



**FIA**

**Fundraising  
Institute  
Australia**

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The Professional Body for Australian Fundraising

# **Annual Report 2022**

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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 beginnings in 1968 and establishment in 1972, 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 2022, Australians were still generous, with giving rates going up after the COVID-19 slump.**

In fact, Australia remains one of the most generous countries in the world with 55% of Australians supporting people and causes through giving money, aid or time, according to the Charities Aid Foundation's (CAF) World Giving Index 2022. Australia ranked fourth out of 119 countries in the index, moving up from fifth place last year.

According to CAF, 69% of Australians helped strangers, 64% donate money and 33% volunteered their time. The relaxation of lockdown rules and return of in-person events helped Australians to return to civil society and encouraged more to help strangers and donate money. The rationale for Australia's continuing generosity? "Australia's mateship culture and desire to create a fair society may well underpin Australians' ongoing desire to give."<sup>1</sup>

Melbourne Institute's Taking the Pulse of the Nation report found 72% of Australians had donated in 2022, nearly a 12 percentage point increase year-over-year. While this level of giving is lower than the 81% reported in the 2016 Giving Australia report and is not back to pre-pandemic levels, it is still uplifting. Overall, there has been an increase in the share of respondents who reported giving more than \$100 over the past 12 months, with the biggest increases for those reporting annual donations of between \$100 and \$500.<sup>2</sup>

Meanwhile, the second annual JBWere/NAB Charitable Giving Index, which is derived from NAB transaction data, suggested that giving is now rebounding after decreases in 2019–20 and 2020–21. It predicted that charitable giving could bounce back to pre-pandemic levels in 2022. Not surprisingly, health charities were the most popular beneficiaries during the worst of COVID, while animal welfare organisations also held up well, post the extraordinary support they received during the 2019–20 bushfires. There were also good recoveries in giving for arts and culture, environment and religion, but other causes had only modest gains.<sup>3</sup>

The above news is heartening, given that another report covering the 2019–20 financial year found that individual Australians had not increased their charitable giving. The Australian Tax Office statistics on tax-deductible giving, compiled into an annual analysis by the Australian Centre for Philanthropy and Nonprofit Studies, revealed the total amount donated and claimed by individuals as tax-deductible donations was \$3.85 billion, down from \$3.93 billion in 2018–19. This change represented a decrease of \$83 million (or 2.11%) from the previous income year.

Additionally, the average tax-deductible donation made to DGRs and claimed by individual Australian taxpayers in 2019–20 was \$886.75, a decrease of 4.98% from \$933.20 in the previous income year. But the median tax-deductible donation had increased slightly from \$120 to \$130. Once again, the largest proportion of donations came from New South Wales, followed by Victoria and Western Australia. These three states together accounted for 78.31% of all donations claimed.<sup>4</sup>

There are now over 60,000 registered charities in Australia, according to the Australian Charity and Not-for-profits Commission (ACNC). The organisation celebrated its 10th anniversary as the national charity regulator in 2022, highlighting its work to maintain public confidence in charities, cut red tape and support an innovative sector.<sup>5</sup>

1 Charities Aid Foundation, CAF World Giving Index 2022

2 Melbourne Institute, Taking the Pulse of the Nation 2022

3 JBWere and NAB, JBWere/NAB Charitable Giving Index January 2022

4 Australian Centre for Philanthropy and Nonprofit Studies, QUT, An examination of tax-deductible donations made by Australian taxpayers in 2019-20

5 Australian Charities and Not-for-profits Commission, 'A significant milestone: The ACNC's 10th anniversary'

The ACNC's Australian Charities Report 8th Edition, analysed the most recent available data (from 2020) about the size, diversity and activities of Australia's charity sector. Religion was the top charitable activity, followed by education and human services work. The sector employed 1.38 million people – 10.5% of the workforce – and 3.4 million volunteers.

Donations rose by 8% to \$12.7 billion as Australians generously gave to help those impacted by the bushfires of 2019–20. The sector is now worth \$176 billion – up by more than \$10 billion on the previous year. But expenses also increased by \$10.2 billion, no doubt the result of charities pivoting to digital fundraising and coping with changing needs during the pandemic.

Pleasingly, the ACNC found: “there may be some bruises and scars to show for it, but there is no doubt that charities are built on a strong foundation of resilience, innovation and importantly, public support, trust and confidence.”<sup>6</sup>

A key issue remained in 2022: the shortage of fundraising talent. The 2022 NGO Recruitment Hiring Insights and Salary Snapshot of 100 Australian not-for-profit organisations report revealed that 77% of respondents were having a hard time recruiting (border closures during the pandemic had not helped) and 41% said it was tough to retain talent.

Almost half of respondents (43%) said fundraising, marketing and communications/events teams were their top priority, up from a quarter of respondents last year. During the pandemic, there was a rise in the need for online fundraising skills, but the report found there was now a demand for a more diverse approach to fundraising.

As the sector emerged from the worst of the pandemic in 2022, a new issue was already brewing: a cost-of-living crisis brought about by rising inflation and interest rates. Indeed, as the end of 2022 approached, there were media reports about charities facing increased demand for their services due to this challenge.<sup>7</sup> Charities were already expressing concerns that donations would be hard to come by with more Australians feeling the pinch. The year ahead is again an uncertain one for the sector.

FIA's role as a leader in the charitable fundraising sector and its mission to advance professional fundraising means it will continue to provide tools, resources and best-practice guidance for fundraisers, management teams, not-for-profit CEOs and their boards to navigate the continuing uncharted waters of the future.

<sup>6</sup> Australian Charities and Not-for-profits Commission, Australian Charities Report 8th Edition, foreword

<sup>7</sup> Daily Telegraph, 'Appeal for Xmas Cheer,' 6 December 2022

# Chair's Report

**I am pleased to present FIA's 2022 Annual Report to members and the broader community.**

**It has yet again been a challenging and somewhat chaotic year for fundraisers off the back of more than two years of pandemic-related disruption, continued natural disasters in many parts of the country and increasing economic uncertainty.**



While fundraisers have succeeded through extremely challenging times before, it is clear that organisations and fundraisers who have sought innovation and embraced change as well as remained focused on ethical, best-practice fundraising have thrived.

As the peak body for the \$12.7B charitable fundraising sector, FIA has also been affected by continued disruptions on our usual operations including the timing of our annual conference which we delayed from our typical late February date to early June. Though a challenging decision to make, it was the right one as we saw record attendance in Sydney with close to 900 attendees, beating the previous 2020 attendance record.

In 2021 we launched our high-touch approach to the community and the membership structure, allowing entire fundraising teams of organisational members to access key benefits. This has resulted in increased member engagement and growth, with numbers now over 7,100. Organisational member growth has been dramatic, rising from 285 organisation members in 2015 to 644 in 2022. At the same time, our member net promoter score remains steady and our members and the broader community continue to view the peak professional body as critically important.

In 2022, we continued to enhance our work in professional development and identity for fundraisers. We built on our strategy to advance our professional education offer with investment in a new learning management platform, set to launch in early 2023, which will allow for new and innovative modes of professional development for everyone involved in fundraising.

A new Assistant Minister for Charities was appointed in May, bringing renewed optimism in reform for fundraising regulations. We continued our engagement with both Federal and state governments to influence and bring about change in the regulatory environment. FIA wrote five submissions during the year on behalf of members on issues critical to the fundraising and broader charitable sector, some in collaboration with other peak organisations. We had a significant win in achieving better results for charities who use Mastercard payment facilities as a result of intense lobbying and leadership.

The self-regulatory FIA Code continues to be the cornerstone of FIA's work and has now been operational in its current format for five years. In 2022, the team worked with Federal Treasury to revise the guidance on fundraising and natural disasters and introduced new guidance in the areas of digital fundraising and fundraising and younger people. The Code Authority's compliance program continued to provide members with critical information on how they can achieve ethical best-practice and serves as a driver for the FIA education program to continue to meet the needs of fundraisers. Uptake of the FIA Code, demonstrated by the registrations of the FIA Code course, continue at pace and ticked over 6,700 total registrations by the fourth quarter of 2022.

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 awards remained free to enter, expanding their accessibility, thanks to the generous sponsorship of Mondial and Precision Fundraising. A huge thanks to our 30+ judges who gave up their time to review submissions and debate their merits!

Our state committees managed to hold a variety of both in-person and online events again this year including delivering record-breaking attendance at one-day events in South Australia, Western Australia and Tasmania. Like most non-profit organisations, FIA rely heavily on volunteers and we are grateful to the more than 200 people who give their time to the organisation and to the sector. They ensure a sustainable future for FIA and help us to achieve our aims.

The FIA Board also comprises hardworking volunteers who provide their time and expertise to FIA and to whom we owe a huge thanks. They also contribute additionally on committees which provide strategic oversight for FIA operations. In 2022, the FIA Board made significant advancements in its governance remit including in reviewing, renewing and adding critical policies as well as in managing and mitigating risk.

In 2022, the Board Nominations Committee took up the revised terms of reference developed in 2021 to widen our recruitment for future Director roles, meeting the needs of our Board Skills Matrix, and our commitment to diversity on our board. This year nominations for vacancies on the Board were put out in a call to the membership, resulting in 13 nominations, all of whom were of high calibre and are a testament to the increased level of passion for and engagement with the peak body for professional fundraising.

Financially, FIA is in its strongest position in many years, having turned around a budget deficit agreed to by Board, to a small net positive result and with a healthy balance sheet which puts the organisation in a very good position for future investments in innovation and growth.

I thank the FIA staff who, even in particularly challenging times, continue to deliver excellent service to members. We are grateful to you for your hard work and commitment to advancing professional fundraising in Australia.

**Meredith Dwyer FFIA CFRE**

**CHAIR**

**Fundraising Institute Australia**

# Chief Executive's Report

## I'm pleased to present the FIA 2022 Annual Report.

The year started with the usual excitement for our annual national conference but it was clear very early in January with a new wave of COVID, that delivery of our flagship event would be impacted. We made the difficult but necessary decision to delay it to June and the delivery adjusted to meet the changed conditions. We were delighted to report record attendance despite the changes, with close to 900 attendees gathering at International Convention Centre Sydney in June. It was an incredible event with a 'vibe' that was unparalleled and corresponding high satisfaction scores.



Prior to COVID, we had planned in earnest for one of the most significant changes to the FIA membership structure in years which we launched with great success in June. Under the new structure, the entire fundraising team of FIA organisational members can now access most FIA benefits, bringing even greater value to FIA members. At the same time, professional members who work for an organisational member saw their annual membership fee reduced significantly to ensure those fundraisers who are keen to advance their profession are able to afford membership with the national peak body. This allows FIA to increase its reach and influence and has resulted in more than doubling of organisational members since 2015, and a tripling of total members from 2,326 in 2021 to 7,100 in 2022.

In May we held our fourth annual FIA Essential Member Update to provide members with key updates on the sector and the work of FIA. As in 2021, we held the event via Zoom for the entire country.

In regulatory affairs, we are on track to achieve the self-regulatory goals outlined in our strategic plan including increased uptake of the Code – indeed, training is still strong with more than 6,700 registrations/completions to date.

On the advocacy front, we wrote six submissions to Federal and state governments and lobbied on behalf of members and the sector around key issues including changes to Mastercard guidelines on subscription (regular giving) payments.

Our professional development program continued to go from strength to strength. We continued to offer a vast arrange of courses online with strong attendance figures given the increased accessibility for fundraisers all over the country. We delivered 45 courses with 314 hours of education and training along with a national mentoring program with 182 participants.

Late in 2022 we implemented a new Learning Management System (LMS) in order to continue to advance our capabilities in professional education and look forward to launching the new platform with refreshed courses and other learning and engagement opportunities early in 2023.

The national mentoring program remains very popular, attracting 91 pairs (mentors and mentees).

Our work in the area of diversity, equity and inclusion (DEI) continued in 2022 with a small and dedicated group working on incremental steps we can take within FIA and amongst our members beginning with key advancements at FIA Conference to make the event more diverse and inclusive.

We count ourselves incredibly lucky to have over 200 volunteers working on our behalf across the country, including within our seven state and territory committees.

Include a Charity, our social change movement, hosted a successful Include a Charity Week in September with a campaign audience reach of over 10.5 million. I thank our advisory committee



who lead the work to encourage more Australians to consider gifts in Wills.

Financially, FIA remains in a very strong and stable position. Given the uncertain environment when developing the 2022 budget late in 2021, we put forward a deficit budget of over \$200K however, pleasingly we turned it around, due to the success of our national conference, our Jobs service and marketing opportunities as well as increases in membership, to a small surplus of \$53K.

