Outstanding Project

(judged from winners of awards 1-6)

Judges

Allan Godfrey FFIA, Royal Life Saving Society WA

James Garland FFIA CFRE, Dalton Garland Blanchard

Nicci Dent MFIA, Heart Research Australia

Jo-Anne Reeves MFIA, Parkinson's NSW

NATIONAL JUDGING PANEL 2:

National winners for:

Young Fundraiser of the Year

Volunteer of the Year

Fundraising Team of the Year

Judges

Benjamin Cox FFIA, Gold Coast Hospital Foundation

Katherine Raskob, FIA

Meredith Dwyer FFIA CFRE, HomeMade Digital

Janine Kewming MFIA, The Salvation Army

CAMPAIGN CATEGORIES

PANEL 1:

1. Most innovative campaign

7. Supplier Team of the Year

2. Best supporter experience

Judges

Alan White MFIA CFRE,

Asylum Seeker Resource Centre

Vicki Rasmussen FFIA CFRE,

Charlies Foundation for Research

Helen Falla MFIA,

Canberra Hospital Foundation

Helen Wright MFIA, Taronga

Conservation Society Australia

PANEL 2:

6. Impact through events

4. Impact on a shoestring

Judges

Rachel Murphy MFIA,

Heart Foundation

John Burns MFIA,

Plan International Australia

Lee White, Starlight

Nadia Lindop MFIA,

MJD Foundation

PANEL 3:

5. Best strategic partnership

3. Fundraising impact through creativity

Judges

Lucy Jacka MFIA,

Cerebral Palsy Alliance

Kim Sutton CFRE,

Life Flight Foundation

Darrin Johnson FFIA,

Royal Society for the Blind

Hazel Grunwaldt EMFIA,

University of Western Australia

STATE JUDGES

South Australia

Rebecca Miller EMFIA, SAHMRI
Cassie Magin EMFIA,
The Hospital Research Foundation
Simon Matthias,
Charles Darwin University

Queensland

Vicki James FFIA,
Gold Coast Hospital Foundation
Christine Anderson MFIA CFRE,
Variety - QLD
Victoria Andrews MFIA CFRE, MS Queensland
Abby Clemence Infinity Sponsorship

NSW

Tessa Irwin EMFIA CFRE,
Museum of Applied Arts and Sciences
Stephen Mally FFIA CFRE, FundraisingForce
Anthea Cohen MFIA, GoFundraise Pty Ltd
Julie Johnson EMFIA,
OKP Philanthropy & Marketing
Maisa Lopes Gomes De Paiva EMFIA,
Cerebral Palsy Alliance
Elizabeth Phegan MFIA, Mary Mackillop Today
Karl Tischler MFIA, Marlin Communications

Tasmania

Cath Adams MFIA,
Tasmanian Symphony Orchestra
Brad Watson MFIA, The Salvation Army

WA

Vicki Rasmussen FFIA CFRE,
Charlies Foundation for Research
Allan Godfrey FFIA, Royal Life Saving Society WA
Vicky Dodds FFIA, Vicky Dodds Consulting
Lyn-Marie Hegarty (Ret.)

ACT

Hilde Schneider MFIA,
Canberra Hospital Foundation
Diane Kargas Bray FFIA AM,
Diane Kargas Consulting
Judy Ford FFIA CFRE, Heart Support Australia
Alicia Edwards MFIA,
Community First Development Limited

2020 CAMPAIGN AWARDS

MOST INNOVATIVE CAMPAIGN

Winner

UNICEF Australia

We are the Generation Gifts in Wills Campaign

Finalists

Australian Red Cross

Red Cross Calling Re-imagined

Starlight Children's Foundation

Starlight's Super Swim

Christ Church Grammar School

The Students' Scholarship - by the boys, for the boys

Guide Dogs Victoria

Guide Dogs Victoria's Future Bound Giving Capital Campaign

BEST SUPPORTER EXPERIENCE

Winner

Peter MacCallum Cancer Foundation

A robot, a donor, a matched gift and a life saved

Finalist

Australian Red Cross

Getting To Know our Regular Supporters

MS Queensland

MS Brissie to the Bay

Royal Flying Doctor Service Victoria

Royal Flying Doctor Service - Surveying for success!

