



**FIA**

**Fundraising  
Institute  
Australia**

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The Professional Body for Australian Fundraising

# **Annual Report 2023**

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# About Fundraising Institute Australia

**Fundraising Institute Australia (FIA) is the national peak body representing professional fundraising in Australia.**

## VISION

FIA's vision is bigger impact for a better world through best-practice fundraising.

## MISSION

Our mission is to build a vibrant community of best-practice fundraisers and a culture of professional fundraising. We do this through education and training, support and advocacy, and the promotion and protection of the fundraising sector. The FIA Code is the self-regulatory scheme that guides the sector to professional best practice.

FIA's network of more than 200 volunteers across Australia helps to provide thoughtful and helpful engagement as well as expertise, advice, tools and resources for professional 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 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.



# State of the Sector

## The 2023 FIA Survey<sup>1</sup> gave a snapshot of the contemporary fundraising sector.

Three-quarters of respondents were female, urban-based, and aged between 35–65. Most have worked in the field for over five years, and 87% were employed in charities in specialised fundraising or managerial roles. Only 9% were CEOs or executive directors. Income raised by organisations was evenly spread, with the highest segment \$2 million–\$5 million.

2023 has been a challenging year with the cost-of-living crisis and increasing demands on the sector due to inflation, natural disasters and international conflicts. Recognising that the sector was under pressure, the federal government set an ambitious target to double philanthropic giving by 2030. In February, Assistant Charities Minister Andrew Leigh announced a Productivity Commission inquiry into philanthropy<sup>2</sup> to seek ways to boost donations. The Commission is consulting widely with governments, philanthropists, charities, corporates and the general public, holding public hearings and inviting submissions. Its final report will go to the government in 2024.

There was good news for fundraisers in February when the Commonwealth, state and territory treasurers agreed to harmonise fundraising laws<sup>3</sup> across Australia. After years of lobbying, FIA welcomed this news as nationally consistent fundraising regulations could save the sector more than \$1 million each month in compliance administration costs.

FIA was also pleased that a legislated code of conduct is not part of the fundraising harmonisation plan. We successfully argued that the FIA self-regulatory code is already the gold standard for best-practice fundraising. FIA's 2023 Survey<sup>4</sup> revealed that 57% of respondents felt the code helped them to practise ethical fundraising, and 44% said it was critical for their role and organisations. Only 9% thought the code made no difference to fundraising practice.

The Australian Charity and Not-for-profits Commission (ACNC) welcomed funding in the 2023–24 federal budget that will allow it to disclose information about registration and compliance decisions for educational purposes.<sup>5</sup> ACNC Commissioner Sue Woodward AM said the reforms would foster enhanced trust and confidence in the charity sector.

The latest official data from the ACNC<sup>6</sup> revealed Australia had nearly 60,000 registered charities. In the 2021 reporting period, the sector generated \$190 billion in revenue and employed 10.5% of the workforce, demonstrating its importance to the Australian economy and society. Donations increased by \$676 million to \$13.4 billion. Charities reported more than \$422 billion in assets, but expenses also increased in 2021. The report also confirmed a decline in volunteering, with 596,000 volunteers leaving the sector between 2018–21. This is sobering news for the 50% of charities that operate without paid staff.

More positively, the *Pro Bono Australia Salary Survey Report 2023*,<sup>7</sup> produced with NGO Recruitment and PwC, found that the charitable sector experienced a significant jump in remuneration, with respondents across multiple roles recording a lift in their pay. Health and medical research charities offered the highest salaries, followed by aged and community care service organisations. Managers responsible for hiring should note that “more competitive remuneration

<sup>1</sup> Fundraising Institute Australia, FIA Survey 2023

<sup>2</sup> Ministers Treasury Portfolio, media release, 11 February 2023

<sup>3</sup> Ministers Treasury Portfolio, media release, 16 February 2023

<sup>4</sup> Fundraising Institute Australia, FIA Survey 2023

<sup>5</sup> The Australian Charities and Not-for-Profits Commission, news, 11 May 2023

<sup>6</sup> The Australian Charities and Not-for-Profits Commission, Australian Charities Report 9th Edition, 22 June 2023

<sup>7</sup> Pro Bono Australia, Salary Survey Report 2023

offers” were why people were changing jobs. However, 41% of those surveyed said they were unlikely to leave their current roles in 2023, a sign the “Great Resignation” might be finished.

Encouragingly, giving remains constant in Australia, with 80% of Australians giving financially to charities, according to McCrindle Research’s *The Future Donor report*.<sup>8</sup> The study indicated that 90% of donors feel they should support charities. Pleasingly, the proportion of Australians who highly trust charities is 50% higher than the best-performing government category (local councils) and twice that of large corporations.

Dataro’s 2023 *Interim Fundraising Benchmark Report*<sup>9</sup> revealed that 56% of 151 global charities were experiencing year-on-year income growth in the first half of 2023. Income growth has trended upward since 2018, with two periods of exceptional generosity (the pandemic in 2020 and the war in Ukraine in 2022). Dataro predicted that giving would return to more normal patterns in 2023 after these unusual periods of disruption and generosity.

Similarly, Blackbaud’s survey of 260 non-profit professionals<sup>10</sup> found more organisations said their income had increased than declined, and over half had met their fundraising targets. Charities doing well with their fundraising tended to have more diversified income streams comprising major donors, grants, trusts/foundations, legacies and corporate giving. The organisations that had seen declines in income were not so diversified and more reliant on grants and events fundraising. The report also indicated that the digital maturity of charities was linked to income growth. However, the report also warned that most charities were not making the most out of their tech and CRM solutions.

Insights from the third annual *JBWere NAB Charitable Giving Index*<sup>11</sup> revealed that charitable giving by Australian households rose 10% in 2023, demonstrating a marked recovery in giving by Australians. However, around \$3 billion worth of donations had been lost over the past three years thanks to the pandemic and cost-of-living pressures. The silver lining has been the continued giving by wealthier households and corporates. According to the index, health, culture and arts charities received more donations after recovering from significant lows. Less money went to animal welfare and environmental charities, which had already attracted massive support during the 2019–20 bushfires.

Less positively, NAB’s quarterly *Consumer Sentiment Surveys*<sup>12</sup> showed Australians had reduced their charitable giving over the past year as consumer confidence waned. Australia also slipped down the global generosity scale in 2023. Since the Charities Aid Foundation began publishing the *CAF World Giving Index*<sup>13</sup> in 2010, Australia has ranked in the top 10 most generous countries. But in 2023, Australia dropped to 14th out of 142 countries in the index, which measures helping strangers, donating and volunteering. In 2023, 65% of Australians helped strangers, 56% donated money, and only 31% volunteered their time.

The latest Australian Tax Office statistics<sup>14</sup> analysed by the Australian Centre for Philanthropy and Nonprofit Studies revealed only 27% of the population made and claimed donations. It is the third year consecutively where less than 30% of taxpayers gave. Fortunately, while fewer people are donating, those who do are giving more. Tax-deductible donations reached \$4.39 billion in 2020–21 (up 14% from 2019–2020), and the average amount given increased by 18% from \$886 to \$1,047. New South Wales, Victoria and Western Australia accounted for 80% of all donations made and claimed.

8 McCrindle Research, *The Future Donor*

9 Dataro 2023 *Interim Fundraising Benchmark Report*

10 Blackbaud Asia Pacific, *The Status of ANZ Fundraising 2023 Benchmark Report*

11 JBWere NAB *Charitable Giving Index*, August 2023

12 NAB *Consumer Sentiment Surveys* (Quarters 1–3 2023)

13 Charities Aid Foundation, *CAF World Giving Index 2023*

14 Australian Centre for Philanthropy and Nonprofit Studies, QUT, *An examination of tax-deductible donations made by individual Australian taxpayers in 2020–21*

Meanwhile, Perpetual, one of Australia's largest managers of philanthropic trusts, discovered in their latest report<sup>15</sup> that charity staff were increasingly concerned about rising inflation, high staff turnover and cyber-security threats. Fundraising income has become unstable, and program delivery is more expensive, thanks to rising inflation. However, philanthropy, grants and community giving are helping charities to continue their vital work. Perpetual distributed \$185 million to the community in 2023.

Meanwhile, capacity issues and limited support for skills development and training were two reasons for high staff turnover in the sector. To address this concern, Perpetual partnered with FIA this year to provide scholarships for fundraisers with limited resources to undertake FIA's certificate and diploma programs.

In October, FIA and other peak bodies met with Department of Home Affairs officials to discuss cyber-safety support for the sector.<sup>16</sup> The catalyst for the meeting was the hack on a tele-fundraising agency that resulted in a serious data breach that impacted 70 charities and more than 50,000 supporters. The peak bodies have requested help from the government to protect charities from cyber-attacks in future. Some of Perpetual's philanthropists, recognising the value of small charities to the community, are also providing funding to help non-profit organisations invest in their internal systems.<sup>17</sup>

Last but not least, FIA continues to provide members with quality education, events and resources to help them navigate the latest challenges in the fundraising realm. In July, FIA reaffirmed its commitment to work alongside the Chartered Institute of Fundraising in the UK and the Association of Fundraising Professionals in the USA to advance professional fundraising around the world.

15 Perpetual 2023 Philanthropy Insights Report

16 Institute of Community Directors Australia, news, 9 October 2023

17 Perpetual 2023 Philanthropy Insights Report

# Chair's Report

**To our members, supporters and partners, I am pleased to present FIA's 2023 Annual Report.**

**Over the last year we have seen many challenges as fundraising professionals, however as we have shown time and time again, we always can succeed through extremely challenging times.**



It has been heartening to see that fundraisers who have sought innovation and embraced change, as well as remained focused on highly professional, best-practice fundraising have delivered renewed success for their organisation and mission.