I am grateful to FIA Board Chair Meredith Dwyer FFIA CFRE and the FIA Board of Directors for their invaluable guidance in helping to create a relevant, responsive and dynamic membership organisation. And to our national sponsors Database Consultants Australia (DCA), Precision Fundraising and Marlin Communications, as well as the many other – more than 100 – organisations who support our work. I also thank the hundreds of FIA volunteers – State Committee Chairs and members, Conference and Awards Committees, Board and other important committees, who give so much of their time to FIA and to their fellow fundraisers.

I continue to be amazed by the deep engagement of our members, partners and suppliers, not to mention the generosity of Australians in supporting our members' work and their incredible, professional efforts in unprecedented times.

Finally, my thanks to the FIA team. In yet another very challenging year, their continued and energetic support and passion for their work in service to members and the fundraising community is very much appreciated.

**Katherine Raskob MIM GAICD**

**CHIEF EXECUTIVE OFFICER**

**Fundraising Institute Australia**

# Honorary Treasurer's Report

**It is my pleasure as your Treasurer to present the Financial Report for the year ended 31 December 2022 as audited by K S Black & Co.**



## SUMMARY OF THE FINANCIAL RESULTS

During the first quarter of 2022 the impact of the pandemic was still being felt across the country and FIA took the difficult decision to postpone our flagship event, the 2022 National Conference. Early 2022 saw circumstances that continued to challenge our business and, given the ongoing disruptions and difficulties in travel and meeting face to face in all states, FIA postponed the Conference until June.

This was immensely challenging to our small team as June is also the peak of membership renewal season and all hands stepped up to the challenge of meeting the needs of these two key areas of our business in the same quarter. Notwithstanding the immense challenges, the team successfully delivered a conference that was extremely well attended and regarded by many as the best conference yet, providing not only high value professional development to hundreds of fundraising professionals but also a chance for colleagues that had not had the opportunity to meet personally for a few years to catch up again. We had scaled back our expectations for revenue for Conference given the changed timing of delivery and a host of unknowns and were thrilled to achieve our highest attendances yet and with income significantly in excess of budget.

While the state and education programs maintained a significant component of their delivery in an online format during the first half of the year, the face-to-face programs picked up in the second half maintaining revenue expectations. Income from advertising has exceeded budget expectations.

These factors combined with a continuing tight control on expenditure enabled FIA to achieve a surplus of \$53k for the year. We thank our committees, tutors, speakers and suppliers for assisting us to provide exceptional services to ensure FIA continued to deliver quality professional education.

## OPERATING ENVIRONMENT

The budget set for the year was to incur an operating loss in order to maintain high service levels and investments in technology. The continued support and uptake of our services resulted in providing sufficient income for the board to agree to invest in a new learning management system while still providing a surplus for the year.

The FIA staff are to be commended for managing our ongoing programs combined with implementing a significant upgrade to the salesforce database, a new attendee registration system, embedding the new job advertising program and commencing the implementation of a learning management system; we are hugely grateful to our tutors, presenters, committee members and speakers who continue to go above and beyond to provide professional education and assistance to our members with resulting increases in attendances; in 2022 the numbers reached over 8,100 across the year.

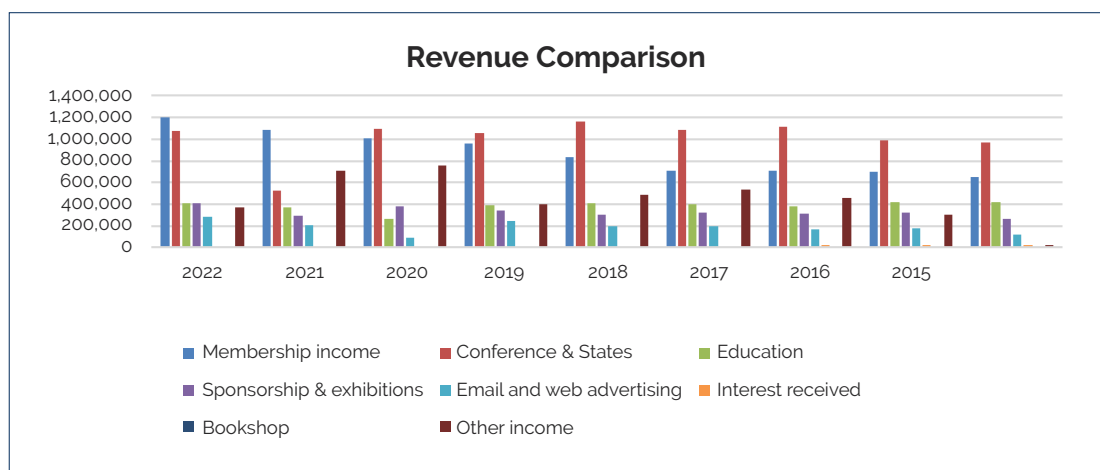
The fundraising sector continues to see the value of the Code as a baseline expectation for fundraising excellence for the sector with over 6,700 registrants; charities and suppliers to the sector are increasingly now booking groups of staff to take the course as an annual update within their professional development plans and embedding the course within internal induction frameworks for onboarding staff.

A key plank of the FIA strategic plan has been to diversify the reliance on income streams and grow income from membership. To enable this, FIA restructured the membership categories in the previous year which has been extremely successful; membership numbers total 7,180 at year end with 1,033 voting members. Overall retention rates grew from 82% to 93%. This is a significant achievement and is testament to the high-touch strategy in both member engagement and Code compliance work.

## INCOME

Income for the year was \$3.7M, an increase of \$557k on 2021 results; a strong result which highlights the significant growth in all programs. 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.

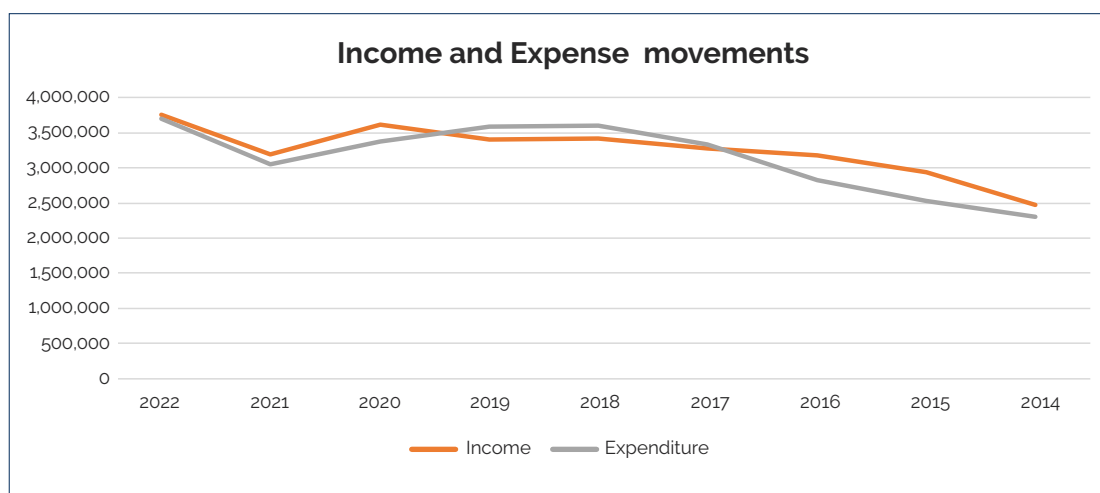
The chart below shows the income contribution from each revenue stream highlighting the weight of each key area of the business.



## EXPENSES

Total expenses for the year were \$3.7M, representing the investments made in the learning management system, upgrade to salesforce and the additional costs incurred in holding a much larger face to face conference compared to an online offering and with a continued focus applied to reducing costs across all functions where possible.

The chart below shows the movement of total income and expenses from 2014 to 2022.



## OUR FINANCIAL POSITION

The surplus of \$53k achieved this year will build reserves to \$1.13M which provides FIA with a buffer to withstand tightening financial circumstances ahead and ensure our ability to continue to invest in upgrading our online platforms. While the 2022 budget was cast in the expectation of making a loss, the turnaround achieved by the success of our programs has enabled a net cash inflow of \$951k for the year increasing our cash position to \$3.5M at year end. This is sufficient to meet commitments and future needs.

## FINANCE AND AUDIT COMMITTEE

The significant workload of a combined Finance, Audit and Risk committee led Directors to resolve to create a new committee specifically to manage Risk. As a result, the Terms of Reference of this current committee are now to provide management of the Finance and Audit functions of the organisation, receiving advice and input from the Risk Committee.

The members of the Risk committee are:

- Benjamin Cox FFIA
- Meredith Dwyer FFIA CFRE
- Alan White MFIA CFRE
- Christine Anderson FFIA CFRE

This will be my last year as chair of the Finance and Audit committee as I take on the role of FIA Chair post AGM. I would like to thank my fellow committee colleagues for their support, guidance and dedication to FIA:

- Meredith Dwyer FFIA CFRE
- Jim Hungerford MFIA
- Joe Shannon B. Comm CA
- Lisa Allan FFIA
- Alexandra Struthers

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 2022.

**Benjamin Cox FFIA**  
**HONORARY TREASURER**

# 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 in 2018 for FIA members. Monitoring of compliance is conducted through complaints handling and mystery shopping. An independent Code Authority oversees all aspects of Code administration.

## ABOUT THE CODE AUTHORITY

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

The Authority is independently chaired by former NSW Liberal leader Peter Debnam; members in 2022 are Benjamin Cox, CEO, Gold Coast Hospital Foundation; Christopher Zinn, Donor/Consumer Representative; Ashley Rose, CEO of Mondial Fundraising Communications, Karen Shields, Director-Individual Giving, Great Barrier Reef Foundation, Nerida Wallace, Principal of Transformation Management Services and Shanthini Naidoo, CEO at St Vincent's Curran Foundation. Members of the Code Authority are appointed by the FIA Board of Directors for their stature in the fundraising community as well as their ability to adjudicate independently in the interest of upholding the values embodied in the Code.

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

The Code Authority members have worked together in a highly collegiate and reflective manner, to enable FIA to understand the issues within fundraising that need to be addressed. The Code Authority has taken to heart the public's concern about certain aspects of fundraising practice, and collaborated with FIA to develop training, education and resources to assist members and advance its cause for self-regulation to government.

## COMPLAINTS HANDLING

As part of its role in administering the Code, the Code Authority reviews complaints to FIA on fundraising issues related to its members. A complaints form is available at [fia.org.au](http://fia.org.au) for members of the public to lodge a complaint about a fundraising organisation. The FIA Code Authority adjudicates on the complaint and provides advice and guidance on handling, ideally to the

satisfaction of the complainant. Complaints provide valuable information to the Code Authority and to FIA with regard to areas or issues for improvement. A total of 12 complaints against FIA members were recorded and resolved in 2022. This compares to 10 in the previous year. There were also three complaints recorded against non-FIA members in 2022, all of which were resolved.

## CODE COMPLIANCE MONITORING

As part of its role in administering the Code, the Code Authority commissions third-party monitoring of member compliance. Techniques include mystery shopping in which monitors pose as donors. Monitoring focusses on areas of the Code that the Authority believes are most relevant to ensuring the fundraising profession maintains a high standard and a good public reputation. Monitoring during 2022 covered members responses to donors in vulnerable circumstances, management of donor opt outs, donor data privacy, members' compliance in fundraising in response to national disasters, members' sharing of donor data and digital and social media fundraising. Donations and contacts were made with members through mail, online, digital platforms, and by telephone. All subsequent communications with the donor were monitored. The details of all communications were recorded and assessed for compliance with the FIA Code and Practice Notes. The aim of monitoring is to support members' compliance with the Code. Any breaches noted in the course of monitoring are reported to members with the aim of assisting the member to review and improve their processes to reduce the risk of future non-compliance. FIA also assesses trends and broader concerns identified in monitoring to inform the development of member resources and training in support of Code compliance. Monitoring results have also informed FIA's government engagement and continue to support positive regulatory outcomes for members. Monitoring continues to show that the overwhelming majority of FIA members' fundraising is compliant with the FIA Code.

### MONITORING ACTIVITY

There are two streams of monitoring:

- Ongoing monitoring that tracks a wide range of fundraising communications to assess members' Code compliance across a broad spectrum of channels.
- Monitoring designed to assess compliance with a specific part of the Code or of a specific channel or practice of interest or concern identified by the Code Authority.

In 2022 the Code Monitor continued nine ongoing monitoring activities and initiated an additional nine activities.