FUNDRAISING IMPACT THROUGH CREATIVITY

Joint Winners

Asylum Seeker Resource Centre (ASRC) *You can be the difference - ASRC Winter Appeal 2019*

MS Queensland *The Michael & Isabelle Campaign*

Highly Commended

Leukaemia Foundation of Australia *World's Greatest Shave*

Finalists

Barnardos Australia *Barnardos Tax Campaign 2019*

Special Mention

Geelong Grammar School *GGs Giving Day 2019 - Launching our Australian Rural and Regional Scholarship*

IMPACT ON A SHOESTRING

Winner

Asylum Seeker Resource Centre *Feast 4 Freedom*

Highly Commended

MS Queensland *MS Swimathon*

Finalist

Bears Of Hope Pregnancy & Infant Loss Support Inc *Beards of Hope 2018*

Stepping Stone House *Sleep Under the Stars (2018)*

BEST STRATEGIC PARTNERSHIP

Winner

Starlight Children's Foundation *The Power of Games: Starlight & EB Games*

Highly Commended

CBM Australia *Miracles Day*

Finalists

Social Money Solutions *Special Olympics Australia and NAB*

The Crusader Union of Australia (CRU) *CRU Lake Mac Redevelopment*

Mater Foundation *Plantation Homes - House for Life No Reserve Charity Auction*

Act for Kids *Auto @ General & Act for Kids - A Partnership now and for the future*

YWCA Australia *YWCA Australia and the Tim Fairfax Family Foundation Partnership*

Special Mention

Rafiki Mwema *A Heart of Gold - Constance Hall*

IMPACT THROUGH EVENTS

Winner

Multiple Sclerosis Limited *The All New MS Readathon – From the Final Page to Fantastic Future*

Highly Commended

MS Research Australia *The May 50K*

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

Finalist

Ronald McDonald House Charities WA *Up All Night*

Stepping Stone House *Sleep Under the Stars (2018)*

SUPPLIER TEAM OF THE YEAR

Winner

HomeMade Digital Australia *Nominated by: Peter MacCallum Cancer Foundation*

Finalist

Cornucopia Consultancy *Nominated by: Royal Flying Doctor Service Victoria*

HomeMade Digital Australia *Nominated by: MSWA*

MonDial Telephone Fundraising *Nominated by: Ethiopiaid Australia*

Donor Republic *Nominated by: Peter MacCallum Cancer Foundation*

ARTHUR VENN FUNDRAISER OF THE YEAR

National Winner

Martin Paul FFIA NSW

State Winner

Maurice Henderson FFIA FAHP CFRE SA

YOUNG FUNDRAISER OF THE YEAR

National Winner

Steffi Chang MFIA VIC

State Winners

Imogene Grant QLD

Tessa Irwin EMFIA CFRE NSW

Lauren McDermott MFIA WA



VOLUNTEER OF THE YEAR

National Winner

Sister Rita Malavisi, Asylum Seeker Resource Centre VIC

State Winners

Veronica 'Teddy' Bradley, Parkinson's NSW NSW

Val Marlow, Royal Flying Doctor Service (Queensland Section) QLD

Winter Appeal Committee, Anglicare WA WA

State - Highly Commended

Pete McNally, Far North Queensland Hospital Foundation QLD

Anne Stanton, QIMR Berghofer QLD

FUNDRAISING TEAM OF THE YEAR

National Winner

Royal Flying Doctor Service (Queensland Section) QLD

Royal Flying Doctor Service (Queensland Section): Fundraising & Philanthropy Team

State Winners

Mission Australia, Team on a Mission NSW

Harry Perkins Institute of Medical Research, WA

Harry Perkins Institute of Medical Research Marketing and Fundraising Team

Ethiopiaid Australia, Ethiopiaid Australia VIC

Cancer Council Tasmania, Cancer Council Tasmania Fundraising Team TAS

State - Highly Commended

MS Queensland, MS Queensland Fundraising & Marketing Team QLD



Include a Charity



INCLUDE A CHARITY Make your mark

Include a Charity has a vision to change charitable giving forever. The key is to inspire millions of Australians to include a deeply personal gift (one that aligns with their values) to a charitable cause in their Will. Gifts in Wills fundraising is so important because of the sheer number of financial resources it generates for the vital work of charities.