In 2023, FIA maintained our position as the fundraising sector self-regulator and the key representative body for the \$13B charitable fundraising sector. Our work to strengthen how we represent, engage and advocate for you, our members has certainly increased. The relevance of our work and impact has been reflected in our membership growth. We have, once again seen an increase in members, rising again from 630 in 2022 to 770 in 2023, a 21% increase. At the same time, our member net promoter score rose dramatically, and our members and the broader community continue to value our strategy, focus and commitment to fundraising as critically important for the work they do each day.

In 2023, we continued to enhance our work in professional development and identity for fundraisers. Our focus and commitment allowed us to continue to invest in new ways to educate, train and engage with fundraisers. We built on our strategy to advance our professional education offer with investment in a new learning management platform, launched in the first quarter of 2023, and a suite of revised and refreshed core education courses to reflect modern fundraising practice.

Our engagement and close relationships with both Federal and state governments to shape change in the regulatory environment continued in 2023 with a significant body of work in submissions to governments on behalf of members on issues critical to the fundraising and broader charitable sector, many in collaboration with other peak organisations.

The self-regulatory FIA Code continues to be the cornerstone of FIA's work. The Code Authority's compliance program continued to provide members with critical information on how they can achieve ethical best-practice fundraising 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 continued at pace and achieved close to 9,000 total registrations by the fourth quarter of 2023 and continues at great pace including a noticeable increase in number of member organisations enrolling entire teams in the Course. It is these numbers that reflect how important and relevant ethics are in today's ever-changing world.

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. It was also delivered through support of 30+ volunteer judges who gave up their time to review submissions and debate their merits. The support and leadership of our sponsors and volunteers is something we are so very grateful for, thank you to you all.

Our state/territory committees delivered a significant amount and variety of both in-person and online events again this year including delivering record-breaking attendance at one-day events in South Australia and Western Australia. 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. It is you, our state committee volunteers who are helping to shape a sustainable future for FIA as we work to achieve our mission. Thank you for what you do for FIA, for Fundraising and for our sector.

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 2023, 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. Thank you to you, our volunteer leaders who give so much to the future of fundraising.

In 2023, the Board undertook a survey of its effectiveness. As a board we are committed to not only improving how we achieve our mission and strategy but improving how we govern FIA. This was the first time in FIA history that the board undertook a rigorous process of external benchmarking, review and surveying to understand how we can do more and do better as leaders of FIA's vision and mission. This process was very valuable to give us insight, focus and new direction on how we can serve FIA and our members now, and for decades ahead.

Financially, FIA remains very strong, growing a small surplus of \$92k from an expected break-even budget, and with a healthy balance sheet which puts the organisation in a very good position for future investments in innovation and growth. Given our renewed focus in 2023 to invest in our strategy and the people and systems to drive us there we are delighted to be in such a strong position.

Needless to say, it is people who continually deliver the success of FIA. In no small part this is done by our wonderful FIA CEO and her incredible staff who continue to deliver excellent service to members and represent so effectively the broader fundraising community. We are grateful to you for your hard work, leadership and commitment to advancing professional fundraising in Australia.

**Ben Cox FFIA**

**CHAIR**

**Fundraising Institute Australia**



# Chief Executive's Report

## I'm pleased to present the FIA 2023 Annual Report.

The year started on a high note with our annual national conference, held in February in Melbourne, achieving record breaking attendance of 1,200, a surprise given the previous year's conference was held late, in June – only eight months earlier.



It was an incredible event with a 'vibe' that was unparalleled and corresponding high satisfaction scores.

FIA continue to achieve increase in all types of membership including record numbers of organisations, now at 770 at end of 2023. Total members inclusive of organisational staff members has now reached over 8,302 up from 6,860 in 2022.

In May we held our fifth annual FIA Essential Member Update to provide members with key updates on the sector and the work of FIA. As in 2022, we held the event via Zoom for the entire country and covered key areas of FIA membership as well as trends and issues in the fundraising sector. It included an interesting panel session on 'the questions we're not asking in fundraising' which was incredibly well received.

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 close to 9,000 Code course registrations 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 the Privacy Act, the Productivity Commission and the Blueprint.

Our professional education program improved dramatically with the launch of a new learning management platform, We delivered 45 courses with 314 hours of education and training along with a national mentoring program which achieved the highest take up rates yet – 212 participants, up from 182 participants in 2022. The national mentoring program remains very popular, attracting 78 pairs (mentors and mentees).

Our work in diversity, equity and inclusion (DEI) continued in 2023 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 and other events to ensure increased diversity and inclusion. We also launched a new Safeguarding Policy to ensure the safety and security of all attendees at FIA events.

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 two very large and successful events – a now annual one day gifts in Wills conference, held online in July, and Include a Charity Week in September with international presenters from the UK providing insight and expertise to members across the country. 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 2023 budget late in 2022, we put forward a budget of break even and through both our program success and tight financial management, were able to achieve a surplus of \$92k.

I am grateful to FIA Board Chair Ben Cox FFIA 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) and Precision Fundraising as well as so many other – more than 100 – organisations who support our work. I also thank the hundreds of FIA volunteers – State/Territory Committee Chairs and members, Conference and Awards Committees, IAC Advisory Committee, 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 challenging times.

Finally, my thanks to the FIA team. 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 to present the Financial Report for the year ended 31 December 2023 as audited by K S Black & Co.



## SUMMARY OF THE FINANCIAL RESULTS

The budget for 2023 was set with breakeven expectations and this has been exceeded due to several factors. FIA had a tremendous start to the year with the largest conference in our history followed by a successful launch of the membership renewal campaign in mid-May. The membership renewal process was transformed in 2023 by automating invoices to members for payment by secure link or via bank transfer. We are grateful to all our FIA members who continue to show an incredible commitment to their professional association.

Despite holding our annual conference eight months from the previous one, once again we have exceeded all expectations, holding the largest conference in FIA history. 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 who had not had the opportunity to meet personally for a few years to catch up again.

By end of 2023, almost 9,000 people had registered for and/or taken the FIA Code training, and this has resulted in a significant increase in Organisation membership from growing awareness of the value of the Code and staff training. Organisation membership has increased by 21% this year with signs of continuing growth.

These factors combined with a continuing tight control on expenditure enabled FIA to achieve a surplus of \$92k for the year.

## OPERATING ENVIRONMENT

The Board approved a breakeven budget in order to maintain high service levels and continued investments in technology. The outstanding results of conference and membership and continued support and uptake of all FIA services have provided sufficient income for the Board to agree to further investment in Salesforce Experience Cloud, due to go live in March 2024.

FIA staff are to be commended for managing the technology upgrades while continuing their focus on our ongoing programs. With thanks to our tutors, presenters, committee members and speakers who continue to go above and beyond to provide professional education and assistance to our members, we have seen increases in attendances; in 2023, over 11,500 people attended our programs, a massive increase of 21% on last year.

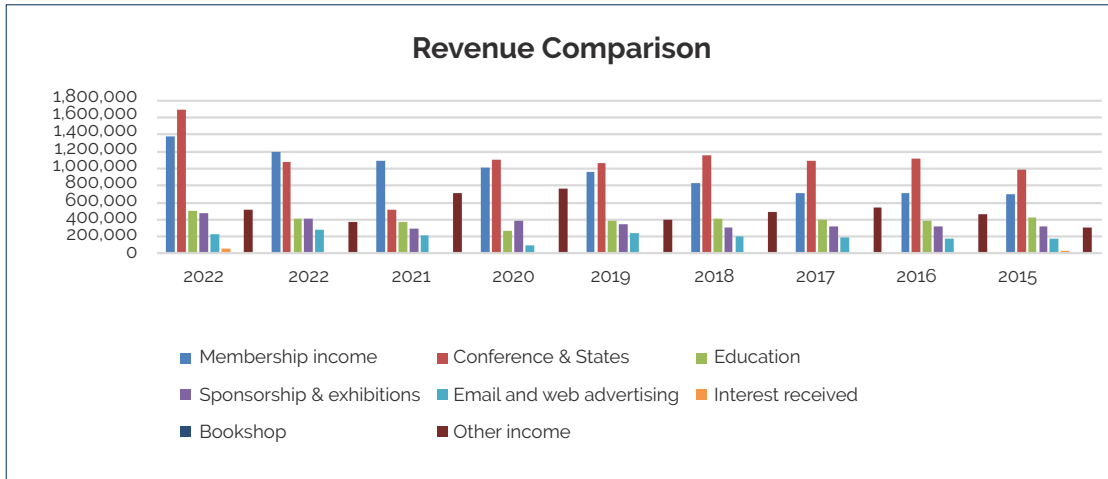
The fundraising sector continues to see the value of the Code as a baseline expectation for fundraising excellence for the sector. By 2023, we have seen close to 9,000 registrants for Code training, an increase of 32% on last year. Charities and suppliers to the sector are increasingly now booking groups 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 previously restructured the membership categories and this year, total membership numbers are 8,302, an increase of 15.6% on last year.

## INCOME

Income for the year was \$4.8M, an increase of \$1.09M on 2022 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.