## MYSTERY SHOPPING

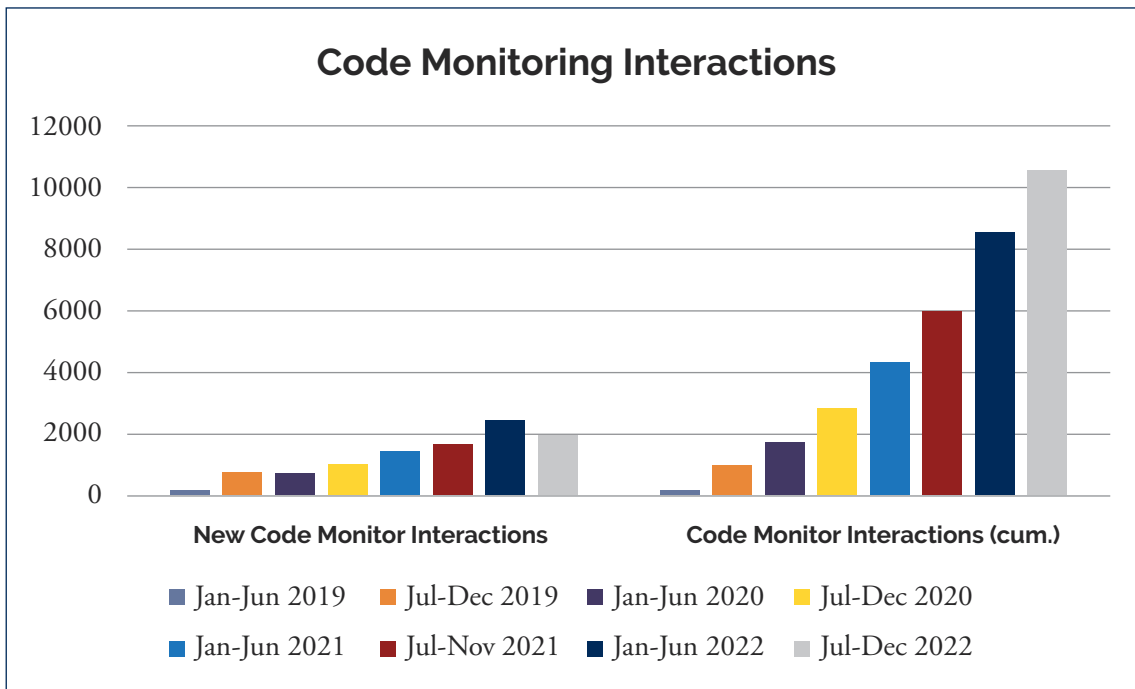
### MONITORING 2022

<b>392</b> members included in mystery shop	<b>4,494</b> fundraising interactions	<b>18</b> issues noted for review
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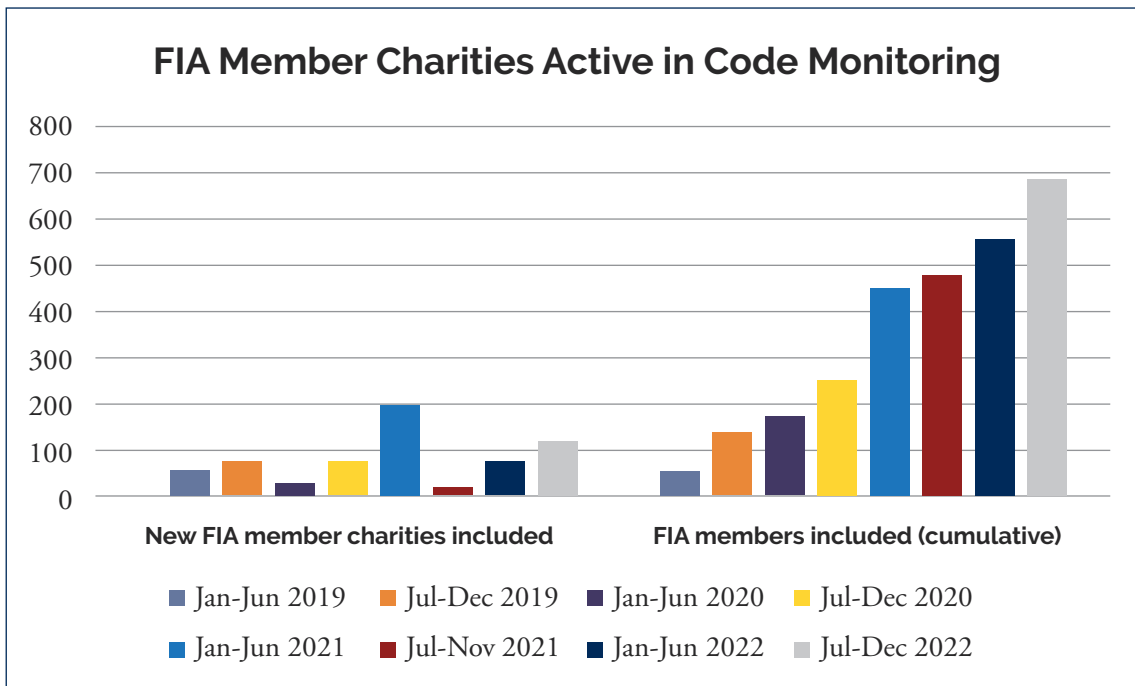
### MONITORING 2019 TO 2022

<b>688</b> members included in mystery shop	<b>10,575</b> fundraising interactions	<b>89</b> issues noted for review
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# MEMBERS AND INTERACTIONS

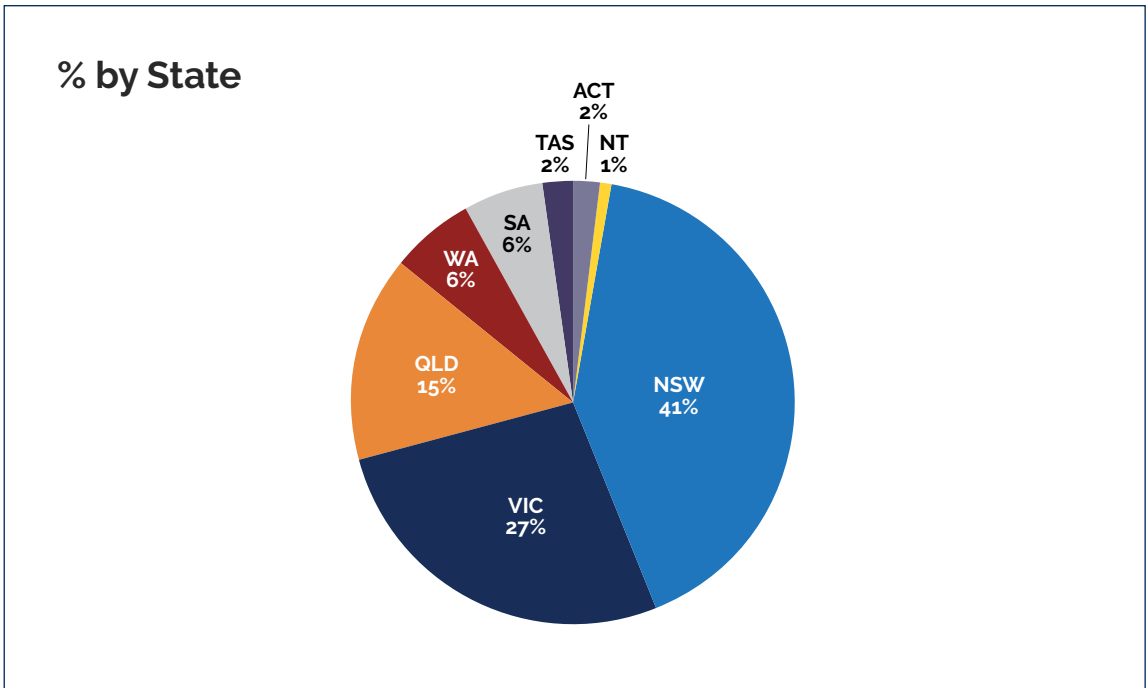
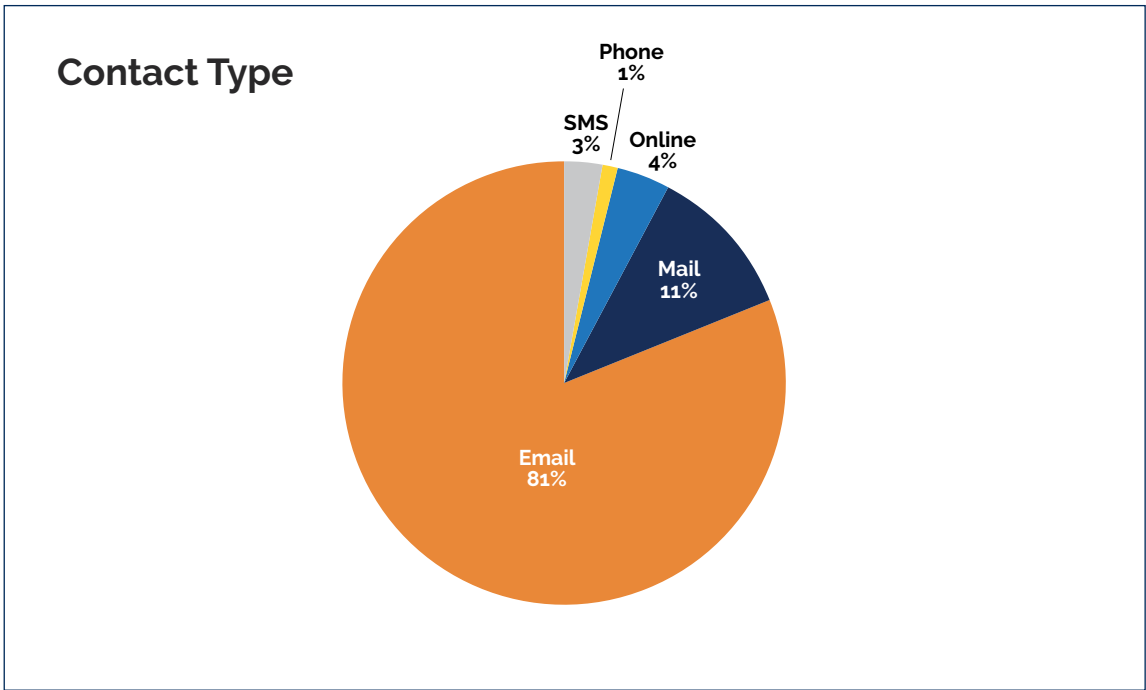


Code monitoring continues yearly since 2019 with 500 to over 2,000 interactions each year. The total interactions to December 2022 number over 10,000.



Each year new members are added to mystery shopping activities, randomly chosen. By December 2022, almost 700 organisational members have been involved in mystery shopping.

# INTERACTIONS BY TYPE AND STATE





# CODE COMPLIANCE TRAINING REPORT

By end of 2022, just under 6,800 people had registered for the FIA Code Training.

## CODE AUTHORITY MEETINGS IN 2022

The Code Authority met four times in 2022. Each meeting included a report from the Code Monitor and updates from the FIA CEO, and Policy Advisor. Other regular agenda items included updates on the FIA Code training, complaints reporting, communications and FIA Code awareness initiatives. Meetings were routinely followed by a ‘Code Update’ to FIA members containing a summary of compliance outcomes and other matters. The Code Authority also handled a variety of complaints from the public against members and non-members (see details next page). In response to the monitoring reports, the Code Authority provided guidance to the FIA CEO in approaching members on their mystery shopping findings. As part of its oversight of the FIA Code, the Code Authority also presided over the introduction of two new Practice Notes and redeveloped guidance on percentage-based remuneration for FIA Members.

## CODE AUTHORITY MEMBERS, APPOINTMENTS AND TERMS

Members of the Code Authority are appointed for a two-year term, with a maximum of two terms or four years. At the end of 2022, Benjamin Cox and Christopher Zinn completed their terms with thanks from the Code Authority and FIA for their service.