Beyond its current significance, the potential growth of Gifts in Wills giving is dramatic, enabling us to have an even greater impact on the world. We are a collaboration of over 90 charities in Australia, who cover a broad spectrum of causes in our community. Our annual social change movement provides knowledge, tools and confidence to help engage donors in a conversation about what they want to pass on to future generations.

In 2020, Include a Charity undertook a brand refresh which was launched on 1 July. The new brand identity featuring a green and blue heart with the tagline “Make Your Mark” is fresh, contemporary and encourages people to consider their legacy.

INCLUDE A CHARITY WEEK 2020 – KEY HIGHLIGHTS

- We had a total of 162 media placements with an approximate audience reach of 11,748,084
- We reached more than 771,424 unique users through our digital campaign, and more than 4,561 fundraising professionals, with 1,054 Will Guide downloads.
- Through our partnership with online Wills platform, Safewill, we brought? (don't think that's the right word?) brought? about 205 charitable gifts through Wills, with 106 different charities named.
- Through our online partnership with online Wills platform, Safewill, we brought about 250 charitable gifts in Wills, with 106 different charities named.

INCLUDE A CHARITY ADVISORY COMMITTEE 2020

We would like to thank our advisory committee members who provide valuable insight and expertise to assist the running of this campaign.

Roewen Wishart FFIA CFRE (Chair)
Marcus Blease FFIA, Donor Republic (FIA Board representative)
Kelly Burmeister MFIA, Mater Foundation
Jakki Travers MFIA, 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
Jasmine Hooper, Cancer Council NSW

FIA Foundation



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

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

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

2020 ACTIVITIES

New FIA Foundation Brand

A refreshed brand for the FIA Foundation was launched at FIA Conference 2020 in Brisbane in February 2020. Developed by Dalton Garland Blanchard, the new brand embodies a fresh, contemporary look. The FIA brand is built on trust, credibility and sector knowledge so the new identity for the FIA Foundation reflects this and signals FIA's ability to encourage, support and connect fundraising professionals. FIA gratefully acknowledges the pro-bono work done by Dalton Garland Blanchard.

FIA Foundation Committee

The FIA Foundation committee, and FIA Board Committee, began work on developing a business plan, including a marketing communications plan for the FIA Foundation. The plan will be ready for launch in March 2021. The FIA Board of Directors also acknowledge and thank the outgoing chair of the FIA Foundation committee, Elizabeth Davis, FFIA CFRE for overseeing the re-brand and the business planning and thank her for her contribution in 2020.

During 2020, initial research and work were completed on a new FIA course, Advanced Fundraising Leadership, by Professor Wendy Scaife FFIA, of the Australian Centre for Non-Profit & Philanthropy Studies at QUT with a tentative launch date of late 2021.

This work was funded by FIA Foundation donors and including a generous bequest to the FIA Foundation from Jim Weber FFIA and aims to honour Jim's legacy to help advance the profession and promote excellence in fundraising.

FIA Foundation Scholarship Recipient

Amy Luhrs, senior fundraising coordinator South West at LifeFlight was selected as the recipient of the FIA Foundation Scholarship for the FIA Certificate in Fundraising in June. There were eight applicants for the FIA Foundation scholarship in 2020.

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.

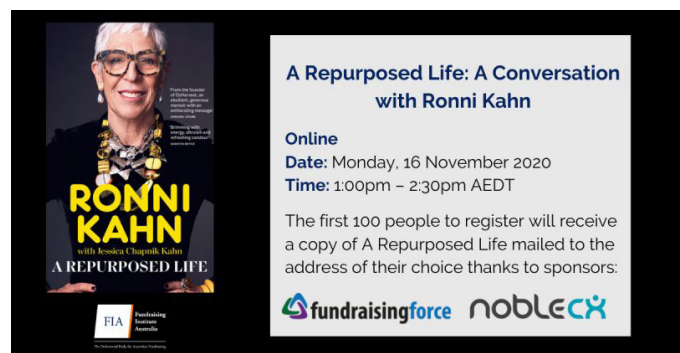
ACT

Ann Ronning MFIA Chair
 Alicia Edwards MFIA
 Helen Falla MFIA
 Morgan Ferrier MFIA
 Jason Haines MFIA
 Jaclyn Callaghan MFIA
 Hilde Schneider MFIA
 Diane Kargas Bray FFIA AM (resigned 2/07/2020)