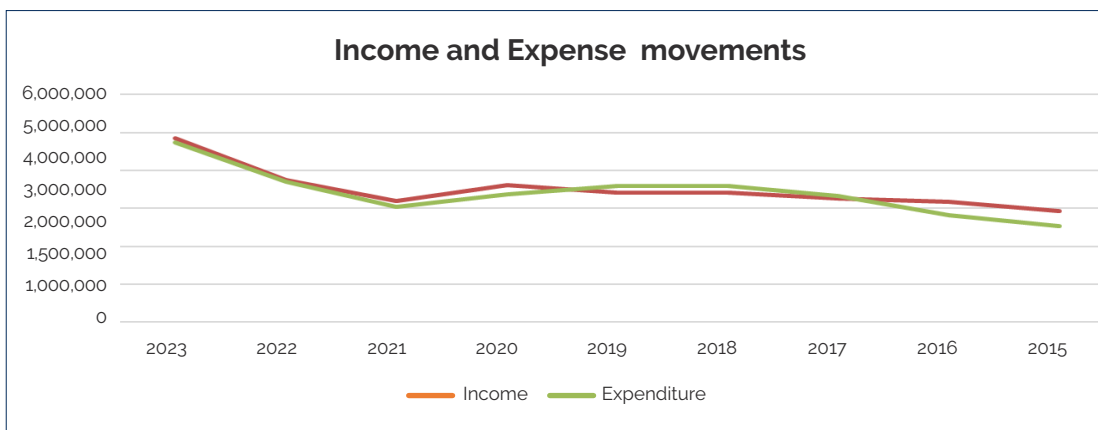
The chart below shows the income contribution from each revenue stream highlighting the weight of each key area of the business.



## EXPENSES

Total expenses for the year were \$4.75M, representing the investments made in the learning management system and educational products, upgrade to Salesforce and the additional costs incurred in holding a much larger face to face conference than expected. We also continued to focus on reducing costs across all functions where possible.

The chart below shows the movement of total income and expenses from 2015 to 2023.



## OUR FINANCIAL POSITION

The surplus of \$92k achieved this year will build reserves to \$1.22M which provides FIA with the ability to continue to invest in upgrading our online platforms and make investments in staffing to grow the FIA Foundation. While the 2023 budget was cast in the expectation of breakeven, the turnaround achieved by the success of our programs has enabled a net cash inflow of \$261k for the year, increasing our cash position to \$3.8M at year end. This is sufficient to meet commitments and future needs.

## FINANCE AND AUDIT COMMITTEE

In 2022, the FIA Board agreed to the establishment of a Risk Committee, separate to the Finance and Audit Committee, in order to more fully focus on the development of a Risk Matrix and policy revisions and developments for FIA, as well as to enable closer scrutiny of emerging and escalated risks. The major development work of the Risk Framework/Matrix and Reviews having now been completed, it was fitting that the Risk Committee rejoin the Finance and Audit Committee, ensuring adequate time for scheduled reviews and any oversight of emerging issues. The Finance and Audit and the Risk committees were merged in August 2023.

I would like to thank my fellow committee colleagues for their support, guidance and dedication to FIA:

- Ben Cox FFIA
- Jim Hungerford FFIA
- Joe Shannon B. Comm MFIA (Hon)
- 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 2023.

**Christine Anderson FFIA CFRE GAICD**

**HONORARY TREASURER**

# About the FIA Code

**The FIA Code is a voluntary, self-regulatory code of conduct for charitable fundraising in Australia. The Code does not replace or override any law but aims to raise standards of ethical conduct across the charitable fundraising 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 takes an active role in overseeing the fundraising activities of FIA members. It aims for swift and fair resolution of Code complaints and appeals while also fostering awareness of the Code through training initiatives. Additionally, it provides suggestions to the FIA Board for enhancing self-regulation within the sector.

The Authority is independently chaired by former NSW Liberal leader Peter Debnam; members in 2023 are Ashley Rose FFIA, CEO of Mondial Fundraising Communications, Karen Shields, Director-Individual Giving, Great Barrier Reef Foundation, Nerida Wallace MFIA, Principal of Transformation Management Services, Shanthini Naidoo FFIA CFRE, CEO at St Vincent's Curran Foundation and Allan Godfrey FFIA, Chief Marketing Officer at Royal Life Saving Society WA. 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 conduct 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.

## A MESSAGE FROM THE CHAIR

### PETER DEBNAM

As the Chair of the FIA Code Authority tasked with overseeing the implementation of FIA's self-regulatory code, I strongly believe the activities of the Code Authority have been integral in ensuring trust and confidence in the charitable fundraising sector is sustained. Operating in a collaborative and considered manner, the Code Authority has worked together to manage the prevailing issues arising from the fundraising practices and conduct of FIA members.

I am pleased to state that, in 2023, the majority of fundraising interactions we monitored adhered to the high standards outlined in the FIA Code. Instances of non-compliance were infrequent, and in most such cases, they were predominantly attributed to inadequate administrative capacity of member organisations.

In 2023, we further demonstrated the instrumental role we play in shaping and elevating fundraising standards with our mystery shopping, audit program, and the development of training, guidance and resources for members.

As we look to the years ahead, we remain committed to ensuring that all FIA members adhere to high standards of fundraising practices, aligning with our goal to uphold the integrity of the charitable fundraising sector.

## 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 the complaint 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 20 complaints against FIA members were recorded and resolved in 2023. This compares to 12 in the previous year. There were also four complaints recorded against non-FIA members in 2023, all of which were resolved.

## CODE COMPLIANCE MONITORING

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.

In 2023, compliance with the FIA Code was robust, with most fundraising interactions achieving compliance with the Code. Out of 4,856 interactions monitored, only 29 issues were identified, resulting in an impressively low non-compliance rate of 0.5%. Instances of non-compliance were primarily attributed to administrative challenges, particularly in effectively implementing opt-out requests. This issue extended across the range of FIA members from organisational members with large programs to those with smaller programs. This trend underscores a sector-wide challenge related to administrative capacity and the level of sophistication needed to properly manage donor opt-out requests. It is also important to consider this in the broader context of charities facing pressure to delete data as a preventive measure against data security threats. However, there is a delicate balance required in navigating data deletion, as it introduces the risk of unintentionally

erasing data related to opt-out requests. The sector faces challenges in meeting these dual requirements and aligning with the expectations of regulators and the public.

Importantly however, the FIA Code Authority's feedback to member organisations on their mystery shopping performance significantly advanced best practice and higher standards of conduct in charitable fundraising. Across all mystery shopping areas, the FIA Code Authority provided feedback to member organisations that were included in every mystery shopping round. This feedback took various forms including:

- i) Seeking clarification from member organisations on fundraising practices inconsistent with the FIA code.
- ii) Requesting member organisations to explain reasons for fundraising conduct inconsistent with the FIA code.
- iii) Requesting member organisations to outline actions they are implementing to rectify non-compliant fundraising conduct.
- iv) Specifying actions for member organisations to implement for robust FIA Code compliance.
- v) Cautioning members of their inclusion in further mystery shopping to observe those improvements.
- vi) Commending and approving conduct that is FIA code compliant.

In every instance, member organisations responded by articulating the measures they are undertaking to rectify the conduct or practice. These measures usually encompass further staff training, enhancements to systems, improved management of relationships with third-party suppliers, reiterating their need for greater awareness of responsibilities under the FIA Code, and other actions aligned with achieving effective Code compliance and ethical fundraising.

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**Total number of members included in mystery shopping this year, and since 2019**

<b>110</b>	<b>798</b>	<b>398</b>
<b>New members added to monitoring in 2023</b>	<b>All members included since 2019</b>	<b>Members currently actively monitored</b>

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**Number of interactions this year, and since 2019**

<b>5,901</b>	<b>17,517</b>
<b>2023 interactions</b>	<b>Interactions since 2019</b>

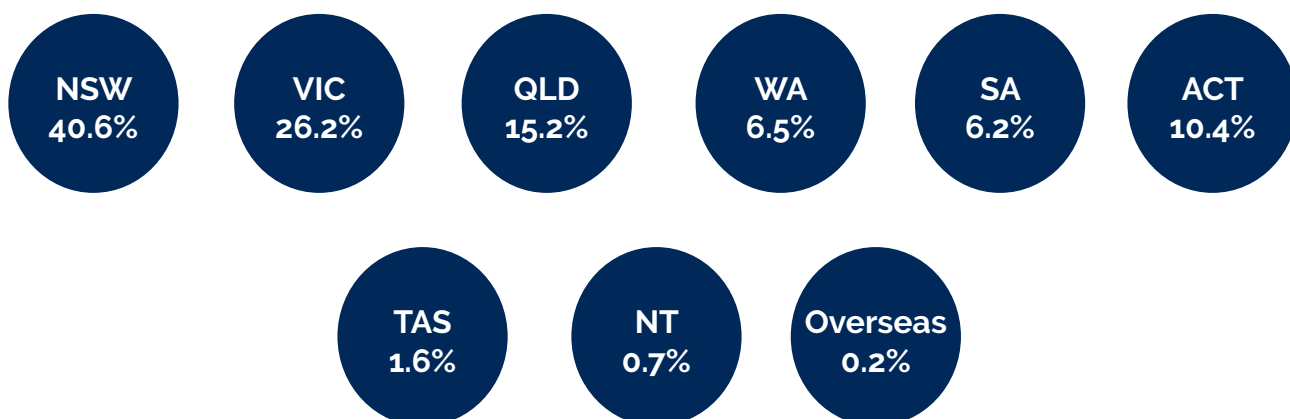


# MONITORING

## Contact type: 2019 - 2023



## Member organisations monitored by State: 2019 - 2023



Code Clause	Total	2019	2020	2021	2022	2023
2.1	2	1	1	0	0	0
3.3	1	0	1	0	0	0
4.1a	7	1	0	0	2	4
4.1b	31	4	5	6	1	15
4.3c	4	2	2	0	0	0
4.7a	65	15	8	22	16	4
4.11a	3	2	0	0	1	0
4.11b	3	0	0	0	3	0
SMS 3.1, 3.2	5	0	0	0	1	4
Phone 4.1a	1	0	0	0	0	1
Phone 3.1f	1	0	1	0	0	0
Phone 4.1j	1	0	0	0	0	1
Total Code breaches found	124	25	18	28	24	29