Position	Name	Appointed	Status	Term Number	Term Completes on
Chair	Peter Debnam	1 Feb 21	Current	2	Feb 25
Professional Member representative	Benjamin Cox	3 Nov 17	End of term 30 Nov 22	2	Nov 22
Board appointed Member	Christopher Zinn	30 Oct 18	End of term 30 Oct 22	2	Nov 22
Board appointed Member	Ashley Rose	30 Nov 19	Current	2	Nov 23
Board appointed Member	Karen Shields	17 June 20	Current	2	June 24
Board appointed Member	Nerida Wallace	1 Jan 22	Current	1	Feb 24
Board Representative	Shanthini Naidoo	1 July 21	Current	1	July 23

# Policy and Regulatory Affairs

## POLICY AND REGULATORY ENGAGEMENTS

In 2022, FIA continued to represent the interests of Members with its advocacy to government at all levels, as well as to stakeholders and the broader community. Policy submissions were made by FIA regarding:

- i) The Privacy Act Review
- ii) The Victorian Gambling and Liquor Legislation Amendment Bill
- iii) Reducing Scam Calls and Scam SMS Industry Code
- iv) The Western Australian Gaming and Wagering Commission Professional Fundraisers Fees Review
- v) The ABS Australia and New Zealand Standard Classification of Occupations Review
- vi) Mastercard's Revised Standards
- vii) Recommending FIA Membership as part of the forthcoming nationally consistent fundraising regulatory framework

FIA also consulted with several government agencies and private actors including the Commonwealth Treasury, NSW Treasury, the ACNC, NSW Fair Trading, Australia Post, and Mastercard among others. FIA's engagement with Mastercard on carve-outs for charitable regular giving donations was a notable win for the sector, resulting in Mastercard altering their initial approach to implementing their intended revised standards.

## HARMONISING FUNDRAISING LAWS

The harmonisation of fundraising laws remained a key regulatory theme throughout the year. FIA met with Dr Andrew Leigh MP, Assistant Minister for Competition, Charities & Treasury in July to discuss pertinent issues around the sector including the progress with the harmonisation of fundraising laws. In October, Dr Leigh and the Victorian Minister for Consumer Affairs indicated that nationally consistent fundraising conduct requirements would be released in late 2022. This framework is expected to adopt a principles-based approach aligned with existing regulatory codes such as the FIA Code.

## NEW FIA CODE PRACTICE NOTES

As part of our purpose to establish and promote high standards of fundraising ethics and practices, FIA published two new practice notes. The Digital Fundraising Practice Note and the Fundraising and Younger People Practice Notes were developed to assist FIA members when conducting fundraising through digital or any technology enabled means and in dealing appropriately with younger people as fundraisers and donors. The practice notes were endorsed at the Code Authority meeting in July.

# Membership

Membership to FIA signals a commitment to best-practice fundraising. It is the benchmark for fundraising excellence.

FIA supports members in helping them to fulfil their mission. We do this by:

- Developing and maintaining a self-regulatory regime in the FIA Code and consulting with government, influencers, and the community to set best practice standards and advance professional fundraising
- Advocacy on behalf of the fundraising sector on critical issues including reduction in red tape
- Providing ongoing professional development to improve fundraising skills and practice
- Developing comprehensive resources to support professional fundraising
- Hosting forums for the sharing of knowledge and experience

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

## MEMBERSHIP STRUCTURE

In 2021, FIA undertook a significant structural change to membership in order to provide members with greater value for money and to enable all fundraisers within a membership organisation access to the majority of FIA resources. This change also assists FIA to grow sector representation and set a path for future growth for all professionally committed members.

## KEY IMPROVEMENTS

Only FIA professional members have exclusive use of the member suffix which shows their commitment to their career and the profession. Fees for this type of membership were significantly reduced when their employing organisation is an FIA organisational member. In addition, organisational member became entitled to include their entire fundraising team to receive communications, discounts and access to FIA resources. No limits were given to the number of team members provided so information is now shared with more fundraisers, executives, board directors and volunteers.

## OUTCOMES IN 2022

Member feedback has been extremely positive, reflected in renewal rates of 93% up from 82% in 2021).

The number of organisational members has increased greatly, now exceeding 644. The number of supplier members has also increased likely stemming from charitable organisations' preference to working with suppliers who are Code compliant. As at 31 December, FIA had over 7,100 members, compared to 2,235 the previous year.

The total number of professional members has also increased from 543 to 642. With the increase in staff members on our database and the ongoing improvement of value, we trust the number of people taking professional membership will continue to increase.



## CELEBRATING DISTINGUISHED SERVICE

FIA promotes excellence in fundraising by recognising the achievements of our members. 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 2022

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	Sharon Hillman FFIA
Christine Anderson FFIA CFRE	Brian Holmes FFIA CFRE
Ross Anderson FFIA	Tanya Hundloe FFIA CFRE
Karen Armstrong FFIA CFRE	Jannine Jackson FFIA CFRE
Kristine Ash FFIA	Vicki James FFIA
Kel Beckett FFIA	Katherine John FFIA
Chris Benaud FFIA CFRE	Diane Kargas Bray AM FFIA
Dyls Bertelsen FFIA	Zoe Karkas FFIA
Jock Beveridge FFIA	Georgina King FFIA
Marcus Blease FFIA	Clare MacAdam FFIA CFRE
Francesca Cinelli FFIA CFRE	Stephen Mally FFIA CFRE
Leigh Cleave FFIA CFRE	Jeremy Maxwell FFIA CFRE
Gavin Coopey FFIA	Tracy McNamara FFIA
Benjamin Cox FFIA	Rebecca Miller FFIA
Bianca Crocker FFIA CFRE	Trudi Mitchell FFIA
Kerry Cutting FFIA CFRE	Shanthini Naidoo FFIA CFRE
Peter Dalton FFIA CFRE	Nicola Norris FFIA
Elizabeth Davis FFIA CFRE	Ginta Orchard FFIA
Leanne Dib FFIA	Martin Paul FFIA
Vicky Dodds FFIA	Vicki Rasmussen FFIA CFRE
Jennifer Doubell FFIA CFRE	Lesley Ray FFIA CFRE
Meredith Dwyer FFIA CFRE	Christine Roberts FFIA
Jackie Evans FFIA CFRE	Ashley Rose FFIA
Ron Fairchild FFIA CFRE	Andrew Sabatino FFIA
Paul Flynn FFIA	Tony Sanderson FFIA
Judy Ford FFIA CFRE	Wendy Scaife FFIA
James Garland FFIA CFRE	Margaret Scott FFIA CFRE
Jo Garner FFIA CFRE	Terri Sheahan FFIA
Dan Geaves FFIA	Bec Stott FFIA
Paige Gibbs FFIA	Paul Tavatgis FFIA
Allan Godfrey FFIA	Damian John Topp FFIA
Craige Gravestien FFIA CFRE	Jakki Travers FFIA
Nigel Harris AM FFIA CFRE	Alicia Watson OAM FFIA CFRE
Rebecca Hazell FFIA CFRE	Kerin Welford FFIA CFRE
Maurice Henderson FFIA FAHP CFRE	Ruth Wicks FFIA

Nola Wilmot FFIA  
Roewen Wishart FFIA CFRE  
Carl Young FFIA CFRE

Savas (Vic) Zacharias FFIA  
David Zerman FFIA

## EMERITUS MEMBERS AS AT 31 DECEMBER 2022

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)	Kenneth Harrison FFIA (Emeritus)
Graeme Bradshaw FFIA (Emeritus) CFRE	Margaret Haydon FFIA (Emeritus)
Gail Breen FFIA (Emeritus)	Jenny Marchionni MFIA (Emeritus)
Lyn Buckley FFIA (Emeritus)	Lindsay May OAM FFIA (Emeritus) CFRE
Jennie Cameron MFIA (Emeritus)	Graham McKern FFIA (Emeritus)
Peter Castleton FFIA (Emeritus)	Brian O'Keefe FFIA (Emeritus)
Ray Crompton MFIA (Emeritus)	Dennis O'Reilly FFIA (Emeritus)
Ronald Ellis OAM FFIA (Emeritus)	Leo Orland FFIA (Emeritus) CFRE
Raymond Fewell FFIA (Emeritus)	Dee Taseff MFIA (Emeritus)
Ted Flack FFIA (Emeritus)	John Townend FFIA (Emeritus)
Peter Fletcher FFIA (Emeritus)	Michelle Trevorrow FFIA (Emeritus)
Paul Freeman FFIA (Emeritus)	Bruno Yvanovich FFIA (Emeritus)
Anne Gribbin FFIA (Emeritus) CFRE	

## HONORARY MEMBERS AS AT 31 DECEMBER 2022

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.

Ms Michelle Campbell MFIA (Hon)  
Mr Douglas Dillon MFIA (Hon) CFRE  
Mr Michael Farrell MFIA (Hon)  
Mr Ian Fraser MFIA (Hon)  
Ms Mary Henderson MFIA (Hon)  
Ms Paulette Maehara MFIA (Hon)  
Mr Sid Mallory MFIA (Hon)  
Dr William McGinly MFIA (Hon)  
Professor Myles McGregor-Lowndes OAM MFIA (Hon)  
Mr Peter Sekulus MFIA (Hon)  
Mr Joe Shannon MFIA (Hon)  
Ms Ann Thompson-Haas MFIA (Hon)  
Mr Philip Warner MFIA (Hon)  
Mr Andrew Watt MFIA (Hon)

# Professional Education

## FORMAL EDUCATION PROGRAM

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 and a professionalised fundraising sector.

FIA's Professional Education Program 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.

314 hours of tutor-facilitated fundraising education was delivered in 2022 across 45 online and in-person courses to 634 participants across Australia, demonstrating FIA's national reach and significance as a training institute. All short courses were delivered online, in addition to the delivery of Fundraising Essentials for general participants as well as two in-house offerings: World Vision Australia and the Jodie Lee Foundation. Amongst the short courses offered was FIA's 2-hour Managing Vulnerability workshop, successfully delivered eight times in 2022, providing guidance and training to those fundraisers working with vulnerable donors after sector-wide skills deficits and risks were identified in preceding years.

2022 marked the return of in-person education, with the Certificate in Professional Fundraising running between September and November in Sydney and Melbourne, whilst Fundraising Essentials was successfully offered in Brisbane, Sydney and Melbourne across September and October. A 'Fundraising for Boards' in-house training was also delivered in-person to Motor Neurone Disease Association Queensland.

FIA's Core Education (Fundraising Essentials, Gifts in Wills Essentials, Certificate in Professional Fundraising and Diploma in Professional Fundraising) continued to be offered in a self-paced, e-learning mode. 113 learners successfully completed FIA's Core Education in 2022.

We would like to take this opportunity to thank all of the tutors and facilitators who contributed to the 2022 Professional Education Program.

## CORE EDUCATION

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

- **Chris Benaud FFIA CFRE**  
Development Manager, The Buttery  
Course: Diploma in Professional Fundraising
- **Margaret Scott FFIA, CFRE (Retired)**  
Fundraising Consultant and Director, Margaret Scott & Associates  
PhD Candidate (QUT)  
Course: Diploma in Professional Fundraising

- **Maisa Lopes Gomes 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
- **Bianca Crocker FFIA, CFRE**  
Community Change Architect, Fish Community Solutions  
Courses: Certificate in Professional Fundraising, Fundraising Essentials
- **Heiko Plange-Korndorfer FFIA, CFRE**  
Director Fundraising and Commercial Development, Perth Zoo  
Courses: Certificate in Professional Fundraising
- **Ellaine Hislop EMFIA, CFRE**  
Fundraising and Philanthropy Supervisor, Surf Life Saving WA  
Courses: Certificate in Professional Fundraising
- **Cherie Smith MFIA, CFRE**  
Individual Giving Manager, RSPCA Queensland  
Course: Fundraising Essentials
- **Rebecca Miller FFIA**  
National Fundraising Manager  
Disaster Relief Australia  
Courses: Certificate in Professional Fundraising, Fundraising Essentials

## SHORT COURSES & WORKSHOPS

- **Natalie Khoo**  
Founder & CEO, Avion Agency  
Course: Copywriting Essentials
- **Leigh Cleave FFIA, CFRE**  
Director, Cleave Consults  
Course: Major Giving – developing the people and the program
- **Jonathan Dawson**  
Managing Director, Digital Ninjas  
Course: Digital Gifts in Wills – How to Grow Your Database of Confirmed Gifts in Wills Donors
- **Heiko Plange-Korndorfer FFIA, CFRE**  
Director Fundraising and Commercial Development, Perth Zoo  
Courses: Managing Vulnerability, Navigating the Fundraising Regulatory Environment
- **Kate Parsons**  
Major Gifts & International Program Manager, Bush Heritage  
Course: Attracting Major Gifts
- **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 Managing Director, 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: Supporter Experiences Designed Using Behavioural Economics
- **Maisa Lopes Gomes EMFIA**  
Head of Digital Fundraising, Cerebral Palsy Alliance  
Course: Digital Fundraising for Donor Retention
- **Hailey Cavill-Jaspers & Georgia McIntosh**  
Founders, BePartnerReady  
Webinar: Get Ready for Corporate Partnerships
- **Susan Pizatti**  
Industry Engagement & Translation Manager, Centre for Social Impact, Swinburne University  
Course: Fundraising Research & Insights Discussion Group
- **Mark Anscombe**  
Fundraising & Engagement Specialist, The Wilderness Society  
Course: Successfully Managing Outsourced F2F Fundraising
- **Tony Nicholls**  
Director and Principal Consultant, Good Talent Media  
Course: From Zero to Hero – how to get your stories in the media

## NATIONAL MENTORING PROGRAM 2022-2023

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 career advice, offer support and improve their understanding of fundraising and the not-for-profit sector.