NSW

Tessa Irwin EMFIA CFRE Chair
 Stephen Mally FFIA CFRE
 Cara Morrison MFIA CFRE
 Anthea Cohen MFIA
 Maisa Lopes Gomes De Paiva EMFIA
 Julie Johnson EMFIA
 Elizabeth Phegan MFIA
 Karl Tischler MFIA
 Karen Gair MFIA CFRE
 Wendy Farrow (resigned 31/5/2020)
 Leanne Dib MFIA
 Christine Roberts FFIA



QLD

Christine Anderson MFIA CFRE Chair
 Vicki James FFIA
 Benjamin Cox FFIA
 Katherine Ash MFIA (resigned 21/05/2020)
 Lorelle Silveira MFIA (resigned 19/08/2020)
 Victoria Andrews MFIA
 Abby Clemence (resigned 8/04/2020)
 Cherie Smith MFIA
 Claire Hughes MFIA CFRE
 Daniel Lalor MFIA
 Angela Motta MFIA
 Meredith Dwyer FFIA CFRE



SA/NT

Rebecca Miller EMFIA Chair
Elizabeth Davis FFIA CFRE
Cassie Magin EMFIA
Maurice Henderson FFIA FAHP CFRE
Raquel Dillon MFIA
Alix Katala MFIA
Anthea Rice MFIA

TAS

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

VIC

Karen McComiskey MFIA CFRE Chair
Alan White MFIA CFRE
Kalimar Donvin-Irons (resigned 14/5/2020)
Steffi Chang MFIA
Cory Hall MFIA
Stephen Ellis (resigned 2/7/2020)
Shuie Gestetner
Antonia Makkar MFIA
Joel Nicholls CFRE (resigned 22/10/2020)
Jean-Pierre Amour MFIA
Francesca Barnett AMFIA
Libby McMeekin MFIA

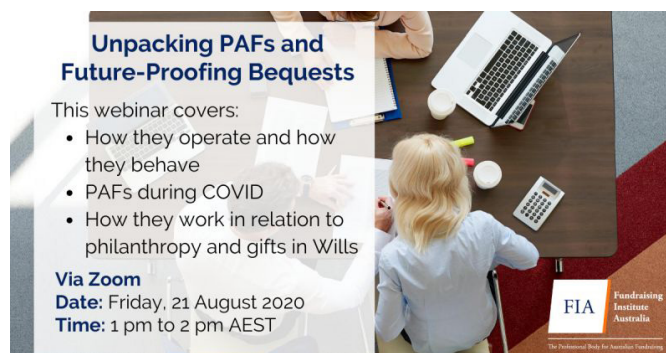
WA

Bec Stott FFIA Chair
Vicki Rasmussen FFIA CFRE
Tanya Hundloe FFIA CFRE
Lisa Miller MFIA
Tori Anderson MFIA
Ferdie Fourie MFIA
Paul Ineson MFIA
Ellaine Hislop EMFIA CFRE
Andrea Alexander EMFIA
Rikki Stewart MFIA (resigned 15/10/2020)
Lauren McDermott MFIA
Freya Barr (resigned 18/06/2020)

Australian Federal Government Coronavirus Support Package

Senator The Honourable Anne Ruston will discuss the allocation of these \$100 million funding injection to more than 300 charities and not-for-profit organisations in Australia as part of the Government's Coronavirus support package.

Via Zoom
Thursday 28 May 2020
1.00pm - 2.00pm AEST.



Unpacking PAFs and Future-Proofing Bequests

This webinar covers:

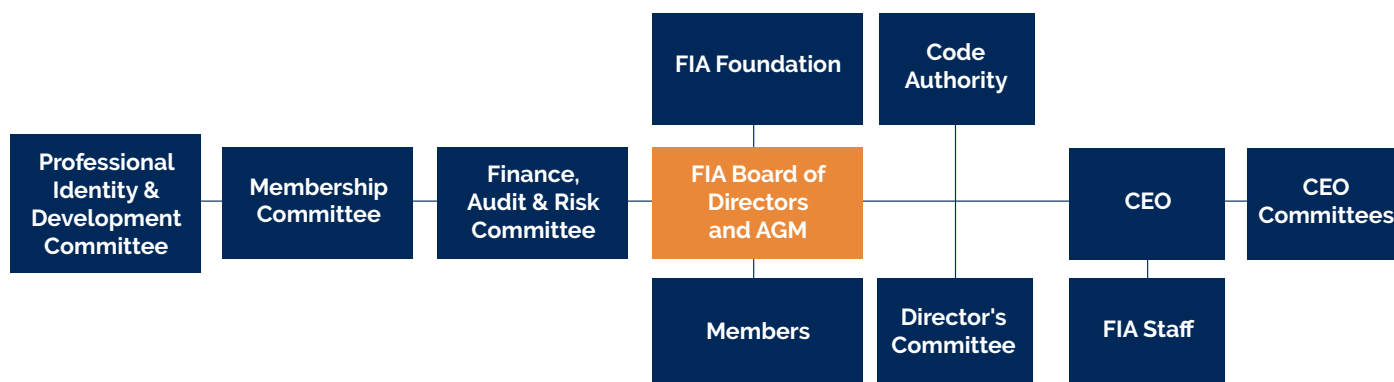
- How they operate and how they behave
- PAFs during COVID
- How they work in relation to philanthropy and gifts in Wills

Via Zoom
Date: Friday, 21 August 2020
Time: 1 pm to 2 pm AEST

FIA Fundraising Institute Australia
The Professional Body for Australian Fundraising

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 2020

The FIA 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 2020.



CHAIR

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.



BOARD MEMBER

James Garland FFIA CFRE

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 FFIA

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 (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 (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.



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 (QUEENSLAND)

Ben Cox FFIA

CEO, Gold Coast Hospital Foundation

Appointed Director February 2020, 2012-2017;

Professional Development and Identity Committee 2020;

FIA QLD 2019-2020, 2014-2017, 2012-2013, QLD Chair 2014-2015

Awards Judge 2014-2015; Code Authority 2017-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 Blease FFIA

Co-Founder/Director, Donor Republic

Appointed Director February 2015; SA Presenter 2015-2016; WA Presenter

2009, 2017; Sector Sustainability Taskforce 2016; Conference Chair 2018;

Conference Speaker 2009, 2011 – 2017; Awards Judge 2014.

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.

FINANCE, AUDIT AND RISK COMMITTEE

Chair: Trudi Mitchell FFIA
Meredith Dwyer FFIA CFRE
Paul Flynn FFIA
Jim Hungerford MFIA
Joe Shannon C.A.

MEMBERSHIP

Chair: Stephen Mally FFIA CFRE
Allan Godfrey FFIA
Lisa Miller MFIA
Rebecca Passlow
Alan White MFIA CFRE

PROFESSIONAL DEVELOPMENT AND IDENTITY

Chair: Daniel Lalor MFIA
Nigel Harris FFIA CFRE
Michelle Folder MFIA
Benjamin Cox FFIA
Marcus Blease FFIA

NOMINATIONS COMMITTEE

Chair: James Garland FFIA CFRE
Paul Flynn FFIA
Judith Ford FFIA CFRE
Nigel Harris FFIA CFRE
Vicki Rasmussen FFIA CFRE

FELLOWS NOMINATIONS COMMITTEE

Chair: Vicki Rasmussen FFIA CFRE
Leanne Angel FFIA CFRE
Sharon Hillman FFIA
Tracy McNamara FFIA
Roewen Wishart FFIA CFRE

FIA FOUNDATION

Chair: Elizabeth Davis FFIA CFRE
Christine Anderson MFIA CFRE
Peter Dalton FFIA CFRE
James Garland FFIA CFRE
Tanya Hundloe FFIA CFRE
Zoe Karkas FFIA
Leo Orland FFIA CFRE
Vicki Rasmussen 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 FIA Board of Directors and staff would like to take this opportunity to thank all our sponsors and volunteers for their contribution to fundraising and the work of FIA.