## AREAS OF MONITORING IN 2023

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### Ongoing monitoring

Social Media  
fundraising

Email  
fundraising

SMS  
fundraising

Direct mail  
fundraising

Telephone  
fundraising

Lottery  
fundraising

Newsletters

Donor surveys

---

### Specific monitoring to date

Opt out  
requests

Vulnerable donor  
communications

Natural disaster  
appeal fundraising

Matched giving  
appeals

Virtual gift  
appeals

---

## KEY AREAS OF IMPROVEMENT IN 2023

- SMS fundraising compliance – adding “STOP” element to messages has improved
- Reduction in claims of “100% goes to the cause” in fundraising appeals
- Reduction in issues with failing to disclose sources of data from swaps and co-ops
- Reduction in number of telephone fundraising issues relating to over-persistent callers / too many asks in calls
- Inclusion of privacy statements in nearly all fundraising communications (although note below regarding surveys)

## KEY AREAS FOR CONTINUED MONITORING IN 2024

- Better implementation of opt-out and donation cancellation requests, not due to intentional disregard, but requests largely due to database hygiene and administrative issues in recording and managing requests
- Improved recognition and handling of donors in vulnerable circumstances
- Greater transparency in matched donations promotions
- Donor surveys - including privacy statements around the capture and use of personal information in donor surveys

## CODE TRAINING

By the end of 2023 9,000 people had registered for and/or taken the FIA Code Training. The FIA Code Course provides fundraisers with an understanding and awareness of each section of the Code assisting them to meet their FIA membership obligations. The course provides a solid understanding of how to conduct fundraising within an ethical framework and promote a culture of responsible fundraising practice. Any member who has the term ‘fundraiser’ in their job description or who is

involved in fundraising on behalf of a charity or non-profit organisation is obligated to undertake the training. This applies to individuals at all levels of an organisation, and suppliers who engage in fundraising activities on behalf of FIA members. Undertaking the FIA Code Course is mandatory for all FIA members, the Code Authority continually urges all FIA members to complete the course to minimise the risk of breaching the Code.

## CODE AUTHORITY MEETINGS IN 2023

Throughout 2023, the Code Authority convened on seven occasions, which included three extraordinary meetings. Quarterly meetings featured a report from the Code Monitor and updates from the FIA CEO, Policy Advisor and Code Administrator. The regular meeting agenda also included discussions on FIA Code training, communications, and initiatives to enhance awareness of the FIA Code.

Following each meeting, a 'Code Update' was routinely sent to FIA members, summarising compliance outcomes and other pertinent matters. The Code Authority also handled a diverse range of complaints lodged by both the public and individuals, irrespective of their FIA membership status (further details on the following page). In response to the monitoring reports, the Code Authority offered guidance to FIA regarding connecting with members based 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.

As part of the purpose to establish and promote high standards of fundraising ethics and practices, the Code Authority presided over the introduction of a new matched giving practice note. The Matched Giving Practice Note was developed to provide guidance for FIA Members in applying best practice and maintaining transparency when conducting matched giving fundraising campaigns. The Practice Note was endorsed by the Code Authority in December 2023.

## 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 2023, Ashley Rose FFIA had completed his term with thanks from the Code Authority and FIA for his service. Two Code Authority members were reappointed for a second term, Shanthini Naidoo FFIA CFRE and Nerida Wallace MFIA.

Position	Name	Appointed	Status	Term Number	Term Completes on
Chair	Peter Debnam	1 Feb 21	Current	2	Feb 25
Board appointed Member	Ashley Rose FFIA	30 Nov 19	Current	2	Nov 23
Board appointed Member	Karen Shields	17 June 20	Current	2	June 24
Board appointed Member	Nerida Wallace MFIA	1 Jan 22	Current	2	Feb 26
Board Representative	Shanthini Naidoo FFIA CFRE	1 July 21	Current	2	July 25
Board Representative	Allan Godfrey FFIA	25 May 23	Current	1	July 25

# Policy and Regulatory Affairs

## POLICY AND REGULATORY ENGAGEMENTS

In 2023, FIA continued to represent the interests of Members through advocacy to government at all levels, as well as to stakeholders and the broader community. FIA submissions in 2023 covered the following areas:

- The Productivity Commission's philanthropy inquiry
- The Privacy Act Review Report
- Modernising postal services
- The Western Australian Gaming and Wagering Commission Professional Fundraisers Fees for Lotteries Review
- Tasmania's Charitable Fundraising Reform
- Developing a Not-for-Profit sector blueprint
- Australia Post charity mail incentive

FIA also consulted with several government agencies and private sector stakeholders including the Commonwealth Treasury, NSW Fair Trading, NSW Shadow Minister for Fair Trading, the ACNC, Australia Post, Infoxchange, and the Department of Infrastructure, Transport, Regional Development, Communications and the Arts among others. We stayed close to the Assistant Minister for Charities, The Hon Dr Andrew Leigh MP and his team, in matters critical to the fundraising sector.

## WESTERN AUSTRALIAN GAMING AND WAGERING COMMISSION PROFESSIONAL FUNDRAISERS FEES FOR LOTTERIES REVIEW

FIA's engagement with the Western Australia Gaming and Wagering Commission (WA GWC) in 2023 was a notable win for members and the sector. In January 2023, FIA was notified by the WA GWC that it had reached a view that it could no longer reasonably satisfy itself in respect of sections 51(b) and 104(1)(a) of the GWC Act, for the grant of a standard lottery permit, if more than 20% of ticket sales are spent on goods or services (not including prizes) from any private or commercial provider.

FIA and other partners opposed this proposed policy change arguing that it will be a major hindrance to lottery activities in Western Australia and a significant deterrent to fundraising for charities. In July, we received correspondence from the WA GWC that the requirement will now be a minimum of 30% return to the charity. This marks a far more contemporary and reasonable approach, and a notable success for our advocacy work on behalf members.

# Membership

FIA Membership is a commitment to best-practice fundraising. FIA supports members to fulfil their mission by:

- Developing and maintaining a self-regulatory regime in the FIA Code and consulting with government, stakeholders, and the community to set best-practice standards and advance professional fundraising
- Advocating on critical issues including reduction in red tape for the entire sector
- Providing professional development to increase capacity and capability and improve fundraising outcomes
- Developing a variety of comprehensive resources to support professional fundraising and Code adherence
- Hosting events, webinars, forums and conferences for the sharing of knowledge and skills

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

## MEMBERSHIP GROWTH

The number of organisational members has increased substantially. As at 31 December, FIA had 770 organisational members compared with 644 the previous year.

The number of supplier members has also increased. FIA's annual survey reaffirmed the desire on the part of the charitable sector to work with suppliers who are Code compliant. In addition, commercial organisations are realising the advantages of aligning with the FIA brand, the power of its reach in the sector and the opportunities it provides to connect and promote its supplier members.

The total number of professional members has also increased from 642 the previous year to 684 as at 31 December 2023.

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.

Growth can also be contributed to the frequency and quality of membership engagement from the positive experiences at events, professional development and member webinars and forums.

## 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 2023

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	Jim Hungerford FFIA
Kristine Ash FFIA	Jannine Jackson FFIA CFRE
Kel Beckett FFIA	Vicki James FFIA
Chris Benaud FFIA CFRE	Katherine John FFIA
Dyls Bertelsen FFIA	Diane Kargas Bray AM FFIA
Jock Beveridge FFIA	Zoe Karkas FFIA
Marcus Blease FFIA	Matthew Lang FFIA CFRE
Francesca Cinelli FFIA CFRE	Maisa Lopes Gomes FFIA
Leigh Cleave FFIA CFRE	Clare MacAdam FFIA CFRE
Gavin Coopey FFIA	Stephen Mally FFIA CFRE
Benjamin Cox FFIA	Andrew Markwell FFIA CFRE
Bianca Crocker FFIA CFRE	Jeremy Maxwell FFIA CFRE
Peter Dalton FFIA CFRE	Tracy McNamara FFIA
Leanne Dib FFIA	Fi McPhee FFIA
Jennifer Doubell FFIA CFRE	Helen Merrick FFIA
Meredith Dwyer FFIA CFRE	Rebecca Miller FFIA
Jackie Evans FFIA CFRE	Trudi Mitchell FFIA
Ron Fairchild FFIA CFRE	Lyn Moorfoot FFIA
Paul Flynn FFIA	Cara Morrison FFIA CFRE
Karen Gair FFIA MAHP; CFRE	Anthea Mur FFIA
James Garland FFIA CFRE	Shanthini Naidoo FFIA CFRE
Jo Garner FFIA CFRE	Nicola Norris FFIA
Dan Geaves FFIA	Ginta Orchard FFIA
Paige Gibbs FFIA	David Osborne FFIA CFRE
Allan Godfrey FFIA	Martin Paul FFIA
Craige Gravestain FFIA CFRE	Heiko Plange-Korndoerfer FFIA CFRE
Nigel Harris FFIA CFRE	Mark Quigley FFIA
Rebecca Hazell FFIA CFRE	Vicki Rasmussen FFIA CFRE
Maurice Henderson FFIA FAHP; CFRE	Christine Roberts FFIA