The 2022-2023 Mentoring Program began in early September, with 91 mentor-mentee partnerships, which was an increase of 13 partnerships compared to 2021-2022. This year's program includes an enhanced online workshop series that has responded to feedback from previous years' evaluations, in addition to a formal welcome and orientation session to launch the program.

For 2022-2023 there appeared to be an increase in the number of mentee applications with significant fundraising experience and who held more senior and executive positions. For 2023 FIA is exploring the possibility of different mentoring program streams or an alternative program for senior fundraising leaders seeking mentoring or career support.



FIA would like to thank the Matching Panel who volunteered their time and expertise to this year's mentoring pairs:

- **Grainne Tierney MFIA, CFRE**  
Head of Corporate & Community Partnerships, Camp Quality
- **Leigh Cleave FFIA, CFRE**  
Director, Cleave Consults
- **Roxy Kavanagh MFIA**  
Head of Philanthropy & Partnerships, The Song Room
- **Sally Shepherd**  
Executive Manager Marketing & Membership, FIA
- **Mary Anne Plummer MFIA**  
Creative Director, Exuberance

A special acknowledge should also be made to the facilitators who have contributed to the robustness of this year's workshop program:

- **Georgina King FFIA**  
Founder, Raucous Caucus
- **Andy Rooke**  
Director, Grey Matters Business Advisory
- **Helen Merrick MFIA**  
GM – Fundraising & Marketing, Mission Australia

## SCHOLARSHIPS

Contributing to the development of its membership, FIA offered three scholarships in 2022.

### FRANK CHAMBERLIN SCHOLARSHIP

After founding copywriting consultancy, Action Words, Frank Chamberlin was engaged by hundreds of fundraising organisations and professionals for his expertise in fundraising copywriting fundraising. Frank developed and delivered Copywriting for Fundraising for FIA since 2012 and in 2020 retired after making a significant positive impact on FIA members and the broader fundraising sector.

The Frank Chamberlin Scholarship is awarded each year to one early career fundraiser to undertake FIA's Copywriting Essentials course online. This year the scholarship recipient was Amy Groundwater, Direct Marketing Coordinator at Royal Far Out West.

### LEO ORLAND – FIA FOUNDATION SCHOLARSHIP

This scholarship is offered by the FIA Foundation in honour of fundraising legend Leo Orland, to enable an early career fundraiser to gain a comprehensive foundation in best practice fundraising by studying the FIA's Certificate in Professional Fundraising.

The 2022 scholarship recipient was Renee Mason, Individual Giving Coordinator at The Wilderness Society.

### BMS SCHOLARSHIP

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 2022 scholarship was awarded to Angela Ryan, Community Fundraising Manager at Camp Quality.

## **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. FIA would like to acknowledge these individuals for their dedication to their fundraising and non-profit careers.

### **STUDY SESSIONS**

Supporting members embarking on their CFRE credential, in 2023 FIA offered 18 hours of CFRE exam preparation throughout the year, aligned with the exam testing windows. Eight participants from this year's sessions were successful in gaining their CFRE certification.

FIA would like to acknowledge and thank Leo Orland EFFIA, CFRE for all of his time, dedication, contributions and service to the CFRE study sessions in 2022.

## **LEARNING MANAGEMENT SYSTEM (LMS) FOR 2023**

In May 2022, the FIA Board approved budget for the purchase and implementation of a new LMS for FIA's Professional Education, which is due for to be launched in early 2023. This significant investment will allow for greater scope of course content and delivery and provide a contemporary, professional and user-friendly learning experience.

We would like to thank our CEO, Katherine Raskob, the FIA Board and the Professional Development Subcommittee for their belief in and commitment to FIA's future as a leader in Australian fundraising education and professional development.

## **HEALTHCARE PHILANTHROPY EVENT PROGRAM COMMITTEE**

The second annual FIA/AHP Healthcare Philanthropy Event was held online over two days in May. FIA thanks the program committee for their generous time and talent in developing the event.

**Nigel Harris AM FFIA CFRE, Nigel Harris & Associates (Chair)**

**Ron Fairchild FFIA CFRE, Monash Health Foundation**

**Lesley Ray FFIA CFRE, Mater Foundation**

**Vicki Rasmussen FFIA CFRE, Charlies Foundation for Research**

# FIA Conference 2022



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 to 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.

Despite being postponed, **FIA Conference 2022** was an amazing success, held at the ICC Sydney from 2-4 June. A huge thank you to our committee, supporters and speakers who worked on FIA Conference 2022.

## FIA CONFERENCE PROGRAM COMMITTEE

We would like to say thank you to the 2022 FIA Conference Program Committee for all their hard work and dedication.

Nicola Long MFIA (Chair)	Luke Edwards
Alice Anwar (Co-Chair)	Paige Gibbs FFIA
Andy Grant	Elizabeth Grady
Raquel Dillon MFIA	Alan White MFIA CFRE
Nuz Hameed MFIA	Alix Katala MFIA
Angela Motta MFIA	Rochelle Nolan
Francine Poisson	Bethan Hazell
Leila Davis MFIA	



## FIA CONFERENCE SUPPORTERS

Conference Partner



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## FIA CONFERENCE SPEAKERS

Aaron Zelman	Julia Balderstone	Rebekah Trachsel CFRE
Adam Watson MFIA	Julia Cameron	Richenda Vermeulen
Alan White MFIA CFRE	Julianne Wilkin	Rob Needham MFIA CFRE
Alana Zerek	Katherine Spiller	Rob Novotny
Amanda Schofield	Katie Farina MFIA	Rochelle Nolan
Amy Womersley	Kellie O'Sullivan	Roewen Wishart FFIA CFRE
Andrew Martin	Kerren Morris MFIA	Ruth Knight
Antonia Makkar MFIA	Kirsty Graham MFIA	Ruth Wicks FFIA
Ashley Rose FFIA	Lachlan Dale	Sam Bloom
Ashley Rowthorn	Laura Carolan-Scott	Saman Kazmi
Beth Cross	Laura Stokes	Sani Dowa
Bridgit Allingham	Lauren James	Sarah Wetton MFIA CFRE
Carly Fradgley	Lauren Jenkins	Shanelle Newton-Clapham MFIA
Cath Hoban	Laurie McPherson	Shivangi Chaturvedi
Cherie Barker	Leonard Elario	Sophia Lacey
Coby Hailes MFIA	Liesha Hanekroot MFIA	Stacey Irving
Danni Adam	Lisa Allan FFIA	Stan Grant
Eddie O'Loughlin	Lisa Miller MFIA	Steffi Chang MFIA CFRE
Ellaine Hislop EMFIA	Lisa Shipman	Stephen Lewin
Felicia Setyabudi	Louise Baxter	Stuart Ghent
Fiona McPhee MFIA	Lucas Patchett OAM MFIA	Susan Henry
Francesco Ambrogetti	Luke Edwards	Tamara Kahil
Garth Stirling	Madeleine Estherby	Tania Ahmed
Gavin Coopey FFIA	Madeleine Richards	Tasman Cassim
Georgia Mathews	Maisa Lopes Gomes EMFIA	Tatiana Isaacs
Gina Chowdhury	Marcus Blease FFIA	Tim Kachuriak
Helen Wright	Maree (Missy) Daniels EMFIA	Tim Landsbergen
Ian Lawton	Mary Anne Plummer MFIA	Tim Paris
Jakki Travers FFIA	Matthew Geraghty	Tim Ryan
James Freeman OAM	Matthew Jones	Tom Duggan CFRE
James Garland FFIA CFRE	Meredith Dwyer FFIA CFRE	Tori Burns CFRE
James Stanton-Cook	Michelle Folder MFIA	Tracey Martinovich
Jasmine Coronado	Nicola Long MFIA	Trudi Mitchell FFIA
Jenny Kearney	Nicole Guerini	Umesh Paramasivam MFIA
Jeremy Bennett	Nigel Harris AM FFIA CFRE	Vicki Rasmussen FFIA CFRE
Jessica Clarke	Nikki Firmin	Wendy Scaife FFIA
Jo Garner FFIA CFRE	Owen Valentine Pringle	Zoe Amar
Jody Crooks	Peter Dalton FFIA CFRE	
Jonathon Grapsas	Rebecca Oates	



# FIA Awards for Excellence in Fundraising 2022

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



## 2022 AWARDS ADVISORY COMMITTEE

- Chair: Benjamin Cox FFIA, Chief Executive Officer, Gold Coast Hospital Foundation
- Allan Godfrey FFIA, Chief Marketing Officer, Royal Life Saving Society WA
- Lucy Jacka, General Manager Fundraising, Cerebral Palsy Alliance NSW
- Sharon Elliott MFIA, Chief Executive Officer, Ethiopiaid Australia
- Cassie Magin EMFIA, General Manager, Vitalstatistix
- Cameron Glover MFIA, Chief Executive Officer, Interplast Australia & New Zealand
- Deena Yousif Dennis, Philanthropy Manager, The Smith Family
- Tessa Irwin EMFIA CFRE, Senior Manager, Campaign, Museum of Applied Arts and Sciences (Powerhouse)
- Christine Diamond CFRE, Major Gifts Development Lead, Vision Australia



## JUDGES

We would like to thank all our 2022 judges for their time and effort.

### NATIONAL JUDGES

#### National Panel 1:

**Arthur Venn Lifetime Achievement Award  
Most Outstanding Fundraising Project  
(judged from winners of awards 1-8)**

#### Judges:

Benjamin Cox FFIA, Gold Coast Hospital Foundation  
Katherine Raskob MIM GAICD, FIA  
Jo-Anne Reeves MFIA, Parkinson's NSW Inc  
John Burns, North Melbourne Football Club

#### National Panel 2:

**Fundraising Champion of the Year  
Fundraiser of the Year**

#### Judges:

Sharon Elliott MFIA, Ethiopiaid Australia  
Ben Holgate MFIA, Multiple Sclerosis Ltd.  
Allan Godfrey FFIA, Royal Life Saving Society WA  
Meredith Dwyer FFIA CFRE, FIA Board Chair,  
HomeMade Digital

### STATE PANEL 1

Andrew Sabatino FFIA, Donor Republic  
Francesca Cinelli FFIA  
Nola Wilmot FFIA, The Florey Institute of  
Neuroscience and Mental Health  
Kerry Cutting FFIA CFRE, Guide Dogs  
Queensland  
Heiko Plange-Korndoerfer FFIA CFRE,  
Endeavour Marketing  
Judith Ford FFIA CFRE, Heart Support  
Australia

### STATE PANEL 2

Bec Stott FFIA, Anglicare WA  
Clare MacAdam FFIA CFRE, Baptist Care SA  
Diane Kargas Bray AM FFIA, Diane Kargas  
Consulting  
Ron Fairchild FFIA CFRE, Monash  
Foundation  
Stephen Mally FFIA CFRE, FundraisingForce  
Vicki James FFIA, Gold Coast Hospital  
Foundation

### CAMPAIGN CATEGORIES

#### Panel 1:

1. Most Innovative Campaign
2. Best Supporter Experience

#### Judges:

Deena Yousif Dennis, The Smith Family  
Christine Diamond CFRE, Vision Australia  
Rachel Murphy MFIA, Heart Foundation  
Aaron Crowther MFIA, St John Ambulance WA

#### Panel 2:

4. Impact Through Events
5. Fundraising Impact Through Technology

#### Judges:

Lucy Jacka, Cerebral Palsy Alliance  
Christa Bayer MFIA, Lung Foundation Australia  
Elizabeth Davis FFIA CFRE, Raising Literacy Australia  
Stephen Bastow MFIA, Cystic Fibrosis WA

#### Panel 3:

6. Impact on a Shoestring
8. Best Strategic Partnership

#### Judges:

Tessa Irwin EMFIA CFRE, Museum of Applied Arts and  
Sciences (Powerhouse)  
Hazel Grunwaldt EMFIA, Camp Quality Ltd  
Leo Orland FFIA (Emeritus) CFRE, Total Fundraising  
Lisa Allan FFIA, The Smith Family

#### Panel 4:

7. Best Pivot Campaign or Initiative
9. Supplier Team of the Year

#### Judges:

Cameron Glover MFIA, Interplast Australia & New Zealand  
Ally Murray MFIA, The Wilderness Society Ltd  
Jackie Evans FFIA CFRE, The Indigo Foundation  
Vicki Rasmussen FFIA CFRE, Charlies Foundation for  
Research