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



Financial Report

for the Year Ended 31 December 2020

STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME for the Year Ended 31 December 2020

	Note	2020 \$	2019 \$
Revenue	2	3,607,814	3,408,094
Administration expenses		(58,669)	(59,577)
Conference, workshop and campaign expenses		(1,410,172)	(1,723,186)
Occupancy expenses		(169,133)	(162,583)
Employee benefits expense		(1,686,330)	(1,583,978)
Depreciation and amortisation	3	(56,718)	(57,007)
		<hr/>	<hr/>
		(3,381,022)	(3,586,331)
		<hr/>	<hr/>
Net Surplus/(Deficit)		226,792	(178,237)

STATEMENT OF FINANCIAL POSITION

as at 31 December 2020

	Note	2020 \$	2019 \$
ASSETS			
Current Assets			
Cash and cash equivalents	6	1,984,876	2,214,719
Receivables	7	211,727	285,987
Other assets	8	3,800	4,423
Total current assets		2,200,403	2,505,129
Non-current assets			
Software, plant and equipment	9	12,767	11,586
Rebrand and Development costs	17	-	44,780
Right to use assets	18	303,948	418,448
Total non-current assets		316,715	474,814
TOTAL ASSETS		2,517,118	2,979,943
LIABILITIES			
Current liabilities			
Payables	10	146,476	262,226
Provisions	12	55,881	58,259
Deferred income	11	1,001,574	1,465,952
Funds held on trust		49,505	46,849
Lease liabilities	18	123,330	123,330
Total current liabilities		1,376,766	1,956,616
Non-current liabilities			
Provisions	12	34,806	30,073
Lease liabilities	18	180,618	295,118
Total non-current liabilities		215,424	325,191
TOTAL LIABILITIES		1,592,190	2,281,807
NET ASSETS		924,928	698,136
EQUITY			
Accumulated funds		924,928	698,136
TOTAL EQUITY		924,928	698,136

STATEMENT OF CHANGES IN EQUITY

for the Year Ended 31 December 2020

2020	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2020	698,136	698,136
Surplus/(Deficit) for the year	226,792	226,792
Balance at 31 December 2020	924,928	924,928

	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 2020

	Note	2020	2019
		\$	\$
Cash from operating activities:			
Receipts from members and customers		3,919,756	3,739,652
Payments to suppliers and employees		(3,988,579)	(3,362,458)
Interest received		1,393	8,319
Lease payments		(149,291)	(136,226)
Net cash (used by)/provided by operating activities	14	(216,721)	249,287
Cash flow from investing activities:			
Payment for non-current assets		(13,122)	-
Payment for rebranding		-	-
Net cash (used in)/provided by investing activities		(13,122)	-
Net (decrease)/increase in cash and cash equivalents held		(229,843)	249,287
Cash and cash equivalents at beginning of financial year		2,214,719	1,965,432
Cash and cash equivalents at end of financial year	6	1,984,876	2,214,719

Level 6, 350 Kent Street
Sydney NSW 2000

75 Lyons Road
Drummoyne NSW 2047

K.S. Black & Co.

Chartered Accountants

ABN 48 117 620 556

20 Grose Street
North Parramatta NSW 2151

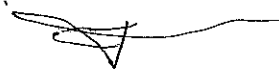
PO Box 2210
North Parramatta NSW 1750

AUDITORS INDEPENDENCE DECLARATION TO THE DIRECTORS OF FUNDRAISING INSTITUTE AUSTRALIA

I declare that, to the best of my knowledge and belief, during the year ended 31 December 2020 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 *20th day of January 2021*



Liability limited by a
scheme approved
under Professional
Standards Legislation

Phone 02 8839 3000 17ax 02 8839 3055

www.ksblack.com.au



CHARTERED ACCOUNTANTS
AUSTRALIA • NEW ZEALAND

To the Members of Fundraising Institute of Australia

Opinion

We have audited the accompanying financial report of Fundraising Institute Australia, which comprises the statements of financial position as at 31 December 2020, the statements of profit or loss and other comprehensive income, the statements of changes in equity and the statements of cash flow for the year 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 2020 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 year 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 2020, 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 and 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/Hom.aspx>. This description forms part of our auditors report.

KS Black & Co
Chartered Accountants



Scott Bennison
Partner

Dated in Sydney on this *28th day of January 2021*

The logo for the Fundraising Institute Australia (FIA) features the letters 'FIA' in a white, serif font, centered within a dark blue square. A thin orange vertical line is positioned to the right of the square.

FIA

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



Prepared by Fundraising Institute Australia

31 December 2020

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