Ashley Rose FFIA  
Andrew Sabatino FFIA  
Charlotte Sangster FFIA CFRE  
Wendy Scaife FFIA  
Margaret Scott FFIA CFRE  
Cherie Smith FFIA CFRE  
Bec Stott FFIA  
Paul Tavatgis FFIA  
Karl Tischler FFIA  
Damian John Topp FFIA

Jakki Travers FFIA  
Sean Triner FFIA  
Alicia Watson OAM FFIA CFRE  
Kerin Welford FFIA CFRE  
Ruth Wicks FFIA  
Nola Wilmot FFIA  
Roewen Wishart FFIA CFRE  
Carl Young FFIA CFRE  
Savas Zacharias FFIA  
David Zerman FFIA

## EMERITUS MEMBERS AS AT 31 DECEMBER 2023

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)	Margaret Haydon FFIA (Emeritus)
Graeme Bradshaw FFIA (Emeritus) CFRE	Bruce Macdonald MFIA (Emeritus)
Gail Breen FFIA (Emeritus)	Jenny Marchionni MFIA (Emeritus)
Lyn Buckley FFIA (Emeritus)	Lindsay May 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 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)	Rosemary Wilcox FFIA (Emeritus)
Anne Gribbin FFIA (Emeritus) CFRE	Ann Wood FFIA (Emeritus)
Russell Harris FFIA (Emeritus)	Bruno Yvanovich FFIA (Emeritus)
Kenneth Harrison FFIA (Emeritus)	

## HONORARY MEMBERS AS AT 31 DECEMBER 2023

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

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

# Professional Education

## FORMAL EDUCATION PROGRAM

As the leading provider of 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 helps 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 their careers. FIA is also a partner organisation with CFRE International, and all our courses offer CFRE CE points towards Certified Fund Raising Executive certification.

A total of 343 hours of tutor-facilitated fundraising education was delivered in 2023 across 48 online and in-person courses to 1,011 participants across Australia and New Zealand, increasing from 634 in 2022. This demonstrates FIA's extensive reach and significance as a training institute in addition to fulfilling sector training needs.

Fundraising Essentials ran in-person in July in Brisbane, Sydney and Melbourne and again in November in Sydney and Melbourne. In 2023, the Certificate in Professional Fundraising was facilitated via Zoom in May-June and July and October-November (to be completed in February 2024), allowing for fundraisers from across the country to participate in an online classroom environment. A 'Fundraising for Boards' in-house training was also delivered in-person to ISAQ Bicentennial Foundation in August, who subsequently became an FIA member.

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. 135 learners successfully completed FIA's Core Education in 2023.

FIA thanks all of the tutors and facilitators who contributed to the 2023 Professional Education Program.

## CORE EDUCATION

These tutors provide instruction 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**  
Fundraising Consultant and Director, Margaret Scott & Associates  
Course: Diploma in Professional Fundraising
- **Jena Ellis**  
Philanthropy Lead  
Course: Diploma in Professional Fundraising



- **Maisa Lopes Gomes EMFIA**  
Head of Digital Fundraising, Cerebral Palsy Alliance  
Courses: Diploma in Professional Fundraising; Certificate in Professional Fundraising
- **Heiko Plange-Korndorfer FFIA CFRE**  
Chief Development Officer, Youth Focus  
Course: Certificate in Professional Fundraising
- **Ellaine Hislop MFIA CFRE**  
Manager Fundraising & Sponsorship, Perth Zoo  
Course: Certificate in Professional Fundraising
- **Francesca Cinelli FFIA CFRE**  
Fundraising Director, Mary MacKillop Today  
Course: Fundraising Essentials
- **Carl Young FFIA CFRE**  
Philanthropy and Fundraising Director  
Course: Fundraising Essentials
- **Rochelle Nolan MFIA**  
Individual Giving Manager, Breast Cancer Trials  
Course: Fundraising Essentials
- **Alan White MFIA CFRE**  
Deputy CEO, Plan International  
Course: Fundraising Essentials

## SHORT COURSES & WORKSHOPS

- **Ellaine Hislop MFIA CFRE**  
Manager Fundraising & Sponsorship, Perth Zoo  
Course: Managing Vulnerability
- **Natalie Khoo**  
Founder & CEO, Avion Agency  
Course: Copywriting Essentials
- **Dan Geaves FFIA & Jasmine Coronado**  
Marlin Communications  
Course: Finding & Keeping Regular Givers
- **Alexandra Cordukes & Will Cordukes**  
Directors, Laundry Lane  
Courses: Sensitive Storytelling; Animation for NFPs
- **Leigh Cleave FFIA CFRE**  
Director, Cleave Consults  
Course: Major Giving – developing the people and the program
- **Jonathan Dawson**  
Managing Director, Digital Ninjas  
Course: Accelerate Your Digital Fundraising Results
- **Heiko Plange-Korndorfer FFIA CFRE**  
Chief Development Officer, Youth Focus  
Courses: Managing Vulnerability, Navigating the Fundraising Regulatory Environment

- **Kate Parsons**  
Development Manager (Law & Justice), UNSW  
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**  
CEO, Data Designs Consulting  
Course: Building Data Frameworks for Fundraising Success; 7 Habits of Data Management for Compliance
- **Dr Cassandra Chapman**  
Associate Professor, University of Queensland  
Course: Donor Psychology: Evidence-based insights to improve your fundraising
- **Martin Paul FFIA**  
Director, More Strategic  
Course: Strategic Planning for Fundraising
- **Ruth Wicks MFIA**  
Director, More Strategic  
Course: Mid-Value Donors
- **Gavin Coopey FFIA**  
Director, More Insight  
Course: Fundraising InnovAction
- **Maisa Lopes Gomes MFIA**  
Head of Digital Fundraising, Cerebral Palsy Alliance  
Course: Digital Fundraising for Donor Retention
- **Hailey Cavill-Jaspers & Georgia McIntosh**  
Founders, BePartnerReady  
Course: Corporate Partnerships Panel Webinar; Brand Valuation; Identifying Corporate Suspects
- **John Greenhoe CFRE**  
Principal, The Confident Fundraiser  
Course: Master the Art of the Discovery Call; Creating a Compelling Case for Support
- **Goldia Shum**  
Customer Success Manager, Dataro  
Course: Data-Driven Fundraising to Increase Impact

## 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 2023-2024 Mentoring Program has benefitted from its inaugural sponsor, Clarety, which, as an exclusive sponsor provided \$10,000 in untied sponsorship. Funds have been used to engage external

expertise to support and add depth to the workshop program as well as to provided some additional support resources via the FIA Learning Hub to participants.

This year's program began in early September, with 141 mentor-mentee partnerships, which was an increase of approximately 58% compared to 2022-2023, demonstrating the ongoing desire for professional and career development amongst our membership. With applications still being managed manually, which places a significant administrative burden on the Professional Education team, for 2024-2025 the possibility of a matching tool is being explored, potentially through sponsorship.

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

- **Jeromine Alpe MFIA**  
Corporate Diversity Pathways
- **Paula Cowan and Mark Jones**  
Impact Institute

## SCHOLARSHIPS

Contributing to the development of its membership, FIA offered three scholarships in 2023.

### 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. 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 was funded for three years to one early career fundraiser to undertake FIA's Copywriting Essentials course online. This year, the scholarship's third year, the recipient was Anita Marchesani, Philanthropy Assistant, Anglicare WA.

### 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 2023 scholarship recipient was Gabi Veal, Philanthropy Campaign Coordinator, Centre for Eye Research Australia.

### BMS SCHOLARSHIP

The BMS Scholarship is provided to support the continuing professional development of the future leaders of fundraising. It enables one fundraiser each year to undertake the FIA Diploma in Professional Fundraising. This scholarship is open to current individual members or staff of organisational members of FIA who have a minimum of three years' experience in professional fundraising.

The 2023 scholarship was awarded to Nico Confalonerie-Smith MFIA, Fundraising Insights Lead, Australian Conservation Foundation.

## PERPETUAL FIA SCHOLARSHIPS

Perpetual Ltd provided funding of \$32,000 in June 2023 to enable eight scholarships for the FIA Diploma and Certificate to enable greater capacity building in the fundraising sector. Two FIA memberships were also funded by Perpetual to successful non-member applicants.

After joint promotions with Perpetual, 81 Certificate applications and 52 Diploma applications were received from across Australia. Assessments panels were established with both FIA and Perpetual representation after an internal shortlisting process to award the eight scholarships.

The 2023 Perpetual FIA Scholarship recipients are:

### **Certificate in Professional Fundraising**

Claudia Hundloe, Philanthropy & Engagement Coordinator, Uniting WA

Imogen Hielscher, Senior Fundraising & Communications Coordinator, LifeFlight Foundation

Isabella Neal-Shaw MFIA, Development & Partnerships Coordinator, Cambodian Children's Fund

Samuel Diotavelli, Philanthropy Executive, Adelaide Festival Centre

### **Diploma in Professional Fundraising**

Glen Norris, Philanthropy Lead, Karrkad Kanjdji Trust

Georgina Harvey, Fundraising & Events Manager, Youth Focus

Rebecca Stalenberg, Gifts in Wills Manager, MS Plus

Larissa Reinboth MFIA, Fundraising Manager, Possum Portraits

Isabella Neal-Shaw and Larissa Reinboth received FIA professional memberships as part of their scholarship.