#### Panel 5:

3. Fundraising Impact Through Creativity

#### Judges:

Cassie Magin EMFIA, Vitalstatistix  
Sharon Hillman FFIA, Beyond Blue  
Nicci Dent, Heart Research Australia  
Claire Baxter MFIA, Kidney Health Australia



## 2022 CAMPAIGN AWARDS

### MOST INNOVATIVE CAMPAIGN

#### Winner

Lighthouse Foundation, *#BREAKTHEPATTERN*

#### Finalists

Flying Doctor Service (Western Operations), *Flying Doctor Day*

Plan International Australia, *Girls Education & Empowerment Fund*

Children's Cancer Institute, *Children's Cancer Institute's CEO Dare to Cure*

### BEST SUPPORTER EXPERIENCE

#### Winner

MS Queensland, *Best at Thank you*

#### Finalists

Surf Life Saving Western Australia, *SLSWA Beach Champions*

World Animal Protection, *The Protector (quarterly newsletter for Animal Protectors)*

Children's Cancer Institute, *2020/21 Regular Giving EOFY Campaign*

### FUNDRAISING IMPACT THROUGH CREATIVITY

#### Winner

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

#### Highly Commended

The Smith Family, *"I had no idea" – The Smith Family – Child Sponsorship DRTV Campaign*

Harry Perkins Institute of Medical Research, *Perkins Steps to Better Health Campaign*

#### Finalists

UNICEF Australia, *Nomii the UNICEF Reindeer's Christmas Delivery*

Wayside Chapel, *Wayside Chapel's Winter Appeal 2021*

Royal Flying Doctor Service Victoria, *Flying Doctor Memory Lane – The memory of a lifetime*

CBM Australia, *2021 Save Sight "Hope Grower" Campaign*

### IMPACT ON A SHOESTRING

#### Winner

Bears of Hope Pregnancy & Infant Loss Support Inc, *Choosing Hope – A Walk of Honour & Remembrance in support of bereaved families*

#### Highly Commended

Bendigo Health Fundraising & Foundation, *How a Christmas Appeal evolved a centre for paediatric excellence*

#### Finalists

Launceston City Mission, *City Mission Winter Appeal*

Glaucoma Australia, *End of Financial Year Appeal 2021*

Engineers Without Borders Australia, *EWB On the Ground Appeal*



## BEST STRATEGIC PARTNERSHIP

### Winner

Brotherhood of St Laurence, *Brotherhood of St Laurence and Citi Foundation: Youth Employment*

### Highly Commended

Australian Red Cross, *Red Cross/Save the Children/QBE Global Disaster Relief and Resilience Partnership*  
The Smith Family, *Ampol and The Smith Family*

### Finalists

The Salvation Army, *The Salvation Army & Woolworths Group: S.T.A.N.D partnership*  
McGrath Foundation, *McGrath Foundation, Cricket Australia and the SCG – a True Partnership*  
Australian Red Cross, *Australia Post & Australian Red Cross – Supporting communities before, during and after disasters*

## IMPACT THROUGH EVENTS

### Winner

Children's Cancer Institute, *Children's Cancer Institute's CEO Dare to Cure*  
Cancer Council NSW, *The Longest Day*

### Highly Commended

Harry Perkins Institute of Medical Research, *Walk for Women's Cancer*

### Finalists

Soldier On, *March On with Soldier On*  
Asylum Seeker Resource Centre, *Feast for Freedom (2021)*  
Leukaemia Foundation, *Light the Night 2020*  
Wayside Chapel, *Wayside Chapel's Long Walk Home 2020*

## BEST PIVOT CAMPAIGN OR INITIATIVE

### Winner

Wayside Chapel, *Wayside Chapel's Long Walk Home 2020*

### Finalists

Peter MacCallum Cancer Foundation, *Uniting and empowering the community to Fight Cancer their way, during a time of isolation, lockdowns and travel restrictions*  
The Salvation Army, *Turning the Red Shield Appeal doorknock into a digital one*  
Bears of Hope Pregnancy & Infant Loss Support Inc, *Choosing Hope – A walk of honour & remembrance in support of bereaved families*  
Catholic Mission, *Socketober 2020*

## FUNDRAISING IMPACT THROUGH TECHNOLOGY

### Winner

Telco Together Foundation, *Small Change Big Change*

### Highly Commended

World Animal Protection, *Digital Acquisition Gifts in Wills Campaign*

### Finalists

Lighthouse Foundation, *#BREAKTHEPATTERN*

## SUPPLIER TEAM OF THE YEAR

### Winner

Donor Republic *Nominated by: Foodbank NSW & ACT*

### Highly Commended

Adflex Marketing *Nominated by: Royal Life Saving Society WA*  
Engage & Experience *Nominated by: Vision Australia*

## ARTHUR VENN LIFETIME ACHIEVEMENT AWARD

### Winner

Roewen Wishart FFIA CFRE

## FUNDRAISER OF THE YEAR

### Winner

Carl Young FFIA CFRE

## FUNDRAISING CHAMPION OF THE YEAR

### Joint Winner

Sister Angela Mary Doyle, Mater Foundation

### Joint Winner

Cameron Kerr AO, Taronga Conservation Society Australia

## YOUNG FUNDRAISER OF THE YEAR

### National Winner

Tom Hansford

### National Highly Commended

Alexandra Dobbing MFIA

### State Winner

Grace Burnfield, WA

### State Highly Commended

Rebecca Stone, NSW

Meaghan Donaldson, VIC

## VOLUNTEER OF THE YEAR

### National Winner

Betty Webb, The Smith Family, WA

### State Winner

Josie Dincel, Sydney Children's Hospital Foundation, NSW



# Include a Charity



Include a Charity is a social change campaign of Fundraising Institute Australia and our core purpose is to encourage more people to leave a gift in their will. This is achieved through a broad public-facing behavioural change campaign alongside direct support for gifts in will fundraisers in our member charities. Include a Charity is a collaboration of many charitable organisations, and we cover a range of causes - from health, medical research, education and animal welfare to the environment, community services, the arts and more. We also advocate for change and best practice with government and estate planning professionals to help and support the public and charitable sector. By supporting more people to leave a gift in their will to the causes they are passionate about we will expand the positive impact of charities in our society.

Since the last annual report, a new Campaign Director, Helen Beeby, and Campaign Coordinator, Madison Wenaden have been appointed. Helen worked with Madison's predecessor, Maya Sapieka, to develop the strategy and map out a calendar of events and activities for the rest of the year. It has been a very successful year.

## 2022 ACTIVITIES

### PUBLIC CAMPAIGN:

- 2-3 social media posts per week
- Blog articles: used across print media, social media, website
- Website redesign and development/marketing
- Wills & Legal Task Force established
- Podcasts
- Include a Charity Week (September 5-11)

**INCLUDE A CHARITY**  
Make your mark

**Member-Exclusive Training Day**

**Sticky Donors: Stewardship, circles and lifelong relationships**

**In Person and Online**

**Date: Thursday 19 May 2022**  
**Time: 10:00am**  
**Venue: Stroke Foundation Melbourne**

**INCLUDE A CHARITY**  
Make your mark

**LEGACY Voice**

**Member-Exclusive Bonus Webinar Event**

**Diversity in Legacy Fundraising: Countering White Saviourism**

- Date: Friday 22 April 2022
- Time: 3.00pm - 4.00pm AEST
- Location: Zoom

**Dr Claire Routley**  
Head of Legacy Consultancy at Legacy Voice UK

## INCLUDE A CHARITY ADVISORY COMMITTEE 2022

### 16 March – Training Day

Compassionate Conversations: Australian Centre for Grief & Bereavement

### 19 April – Member Exclusive Webinar Event

Gifts in Wills benchmarking insights: Lunch & Listen – Karen Armstrong

### 22 April – Member Exclusive Webinar Event

Diversity in Legacy Fundraising: Countering White Saviorism– Dr Claire Routley

### 19 May – Face to face/hybrid Training Day

Sticky Donors: Stewardship, bequest circles and lifelong relationships

### 30 November – Training

Stephen George follow up webinar

### 8 December – Special Interest Group

IAC Campaign Effectiveness Report and Christmas Networking

## FIA CONFERENCE 2-5 JUNE

Include a Charity had a presence at the in-person conference on the FIA stand and networked with current and potential members. We also included calendar inserts and member benefits collateral in the conference satchels.



## IAC HEART & SOUL ONLINE CONFERENCE 28 JULY

Include a Charity hosted a successful one-day conference on gifts in Wills fundraising. The event was attended by 112 members and over 90 non-members.

- Welcome and Keynote: From Baby Steps to Great Strides - *Ellaine Hislop, Surf Life Saving, WA.*
- Keynote: Keeping it real – making successful connections with Wills Days - *Stephen Burfield, Wesley Mission NSW.*
- Interview: Would you believe it...? Fascinating estate planning stories and insights - *Rohani Bixler, Burke Lawyers, Michele Davis, Inspire Estate Law & Mediation, Helen Beeby, FIA*
- Panel: Alternative channels and donor care - Video and Polls - *Ross Anderson, The Lost Dogs Home, Helen Trussler, RSPCA NSW, Teneale Cameron, Cancer Council NSW.*
- Keynote: Searching for the soul in the digital realm – where creativity meets application- Breakout Rooms - *Jonathan Dawson, Digital Ninjas*
- Keynote: The power of story | Quiz: Fame, I'm (not) gonna live forever – Closing - *Russell James & Ashley Rowthorn*



### Online Conference post-survey comments

- “I really like how it is connected now and the MC was amazing. I like it and the chat engagement too is good.” **MS Plus**
- “Gifts in wills is the most undervalued fundraising area and IAC is taking up the cause, increasing awareness among our communities with enthusiasm and professionalism which will assist greatly in changing this perception.” **UNSW**
- After working in the Gift in Wills space for the past 18 years and attending the Heart & Soul Conference I was energised at the end of the day from what I had heard, discussed and seen. I was excited to implement some new ideas into my own program.” **St Vincent de Paul**

## SECTOR LEADERSHIP

### Research

- More Impact – Benchmarking and Campaign Effectiveness
- Legacy Futures UK – Boomers and NextGen analysis
- Bequest Assist – Chris Baker 10 years on



### Best practice

- Member trainings and Special Interest Groups
- International consortiums collaboration
- Sector collaborations – Philanthropy Australia, estate planners, field experts

### Policy and advocacy

- Philanthropy Australia – Minister Andrew Leigh: double-giving by 2030
- Wills & Legal Task Force and Subcommittees – comprises estate planners, online wills, sector partners, GIW fundraisers

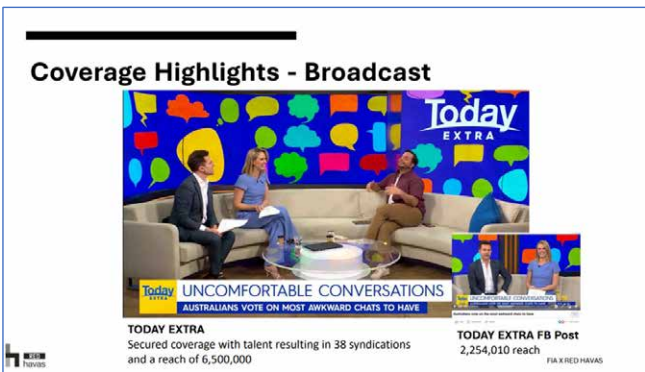
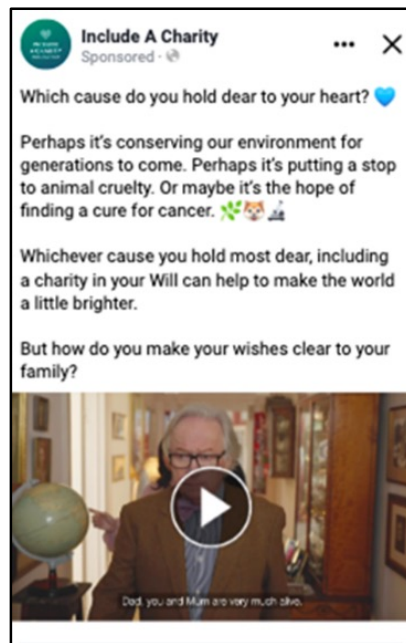
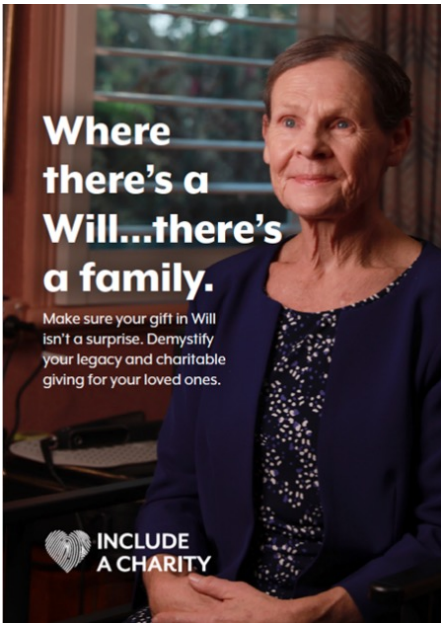
## INCLUDE A CHARITY WEEK 5-11 SEPTEMBER

IAC worked with partner Marlin Communication, videographer MediaUnitB and Red Havas PR to develop and deliver a widespread media and digital campaign and Member Assets for IAC members to use in their own IAC Week campaigns.

### Proposition:

**To ensure your legacy lives on, Include a Charity in your Will and share your wishes for a better future with your loved ones.**

Total Audience Reach and Engagement = 10,516,785



## STEPHEN GEORGE ROADSHOW

We also ran an in-person roadshow in five states with the UK's leading gifts in wills expert Stephen George, long with an online bonus webinar with him as a follow up.



## ADVISORY COMMITTEE

IAC thanks the advisory committee members who provide insight and expertise to assist the running of this campaign.

Outgoing Committee members:

Paul Evans, Makinson d'Apice  
Jennifer Maher, Velocity Legal  
Rebecca Miller FFIA, Disaster Relief Australia  
Sam Allen, Oxfam  
Hannah Cifuentes, UNICEF  
Marcus Blease FFIA, Donor Republic

## WILLS & LEGAL TASK FORCE

Rohani Bixler, Sage Legal  
Ross Anderson FFIA, Lost Dogs Home  
Adam Herodotus, Gathered Here  
Elena Di Palma, Safewill  
Ashley Rowthorn, Legacy Futures  
Maureen Koegel, Bequest Assist  
Rebecca Stalenberg, MS Plus  
Jonathan Ande, FIA



# FIA Foundation



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

The FIA Foundation exists primarily to advance and develop the training and education of professional fundraisers. It provides access to professional fundraising resources, facilitates sector 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 resources; and
- promote research into the fundraising sector.

## 2022 ACTIVITIES

The Foundation Committee, chaired by Vicki Rasmussen FFIA CFRE advanced a number of activities for the Foundation, including finalising a new case for support of the Foundation. It also forged a partnership with leading agency Dalton Garland Blanchard to undertake a feasibility study for a major gifts program for the Foundation.

FIA gratefully acknowledges the pro bono support of Dalton Garland Blanchard for this project and its continued support of the FIA Foundation.



*Vicki Rasmussen  
FFIA CFRE, Chair  
The Foundation  
Committee*

# DGB

# 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.

## 2022 WA COMMITTEE

Ellaine Hislop EMFIA CFRE (Chair)  
Vicki Rasmussen FFIA CFRE  
Andrea Alexander EMFIA  
Paul Ineson MFIA  
Lisa Miller MFIA  
Stephen Ellis AMFIA  
Clara Millet MFIA  
Brooke Webb MFIA  
Laura Kazmirowicz EMFIA  
Sabrina Thomas MFIA  
Ferdie Fourie (Resigned)  
Addy Wetzler MFIA (Resigned)



## 2022 SA/NT COMMITTEE

Cassie Magin EMFIA (Chair)  
Rebecca Miller FFIA  
Julie Calvert MFIA  
Alix Katala MFIA  
Maurice Henderson FFIA FAHP CFRE  
Anthea Rice MFIA  
Sarah Davies MFIA  
Sam Jacklin MFIA  
Tracy McNamara FFIA (Resigned)  
Bonnie Allmond (Resigned)



## 2022 QLD COMMITTEE

Victoria Andrews MFIA CFRE (Chair)  
Benjamin Cox FFIA  
Cherie Smith MFIA CFRE  
Vicki James FFIA  
Erin McCabe MFIA  
Rowan Foster FFIA CFRE  
Matthew Lang MFIA CFRE  
Claire Hughes MFIA CFRE  
Angela Motta MFIA  
Sarah Collie MFIA  
Ann Hutchinson MFIA  
Christine Anderson FFIA CFRE



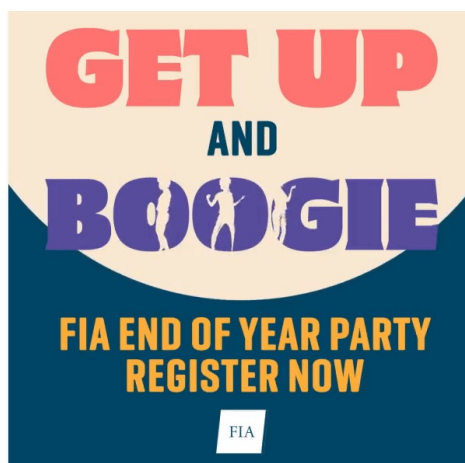
## 2022 TAS COMMITTEE

Erica Larke-Ewing MFIA (Chair)  
Michelle Folder MFIA  
Cath Adams MFIA  
Rebecca Townsend MFIA  
Rebecca Cuthill MFIA  
Lauren Harper MFIA  
Brad Watson (Resigned)



## 2022 NSW COMMITTEE

Anthea Cohen MFIA (Chair)  
Stephen Mally FFIA CFRE  
Tessa Irwin EMFIA CFRE  
Cara Morrison MFIA CFRE  
Maisa Lopes Gomes FFIA  
Umesh Paramasivam MFIA  
Alexandra Dobbing MFIA  
Nicola Long MFIA  
Leisha Hanekroot EMFIA  
Natasha Poulos MFIA  
Tara Tan MFIA  
Grainne Tierney MFIA



## 2022 VIC COMMITTEE

Karen McComiskey MFIA CFRE (Chair)  
Alan White MFIA CFRE  
Antonia Makkar MFIA  
Francesca Barnett  
Lauren Jenkins MFIA  
Hazel Grunwaldt MFIA  
Lynne Kearney MFIA  
Emily Lewis MFIA  
Kathryn Crowley MFIA  
David Craig MFIA  
Roxy Kavanagh MFIA (Co-opted)  
Cory Hall MFIA (Resigned)

## THE AGONY AND ECSTASY OF PHILANTHROPY AND FUNDRAISING

WITH KEYNOTE SPEAKER  
KAREN BROOKS HOPKINS



EVENT PARTNER  
Give2Asia  
AUSTRALIA

Thursday 10 November 2022

Joined by Co-Panellists Frankie Airey and Steffi Chang MFIA CFRE  
Facilitated by Anita Toy

## 2022 ACT COMMITTEE

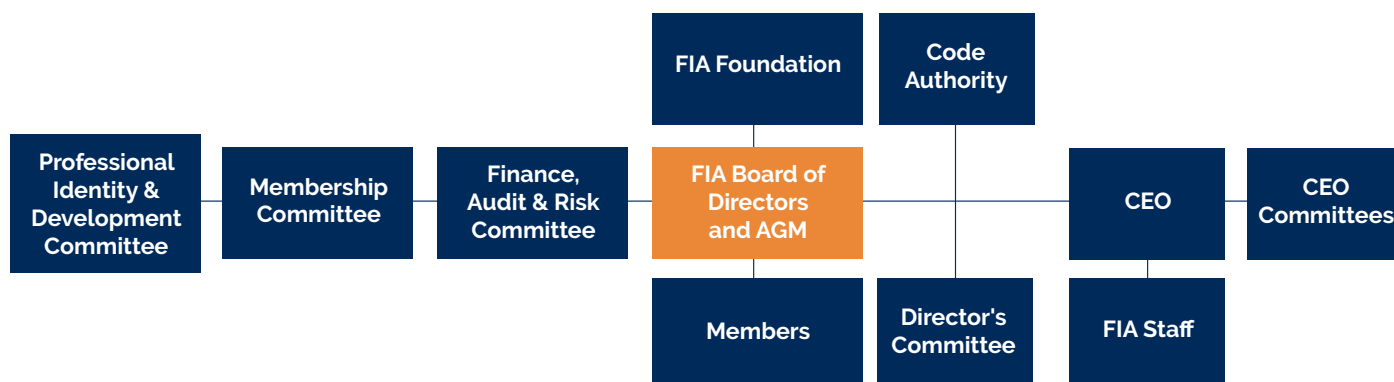
Angela Harrison MFIA (chair)  
Jason Haines MFIA  
Judy Ford FFIA CFRE  
Tammy Foley AMFIA  
Trevor Capps EMFIA  
Diane Kargas Bray AM FFIA



ACT- Are we ready for the transfer of wealth  
from the baby boomers?

# 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 2022

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 2022.



## CHAIR

### **Meredith Dwyer FFIA CFRE GAICD**

Director, Homemade Digital

Appointed Director March 2018; Appointed Chair 2020; QLD Presenter 2010 - present; NSW Presenter 2015, 2016, 2017; WA Presenter 2016, 2018; SA Presenter 2017, 2018; FIA QLD 2010, Chair 2017 - present; Conference Committee 2012, 2016; Conference Speaker 2016, 2017; Awards Judge 2015 – present.



## DIRECTOR (QUEENSLAND) APPOINTED VICE CHAIR 24.2.22

### **Ben Cox FFIA**

CEO, Gold Coast Hospital Foundation

Appointed Director February 2020, 2012-2017; Chair Finance, Audit and Risk Committee since 2021;

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

Awards Judge 2014-2015; Code Authority 2017-present.



## VICE CHAIR

### **Paul Flynn FFIA MAICD** (Resigned 24.2.22)

Chief Executive Officer, The Hospital Research Foundation

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



## BOARD APPOINTED DIRECTOR

### **James Garland FFIA CFRE** (Resigned 24.2.22)

Director, Dalton Garland Blanchard

Chair 2018-2019, Appointed Director March 2016; Chair Nominations

Committee; Awards Judge 2016; VIC Presenter 2014; Conference Committee 2014, 2015; Conference Speaker 2015, 2016.



## DIRECTOR (WESTERN AUSTRALIA)

### **Vicki Rasmussen FFIA CFRE**

Executive Director, Charlies Foundation for Research; Appointed Director, February 2019.

Chair of Fellows and Emeritus Nominations Committee: Chair FIA

Foundation Committee; Member FIA WA Committee 2018 to present; FIA

Conference Speaker 2019; Arthur Venn Fundraiser of the Year 2017; FIA

Conference Program Chair 2016



**BOARD APPOINTED DIRECTOR**

**Belinda Dimovski MFIA**

Appointed Director, February 2022; Member Professional Development and Identity Committee



**DIRECTOR (VICTORIA)**

**Alan White MFIA CFRE**

Deputy CEO, Plan International;  
Appointed Director, February 2020, Co-opted March 2019; Member Membership Committee; 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; Member Membership Committee since 2019; FIA NSW Committee 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**

Senior Manager, Communications and Fundraising, Hobart City Mission  
Appointed Director March 2018; FIA TAS 2015 – Present; Member Professional Development and Identity Committee 2019 to present.



**BOARD APPOINTED DIRECTOR**

**Dr. Jim Hungerford MFIA GAICD**

Chief Executive Officer, The Shepherd Centre  
Member Finance, Audit & Risk Committee since 2018  
Appointed Director March 2018; Awards Judge 2015.



**BOARD APPOINTED DIRECTOR**

**Shanthini Naidoo FFIA CFRE GAICD**

Chief Executive Officer, St Vincent's Curran Fundraising  
Appointed Director March 2021; Code Authority 2021



**DIRECTOR (SOUTH AUSTRALIA/NORTHERN TERRITORY)**

**Rebecca Miller FFIA**

National Fundraising Manager, Disaster Relief Australia;  
Appointed Director March 2021; FIA SA/NT Committee 2016 to present;  
Member Professional Development & Identity Committee 2021  
Member Include A Charity Advisory Committee since 2021



**ORGANISATIONAL MEMBER DIRECTOR**

**Lisa Allan FFIA**

Head of Fundraising, The Smith Family  
Appointed Director March 2021; Awards judge 2016, 2021; Conference Committee 2017, 2018; Member Finance & Audit Committee since 2021.



**BOARD APPOINTED DIRECTOR**

**Daniel Lalor MFIA**

CEO, NiftySlabs  
Appointed Director March 2021; FIA QLD Committee 2016, 2019 to present;  
Member Professional Development & Identity Committee since 2021.