## 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.

In 2023, 14 FIA members gained their CFRE.

### **STUDY SESSIONS**

Supporting members embarking on their CFRE credential, FIA offered 18 hours of pro bono CFRE exam preparation throughout the year, aligned with the exam testing windows. 12 members participated in study sessions this year.

FIA would like to acknowledge and thank Leo Orland EFFIA CFRE for his time, dedication, contributions and service to the CFRE study sessions in 2023.

## LEARNING MANAGEMENT SYSTEM (LMS)

In 2023, the Professional Education team undertook a staged implementation of Totara, branded as the FIA Learning Hub. The transition to a new, more powerful and integrated system also facilitated a range of course reviews and updates for FIA's Core Education, in particular Gifts in Wills Essentials and the Diploma in Professional Fundraising, which were re-created by FIA's Learning Designer in consultation with Subject Matter Experts.

The FIA Learning Hub has member data integration with Salesforce, currently only a one-way data exchange, with a two-way data exchange possible in the future.

A staged implementation of courses going live in the Learning Hub took place from January to May 2023, with the legacy system, Go1, ceasing operations on 17 May 2023, which allowed planned teach-outs so that no existing students would be disadvantaged by the system transition.

The FIA Learning Hub's e-Commerce went live in November 2023, in time for 2024's Super Early Bird promotion.

In December 2023, LearnX, an international industry educational technology awards program, awarded FIA as a Diamond Winner for Best LMS (NFP Industry).

FIA thanks our Totara provider, Androgogic, for their support in implementing the FIA Learning Hub.

# FIA Conference 2023



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.

## FIA CONFERENCE PROGRAM COMMITTEE

We would like to thank the 2023 FIA Conference Program Committee for all their hard work and dedication:

Nuz Hameed MFIA  
Nicola Long MFIA  
Gavin Coopey FFIA  
Vicki James FFIA  
Raquel Dillon MFIA  
Rochelle Nolan MFIA  
Erin Anderson  
Antonia Makkar MFIA  
Angie Retallack  
Michael Wilson

Claire Hughes MFIA CFRE  
Elizabeth Grady MFIA  
Maisa Lopes Gomes FFIA  
Alexandra Dobbie MFIA  
Bec Sott FFIA  
Dee Vodden  
Ross Anderson FFIA  
Ben Holgate MFIA  
Madeleine Estherby  
Lynda Inglis

## FIA CONFERENCE SUPPORTERS

Conference Partner



Principal Sponsors



Major Sponsors



Supporting Sponsors



Media Partner



Video Partner



Corporate Sponsor



## FIA CONFERENCE SPEAKERS

Susan Alberti AC	Nuz Hameed MFIA	Abby McPharlin
Hannah Allsopp	Meret Hassanen	Fiona McPhee MFIA
Victoria Alvarez	Bethan Hazell	Jonny Miller
Jonathan Ande	Laura Henry	Lisa Mitchell
Erin Anderson	Alex Herlihy	Dan Monheit
Christine Anderson FFIA CFRE	Jason Hincks	Darren Musilli MFIA
Erin Anderson	Cath Hoban	Erica Myers-Davis MFIA
Alice Anwar	Brian Holmes FFIA CFRE	Shanelle Newton-Clapham MFIA
Jennifer Arceo	Jasmine Hooper	Janine Owen
Karen Armstrong FFIA	Nick Hudson	Sue Parkes
Katherine Ash	Nicole Ilacqua	Martin Paul FFIA
Katie Badman	Stacey Irving	Josie Peach
Paul Bailey MFIA	Tessa Irwin EMFIA CFRE	Billie-Jay Porter
Linda Ball	Rachel Jamieson	Owen Pringle
Tom Beech	Samantha Jovceski	Ben Pritchard
Jeremy Bennett	Lauren Kara-George	Christine Robinson
Jennifer Birks	Kirsty Kennedy	Jason Ruffell Smith
Marcus Blease FFIA	Maureen Koegel	Kate Rule
Holly Bond	Debbie Kosh	Andrew Sabatino FFIA
Tony Bretherton	Sebastien Krantz	Aylin Salt
Clare Bridle MFIA	Lori Kravos	Karen Shields
Heather Bruer	Rachael Lance	Elisha Smallcombe
Simone Busija	Ruth Lee	Adrian Smith
Teigan Butchers	Naomi Lehrer	Naomi Steer
Hailey Cavill-Jaspers	Rachel Leonard	June Steward MFIA
Steffi Chang MFIA CFRE	Amelia Leotta	Ryan Storr
Cassandra Chapman	Heather Little MFIA	Alex Struthers
Lauren Clarke	Carly Little	Patrick Sukawiratmo
Peter Coleman MFIA	Elizabeth Logan	Doug Taylor
Sophie Davidson MFIA	Ryan Lonsdale	Clayton Thomas
Chandini Devasahayam	Maisa Lopes Gomes FFIA	Jennifer Thomas
Emily Dougan MFIA	Adam Lubofsky	Adelaide Thompson
Kimberly Downes EMFIA CFRE	Dave Lyndon	Tom Thurmer
Rick Dunham	Sara Mansfield	Sonya Tirtajaya
Meredith Dwyer FFIA CFRE	Isabelle Marcarian	Damian Topp FFIA
Michael Earley	Ellen Marshall	Sean Triner MFIA
Luke Edwards	Andrew Martin	Michelle Varcoe MFIA
Alexis Escavy	Sarah Matthee	Richenda Vermeulen
Stuart Evans	Lisa Matthews	Clarke Vincent
Lee Ferraro	Megan Maya	Adam Walsh
Jo Garner FFIA CFRE	Erin McCabe MFIA	Emma Watts MFIA CFRE
Paula Gething	Karen McComiskey MFIA CFRE	Carolyn Williams
Paige Gibbs FFIA	Lauren McDermott	Dan Wilson MFIA
Melinda Graetz MFIA	Victoria McKenzie-McHarg	Dean Yibarbuk
Jonathon Grapsas	Renee McLoughlin	Aaron Zelman
Craige Gravestain FFIA CFRE	Kate McMillan	Olivia Zinzan
Janet Grima	Lucy McMorron	



# FIA Awards for Excellence in Fundraising 2023

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



## 2023 AWARDS COMMITTEE

Janosh Biczok, General manager, Transformational Giving, The Salvation Army Australia  
Ben Cox FFIA, CEO, Gold Coast Childrens Hospital Foundation  
Sharon Elliott MFIA, (Chair) CEO, Ethiopiaid Australia  
Allan Godfrey FFIA, Chief Marketing Officer, Royal Life Saving Society WA  
Lucy Jacka, General Manager Fundraising, Cerebral Palsy Alliance  
Cassie Magin EMFIA, Executive Director/Co-CEO, Vitalstatistix  
Grainne Tierney MFIA CFRE, Head of Corporate & Community Partnerships, Camp Quality



## JUDGES

We would like to thank all our 2023 judges for their time and effort.

### CAMPAIGN CATEGORIES

- **Ally Murray MFIA**, The Wilderness Society Ltd
- **Arani Duggan MFIA**, Next Sense
- **Cassie Magin EMFIA**, Vitalstatistix
- **Christa Bayer MFIA**, Lung Foundation
- **Christine Anderson CRFE FFIA**, Australian Conservation Foundation
- **Claire Baxter MFIA**, Kidney Health Australia
- **Emma Watts MFIA**, SecondBite
- **Grainne Tierney CFRE, MFIA**, Camp Quality Limited
- **Hazel Grunwaldt MFIA**, Camp Quality
- **Helen Merrick MFIA**, Mission Australia - NSW
- **Jackie Evans CFRE FFIA**, The Indigo Foundation
- **Jansoh Biczok MFIA**, The Salvation Army
- **Jonathan Storey**, Environment Victoria
- **Leanne Dib FFIA**, The Children's Tumour Foundation
- **Lindsay May CFRE FFIA (Emeritus)**, Retired
- **Lisa Allan FFIA**, The Smith Family
- **Lucy Jacka**, Cerebral Palsy Alliance
- **Paige Gibbs FFIA**, Harry Perkins Institute of Medical Research
- **Rachel Murphy MFIA**, Heart Foundation
- **Rikki Andrews**, Lord Mayor's Charitable Foundation
- **Ruth Molloy**, Médecins Sans Frontières Australia
- **Stephen Bastow MFIA**, Cystic Fibrosis WA
- **Tom Duggan CFRE**, Plan International Australia
- **Veronica Lyons MFIA**, Eastern Health Foundation

### STATE AWARDS

- **Andrew Sabatino FFIA**, Donor Republic
- **Bec Stott FFIA**, Anglicare WA
- **Clare MacAdam CFRE FFIA**, The Salvation Army
- **Diane Kargas Bray AM FFIA**, Diane Kargas Consulting
- **Francesca Cinelli CFRE FFIA**, Wesley Mission
- **Heiko Plange-Korndoerfer CFRE**, Endeavour Marketing
- **Judy Ford CFRE FFIA**, Health Support Australia
- **Kerry Cutting CFRE FFIA**, Guide Dogs Queensland
- **Nola Wilmot FFIA**, The Florey Institute of Neuroscience and Mental Health
- **Ron Fairchild CFRE FFIA**, Monash Foundation
- **Stephen Mally CFRE FFIA**, FundraisingForce
- **Vicki James FFIA**, Gold Coast Hospital Foundation