## 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 AND AUDIT COMMITTEE

Chair: Benjamin Cox FFIA  
Jim Hungerford MFIA  
Joe Shannon MFIA (Hon)  
Lisa Allan FFIA  
Meredith Dwyer FFIA CFRE  
Alexandra Struthers

### MEMBERSHIP

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

### PROFESSIONAL EDUCATION AND IDENTITY

Chair: Daniel Lalor MFIA  
Michelle Folder MFIA  
Rebecca Miller FFIA  
Steffi Chang MFIA CFRE  
Belinda Dimovski MFIA

### RISK COMMITTEE

Chair: Benjamin Cox FFIA  
Meredith Dwyer FFIA CFRE  
Christine Anderson FFIA CFRE  
Alan White MFIA CFRE

### NOMINATIONS COMMITTEE

Chair: Meredith Dwyer FFIA CFRE  
Vicki Rasmussen FFIA CFRE  
Paul Flynn FFIA MAICD  
Nigel Harris AM FFIA CFRE  
Jo Garner FFIA CFRE  
Alan White MFIA CFRE

### FELLOWS NOMINATIONS COMMITTEE

Chair: Vicki Rasmussen FFIA CFRE  
Vicki James FFIA  
Rebecca Hazell FFIA CFRE  
Bianca Crocker FFIA CFRE  
Andrew Sabatino FFIA

### FIA FOUNDATION COMMITTEE

Chair: Vicki Rasmussen FFIA CFRE  
Tanya Hundloe FFIA CFRE  
Peter Dalton FFIA CFRE  
Christine Anderson FFIA CFRE GAICD

## **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 supporters and volunteers for their contribution to fundraising and the work of FIA.



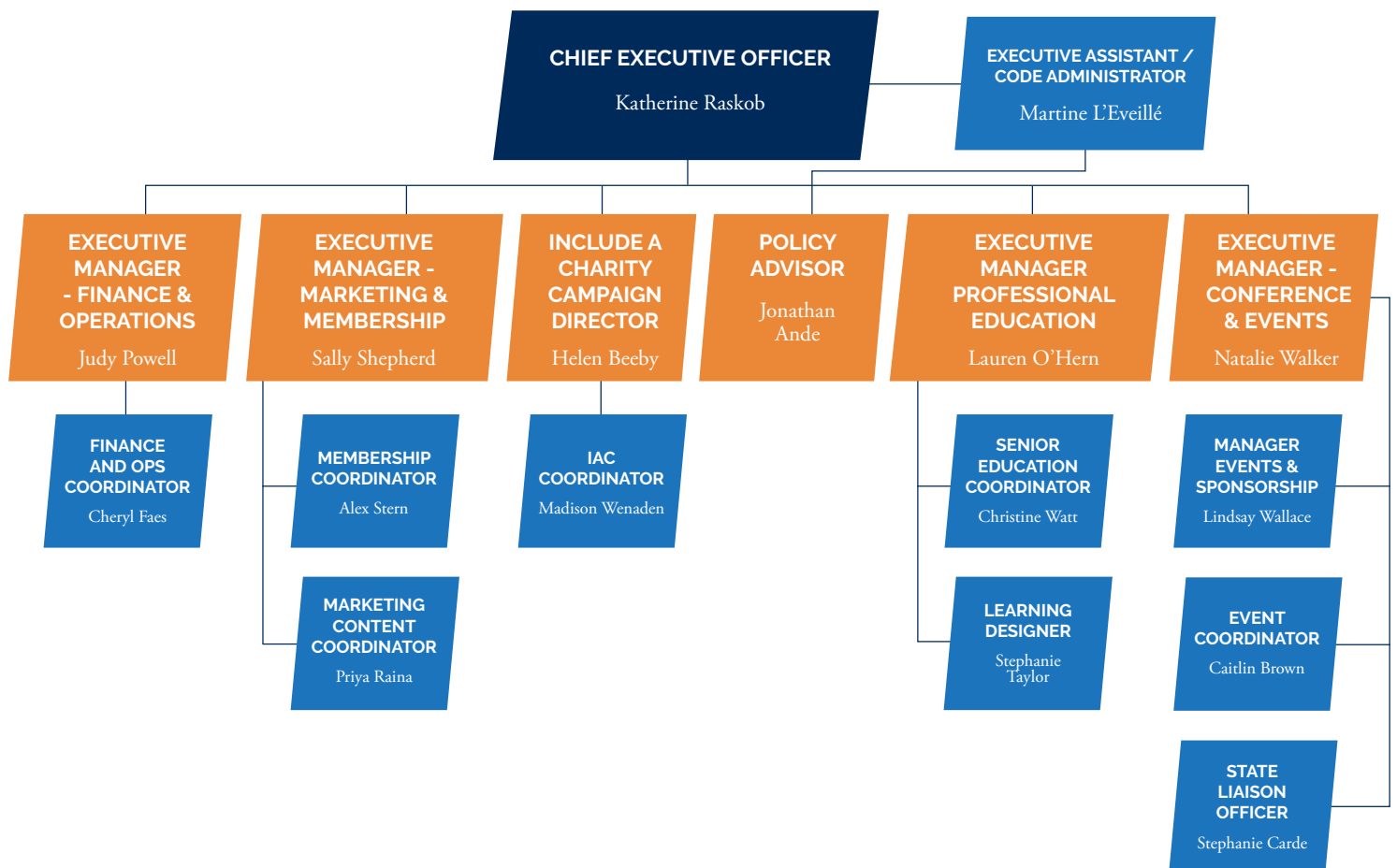
# Secretariat

The day-to-day operations of FIA are managed by a dedicated team.

## 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 2022

## STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME for the Year Ended 31 December 2022

		2022	2021
	Note	\$	\$
Revenue	2	3,751,848	3,194,900
Administration expenses		(164,792)	(123,682)
Conference, workshop and campaign expenses		(1,523,662)	(1,011,152)
Occupancy expenses		(174,286)	(174,168)
Employee benefits expense		(1,827,745)	(1,728,564)
Depreciation and amortisation	3	(8,538)	(7,124)
		<hr/>	<hr/>
		(3,699,023)	(3,044,690)
		<hr/>	<hr/>
<b>Net Surplus/(Deficit)</b>		<b>52,825</b>	<b>150,210</b>
		<hr/>	<hr/>

## STATEMENT OF FINANCIAL POSITION

as at 31 December 2022

	Note	2022 \$	2021 \$
<b>ASSETS</b>			
<b>Current Assets</b>			
Cash and cash equivalents	6	3,538,208	2,608,817
Receivables	7	291,437	296,900
Other assets	8	2,300	3,800
<b>Total current assets</b>		<b>3,831,945</b>	<b>2,909,517</b>
<b>Non-current assets</b>			
Software, plant and equipment	9	21,745	8,149
Rebrand and Development costs	17	-	-
Right to use assets	18	109,279	193,574
<b>Total non-current assets</b>		<b>131,024</b>	<b>201,723</b>
<b>TOTAL ASSETS</b>		<b>3,962,969</b>	<b>3,111,240</b>
<b>LIABILITIES</b>			
<b>Current liabilities</b>			
Payables	10	341,441	283,304
Provisions	12	51,922	44,397
Deferred income	11	2,228,422	1,420,709
Funds held on trust		82,002	53,747
Lease liabilities	18	56,727	123,330
<b>Total current liabilities</b>		<b>2,760,514</b>	<b>1,925,487</b>
<b>Non-current liabilities</b>			
Provisions	12	47,215	40,371
Lease liabilities	18	27,277	70,244
<b>Total non-current liabilities</b>		<b>74,492</b>	<b>110,615</b>
<b>TOTAL LIABILITIES</b>		<b>2,835,006</b>	<b>2,036,102</b>
<b>NET ASSETS</b>		<b>1,127,963</b>	<b>1,075,138</b>
<b>EQUITY</b>			
Accumulated funds		1,127,963	1,075,138
<b>TOTAL EQUITY</b>		<b>1,127,963</b>	<b>1,075,138</b>

## STATEMENT OF CHANGES IN EQUITY for the Year Ended 31 December 2022

2022	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2022	1,075,138	1,075,138
Surplus for the year	52,825	52,825
<b>Balance at 31 December 2022</b>	<b>1,127,963</b>	<b>1,127,963</b>

2021	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2021	924,928	924,928
Surplus for the year	150,210	150,210
<b>Balance at 31 December 2021</b>	<b>1,075,138</b>	<b>1,075,138</b>

## STATEMENT OF CASH FLOWS for the Year Ended 31 December 2022

	Note	2022	2021
		\$	\$
<b>Cash from operating activities:</b>			
Receipts from members and customers		4,117,656	3,490,538
Payments to suppliers and employees		(3,174,655)	(2,865,367)
Interest received		8,524	1,276
<b>Net cash provided by/ (used by) operating activities</b>	<b>14</b>	<b>951,525</b>	<b>626,447</b>
<b>Cash flow from investing activities:</b>			
Payment for non-current assets		(22,134)	(2,506)
<b>Net cash (used in)/provided by investing activities</b>		<b>(22,134)</b>	<b>(2,506)</b>
<b>Net increase/(decrease) in cash and cash equivalents held</b>		<b>929,391</b>	<b>623,941</b>
Cash and cash equivalents at beginning of financial year		2,608,817	1,984,876
<b>Cash and cash equivalents at end of financial year</b>	<b>6</b>	<b>3,538,208</b>	<b>2,608,817</b>

Level 6  
350 Kent Street  
SYDNEY NSW 2000

75 Lyons Road  
DRUMMOYNE NSW 2047

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

ABN 48 117 620 556

20 Grose Street  
North Parramatta NSW 2151


PO Box 2210  
North Parramatta NSW 1750

**Auditors Independence Declaration  
To the Fundraising Institute Australia**

In accordance with the requirements of section 60-40 of the *Australian Charities and Not-for-profits Commission Act 2012*, as lead auditor for the audit of Fundraising Institute Australia for the year ended 31 December 2022, I declare that, to the best of my knowledge and belief, there have been:

- a. No contraventions of the auditor independence requirements of the 60-40 of the *Australian Charities and Not-for-profits Commission Act 2012* in relation to the audit; and
- b. No contraventions of any applicable code of professional conduct in relation to the audit.


KS Black & Co  
Chartered Accountants



Scott Bennison  
Partner

Dated in Sydney on this *31st* day of *January* 2023

Phone 02 8839 3000  
Fax 02 8839 3055

 Liability limited by a  
scheme approved  
under Professional  
Standards Legislation

  
CHARTERED ACCOUNTANTS  
AUSTRALIA • NEW ZEALAND

Level 6  
350 Kent Street  
SYDNEY NSW 2000

75 Lyons Road  
DRUMMOYNE NSW 2047

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

ABN 48 117 620 556

20 Grose Street  
North Parramatta NSW 2151

PO Box 2210  
North Parramatta NSW 1750

## INDEPENDENT AUDITOR'S REPORT

To the members of Fundraising Institute Australia

### ***Report on the Audit of the Financial Report***

#### **Opinion**

We have audited the financial report of Fundraising Institute Australia, which comprises the statement of financial position as at 31 December 2022, the statement of profit or loss and other comprehensive income, statement of changes in equity and statement of cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies, and the responsible entities' declaration.

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

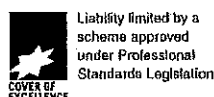
- (a) giving a true and fair view of the registered entity's financial position as at 31 December 2022 and of its financial performance for the year then ended; and
- (b) complying with Australian Accounting Standards and Division 60 of the *Australian Charities and Not-for-profits Commission Regulation 2013*.

#### ***Basis for Opinion***

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Report section of our report. We are independent of the registered entity in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 Code of Ethics for Professional Accountants (including Independence Standards) (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

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

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### ***Other Information***

The responsible entities are responsible for the other information. The other information comprises the information included in the registered entity's annual report for the year ended 31 December 2022, but does not include the financial report and our auditor's report thereon.

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

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

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

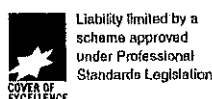
### ***Responsibilities of Responsible Entities for the Financial Report***

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

In preparing the financial report, responsible entities are responsible for assessing the registered entity'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 intends to liquidate the registered entity or to cease operations, or has no realistic alternative but to do so.

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

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### ***Auditor's Responsibilities 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 Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of the financial report.

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

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

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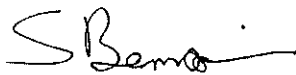
- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.

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

### ***Independence***

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

KS Black & Co  
Chartered Accountants



Scott Bennison

Partner

Dated: 31/1/2023

Sydney

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FIA

**Fundraising  
Institute  
Australia**

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The Professional Body for Australian Fundraising

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



*marlin*

**Prepared by Fundraising Institute Australia**

**31 December 2022**

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