### NATIONAL AWARDS

- **Ben Holgate MFIA**, Multiple Sclerosis Ltd
- **Benjamin Cox FFIA**, Gold Coast Hospital Foundation
- **Jennifer Doubell CFRE FFIA**, Jennifer Doubell & Associates
- **Katherine Raskob MIM GAICD**, Fundraising Institute Australia
- **Leo Orland CFRE FFIA (Emeritus)**, Total Fundraising
- **Meredith Dwyer CFRE FFIA**, HomeMade Digital Australia
- **Sharon Elliott MFIA**, Ethiopiaid Australia
- **Trudi Mitchell FFIA**, Australia for UNHCR
- **Vicki Rasmussen CFRE FFIA**, Charlies Foundation for Research
- **Zoe Karkas FFIA**, Why Not This & Associates

## 2023 CAMPAIGN AWARDS

### MOST INNOVATIVE CAMPAIGN

#### Winner

Peter MacCallum Cancer Foundation – *Growing the giving potential of mid-value donors*

#### Finalists

Anglicare Victoria – *AV Aid Food Truck*

Barnardos Australia – *Hiding in plain sight - Digital Campaign*

Children's Medical Research Institute – *Jeans for Genes*

Mater Foundation – *Back Up The Frontline*

Save the Children – *Regular Giving Optimisation*

### BEST PIVOT CAMPAIGN OR INITIATIVE

#### Winner

The Harry Perkins Institute of Medical Research – *Safe Harbour – A Giving Circle*

#### High Commendation

Royal Flying Doctor Service (Queensland Section) – *Guiding Lights*

#### Finalists

Australia for UNHCR – *Ukraine and Afghanistan Appeals*

Canteen – *Canteen Shop 2021*

Great Barrier Reef Foundation – *Going Digital for the Reef*

Parkinson's NSW – *Step Up for Parkinson's*

Stepping Stone House – *Sleep Under the Stars 2022*

The Smith Family – *Sponsored Student Birthday Reminders*

The Smith Family – *The Smith Family's Toy and Book Appeal 2021*

### BEST SUPPORTER EXPERIENCE

#### Winner

Cancer Council Queensland – *Ponytail Project*

#### Finalists

Australian Red Cross – *A new mid-value supporter experience*

Guide Dogs Queensland – *Guide Dogs Queensland Memorial Garden*

Kidney Health Australia – *Close the Loop Supporter Experience*

### BEST STRATEGIC PARTNERSHIP

#### Winner

Ovarian Cancer Australia – *Ovarian Cancer Australia, Hanes Brands and Coles Group for Take on Cancer in Your Undies*

#### High Commendation

Anglicare Victoria – *FOX FM Appeal "Doing It For The Kids"*

#### Finalists

Foodbank of South Australia – *Foodbank SA & RAA Mobile Food Hub*

Orange Sky Australia – *Adairs and Orange Sky*

## FUNDRAISING IMPACT THROUGH CREATIVITY

### Winner

Ethiopiaid Australia – *Ethiopiaid Christmas Campaign*

### Highly Commended

Amnesty International Australia – *Amnesty International Australia’s “Relentless” Tax Appeal*  
Ronald McDonald House Charities GWS/SEQ/SYD/SA/VIC-TAS – *Santa for Sick Kids - Christmas Appeal*

### Finalists

The Salvation Army – *The Salvation Army’s Christmas Wishes*  
UNICEF Australia – *VaccinAid: Give the World a Shot*

## IMPACT ON A SHOESTRING

### Winner

Childhood Cancer Support Inc. – *Feels Like Home - Childhood Cancer Support Grants Program*

### Highly Commended

Muscular Dystrophy NSW – *Sugar Free September*

### Finalists

Launceston City Mission – *Pay it Forward*

## FUNDRAISING IMPACT THROUGH TECHNOLOGY

### Winner

Royal Life Saving Society WA – *auRaffles Digital Platform*

### Highly Commended

Cerebral Palsy Alliance – *STEPtember 2021*

## IMPACT THROUGH EVENTS

### Winners

Harry Perkins Institute of Medical Research – *MACA Cancer 200 10th Birthday*  
Ovarian Cancer Australia – *Workout 4 Women*

### Finalists

Canteen Australia – *Canteen’s Facebook Challenges*  
Cerebral Palsy Alliance – *STEPtember 2021*

## SUPPLIER TEAM OF THE YEAR

### Winners

ntegrity – *Nominated by: The Salvation Army*  
Robejohn – *Nominated by: Royal Flying Doctor Service (Victorian Section)*

### Highly Commended

Adflex Marketing – *Nominated by: Royal Life Saving Society WA*  
Marlin Communications – *Nominated by: Prostate Cancer Foundation of Australia*

### Finalists

Dataro – *Nominated by: Royal Flying Doctor Service (Victorian Section)*  
DTV Group and Sanctuary Media – *Nominated by: The Smith Family*  
Safewill Pty Ltd – *Nominated by: Plan International Australia*  
The FIN Agency – *Nominated by: Peter MacCallum Cancer Foundation*

## MOST OUTSTANDING FUNDRAISING PROJECT

Royal Life Saving Society WA - *auRaffles Digital Platform*  
Childhood Cancer Support Inc. - *Feels Like Home – Childhood Cancer Support Grants Program*

## **VOLUNTEER OF THE YEAR**

### **National Winner**

Charlie Bennett – *MS Queensland (QLD State Winner)*

### **High Commendation**

Margaret Kelly – *Foodbank NSW & ACT (NSW State Winner)*

## **FUNDRAISING TEAM OF THE YEAR**

### **National Winner**

Harry Perkins Institute of Medical Research – Community Engagement Team (WA)

### **State Winners**

Australian Conservation Foundation – Australian Conservation Foundation Fundraising Team (VIC)

Hobart City Mission – Communications & Fundraising Team (TAS)

Sydney Children's Hospitals Foundation (NSW)

## **YOUNG FUNDRAISER OF THE YEAR**

### **National Winner**

Emily Lewis MFIA (VIC)

### **High Commendation**

Rebecca Stone (NSW)

### **State Winners**

Emily Marriott MFIA (TAS)

## **FUNDRAISING CHAMPION OF THE YEAR**

Jenna Sing - *Bendigo Health*

## **FUNDRAISER OF THE YEAR**

Lisa Allan FFIA

## **ARTHUR VENN LIFETIME ACHIEVEMENT AWARD**

Craige Gravestain FFIA CFRE

# Include a Charity



**INCLUDE  
A CHARITY**  
Make your mark

The Include a Charity campaign continued strongly in 2023 with the following objectives:

- To increase public awareness of gifts in Wills as a philanthropic act and to make it as commonly recognised and enacted as all other fundraising products.
- To develop the knowledge, experience and skills of the gifts in Wills fundraising sector in Australia to ensure best practice fundraising and promotion of member gifts in Wills programs.
- To advocate for operational and legislative change with government to smooth channels for growth in bequest fundraising in Australia.
- To encourage estate planning professionals to reference gifts in Wills during the will-writing phase or in public forums to grow and support philanthropy and campaign growth.

Include a Charity is a collaboration of many charitable organisations and members cover a range of causes - from health, medical research, education and animal welfare to the environment, community services, the arts and more.

## INCLUDE A CHARITY MEMBERSHIP

We started 2023 off with a bold push into new member acquisition in the arts with an IAC exhibition stand at the F&P ArtsRaise Conference in Melbourne in March. Several arts organisations have since joined FIA & IAC this year.



We also raised the Include a Charity profile at the annual FIA Conference and invited members and colleagues to make video clips during the event which we have shared on social media throughout the year.



## TRAINING DAYS AND EVENTS

1. **IAC Training Day: One Call away – making Calls with Confidence** – 31st January
2. **IAC Benchmarking Webinar** – 10th May
3. **IAC Training Day: Building & Growing: Successful Acquisition Models for a gifts in Wills program** – 24th May
4. **IAC Week Member Overview Webinar** – 14th June
5. **IAC Lunch & Learn - Bequest Assist Research Report** – 20th September
6. **IAC Training: Ethics & Buy-in - strengthening policies and cross-team support in Gifts in Wills** – 25th October
7. **IAC Exchange Show & Tell event** November 16th – report from IAC & WE Communications & charities to share how they used IAC assets and more on their campaigns.

## REGULAR MEMBER BENEFITS

- IAC Loop Member Update newsletter every fortnight (using Mailchimp for improved user-experience)
- E-mails on important matters and reminders.
- IAC Exchanges and discussion forums.
- Website/Member Portal redesign and development. Driving traffic to member pages through the IAC Week 2023 campaign.

## INCLUDE A CHARITY GIFTS IN WILLS CONFERENCE - JULY 20



### THEME: PLACES, PAYMENTS AND PURPOSE

**IAC Gifts in Wills Conference attendance: 207**

The Conference was a greater success than 2022 with exceptional feedback in the post-event survey. We also maximised PR with numerous attendee posts and shares on LinkedIn and IAC LinkedIn page.

### PUBLIC YEAR-ROUND PR

To drive awareness of the Include a Charity campaign and develop the objective to encourage more Australians to leave a gift in their Will we introduced a Year-round PR campaign in January 2023.

From New Year's Day to March 1 we ran two blog articles back-to-back on social media campaigns which were linked to the IAC website, driving traffic to the site and our member pages.

From March, PR agency WE Communications developed content via the Include a Charity Wills & Legal Taskforce.

Relying only on organic media coverage the campaign exceeded the set KPI for the campaign which was 50 pieces of media coverage. By November, we had shared 92 pieces of coverage across a range of mediums.

The Include a Charity campaign exceeded the media coverage KPI by 160% with an audience reach of over 30,900,000 Australians across print, broadcast and online coverage.



## INCLUDE A CHARITY WEEK – SEPTEMBER 4-10

**Tagline: Will Wonders Never Cease**

**Components:**

- Digital campaign – Facebook and LinkedIn (WE communications)
- 60 second video – for digital output (Media Unit B)
- PR Campaign (WE Communications)
- Roadshow (NSW, WA, VIC) - UK speakers Ashley Rowthorn/Dr Claire Routley Legacy Futures
- Member assets – designed and shared suite of digital banners, tiles, e-signatures, letterhead, eDM copy, media release.

**Reach: Social media sprints starting in August – into IAC week – and a week beyond**

- Campaign exceeded 95% of set KPIs for the campaign.
- Campaign crossed 2 million impressions – 739% above the campaign benchmark.
- Both the awareness and considerations metrics (Video Views and URL clicks) were 53.3% and 440% above their respective benchmarks.
- LinkedIn was a key strategic win for the campaign this year — leading to 112 new followers for the IAC LinkedIn page and numerous ad and organic shares. Analytics indicated audience largely consisted of CEOs, Legal experts, charity leaders – both GiW givers and fundraising investment influencers.
- Key media placement for Include a Charity Week included ABC Radio National (syndicating across Australia), in addition to interviews with ABC Hobart, ABC Wide Bay and ABC Perth.
- The campaign to date has achieved an audience reach over 7,200,000 Australians across print, broadcast and online coverage.
- The PR coverage achieved had a 95% inclusion of Include a Charity spokespeople.

<b>2.5m</b>	<b>251,468</b>	<b>112</b>	<b>95%</b>
<b>impressions across LinkedIn and Facebook</b>	<b>video views</b>	<b>new followers for the IAC LinkedIn page</b>	<b>KPIs achieved across the campaign</b>

## INCLUDE A CHARITY WEEK ROADSHOW:

- Total IAC/FIA member attendees across Australia – 155
- Education Workshops – 5th September (Sydney, Melbourne & online) – 20 attendees
- CEO Roundtable HLB Mann Judd Sydney – 6th September – 12 attendees
- CEO Roundtable Koda Capital Melbourne – 12th September – 19 attendees
- Legal Breakfast Aitken Partners Melbourne – 13th September – 18 attendees



## RESEARCH AND DEVELOPMENT 2023

- **More Impact** – Benchmarking (annual)
- **Legacy Foresight** – Boomers and Beyond: Report launch November 28, 2023
- **Bequest Assist** – What 3,000 bequests tell us about the people who leave them, and the effect on the future (July 2023) and Gifts in Wills Estate Administration Guidebook (Jan 24)
- **Legavision Conference in Vienna** – October 12 & 13 - with 14 delegates from Gifts in Wills/ Legacy campaigns from around the world.



## WILLS & ESTATES TASK FORCE

The Taskforce met four times in 2023 and the subcommittees met in between and developed policy proposals, a will-writers/solicitor survey (currently in market) and communications & PR output with our PR agency WE Communications.

The Taskforce also created a Productivity Commission submission (Part B of the FIA submission) for the gifts in Wills fundraising sector. The key points of the submission included:

1. Superannuation reform to allow people to choose to leave a gift to a charity when they pass away in a more efficient and non-taxed environment.
2. Probate Office reform and streamlining
3. Work with ACNC to standardise charity reporting on bequests as a separate line item in charity declarations. \*The first draft of the Productivity Commission Report has already indicated support for this point.
4. Establishment of a Notification Service and a National Will Register in Australia.

### IAC thanks to the Taskforce members:

Rohani Bixler	Sage Succession Planning
Jennifer Maher	Velocity Legal
Maureen & Morgan Koegel	Bequest Assist
Ashley Rowthorn	Legacy Futures
Rebecca Moriarty	Philanthropy Australia
Adam Herodotus	Gathered Here
Elena Di Palma	Safewill
Ross Anderson FFIA	Lost Dogs' Home
Rebecca Stalenberg	MS Plus
Bethan Hazell	Peter MacCallum Cancer Foundation
Cristina Caamano	Royal Flying Doctors SSE
Jonathan Ande	Policy & Regulatory Advisor (FIA)

## IAC ADVISORY COMMITTEE

The Advisory Committee met four times in 2023. Their oversight of campaign activities and direction is invaluable.

### We thank the committee, which comprises:

- Steve Burfield (Chair), Wesley Mission
- Suzanne Brown, Salvation Army
- Jasmine Cooper, The Smith Family
- Anne McFadden, Sydney Children's Hospitals Foundation
- Alexis Escavy, Greenpeace Australia
- Feygl Cylich, The Alfred Foundation
- Clare Allen, Lutheran Media
- Ellaine Hislop EMFIA CFRE, Perth Zoo

### Outgoing:

- Rebecca McCartney, Cerebral Palsy Alliance
- Rebecca Miller FFIA, Foundation for Australia's Most Endangered Species

It has been highly effective, beneficial and successful year for both the Include a Charity public-facing campaign and for Include a Charity members.

# FIA Foundation



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

The FIA Foundation exists primarily to advance and develop the training and education of professional fundraisers. It provides access to professional fundraising resources, facilitates industry research, aides in 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, Vice Chair and Company 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.

## 2023 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 Sponsors

## NEW SOUTH WALES

- 4Mile
- AJL Fundraising Group
- Beaumont People
- Canva Space
- Cause Recruitment
- Clarity Solutions
- COJO
- Donor Republic
- FillPak Mailing & Fulfillment
- FundraisingForce
- GiveTel
- Mondial Fundraising
- NobleCX
- ntegrity
- Rungopher
- Sanctuary Media Group
- Synergy Fundraising
- Tone Studio
- Xponential

## QUEENSLAND

- Apple Marketing Group
- Charidy
- Cornucopia Fundraising
- Homemade Digital
- Synergy Fundraising
- SuperDream
- Xponential

## WESTERN AUSTRALIA

- Change&Co
- Clue
- DGB Group
- Mailing Solutions
- Precision Group
- Safewill
- Smart Health Australia
- Synergy Fundraising

## SOUTH AUSTRALIA

- Adflex Marketing
- Bowden Print Group
- Charitabl.
- Connecting Up
- Donor Republic
- Enrite Solution
- Precision Group
- Raisers Hub
- Safewill
- Salmon Studio

## VICTORIA

- Adflex Marketing
- Amplify Fundraising
- Apple Marketing Group
- Aspire Fundraising
- Asylum Seeker Resource Centre-Catering
- Balanced Effect
- Charidy
- DGB Group
- Fundraising Logic
- Gembridge
- Give2Asia
- IVE Group
- Lander & Rogers
- Sunnyland Press
- Synergy Fundraising
- The Data Collective

## TASMANIA

- Amplify Fundraising
- Donor Republic
- The Old Woolstore

# State/Territory Committees

FIA's quality and strength comes from our State/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.

## 2023 ACT COMMITTEE

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

## 2023 NSW COMMITTEE

Nicola Long MFIA  
Anthea Cohen MFIA  
Stephen Mally FFIA CFRE  
Natasha Poulos MFIA  
Tara Tan MFIA  
Grainne Tierney MFIA CFRE  
Umesh Paramasivam MFIA  
Caitlin Bull MFIA  
Nuz Hameed MFIA  
Olga Nikitina MFIA CFRE  
Jarrod Matchett MFIA  
Katie Farina MFIA

## 2023 QLD COMMITTEE

Claire Hughes MFIA CFRE  
Benjamin Cox FFIA  
Sarah Collie MFIA  
Ann Hutchinson MFIA  
Erin McCabe MFIA  
Rowan Foster MFIA CFRE  
Matthew Lang FFIA CFRE  
Christine Anderson FFIA CFRE  
Hannah Gamston MFIA  
Clair Baxter MFIA  
Craig Gravestine FFIA CFRE (non-voting co-opted member)  
Victoria Andrews MFIA CFRE (Resigned)  
Angela Motta MFIA (Resigned)



## 2023 SA/NT COMMITTEE

Sam Jacklin MFIA  
Alix Katala MFIA  
Maurice Henderson FFIA CFRE FAHP  
Anthea Rice MFIA  
Sarah Davies MFIA  
Rebecca Miller FFIA  
James Koodrin MFIA  
Julie Calvert MFIA  
Karen Glazbrook AMFIA (co-opted)  
Helen Karapandzic (co-opted)  
Pagen Winen MFIA

## 2023 TAS COMMITTEE

Erica Larke-Ewing MFIA  
Michelle Folder MFIA  
Rebecca Cuthill MFIA  
Rebecca Townsend MFIA  
Lauren Harper MFIA  
Cath Adams MFIA  
Shanelle Newton Clapham MFIA

## 2023 VIC COMMITTEE

Antonia Makkar MFIA  
Alan White MFIA CFRE  
Hazel Grunwaldt EMFIA  
Lynne Kearney MFIA  
Emily Lewis MFIA  
Kathryn Crowley MFIA  
David Craig MFIA  
Braden Spencer MFIA  
Sharon Elliott MFIA  
Roxy Kavanaugh MFIA  
Alexandra Dobbing MFIA (Co-opted)  
Swadha Das Mohapatra (Co-opted)  
Lauren Jenkins MFIA (resigned)  
Karen McComiskey CFRE (Resigned)

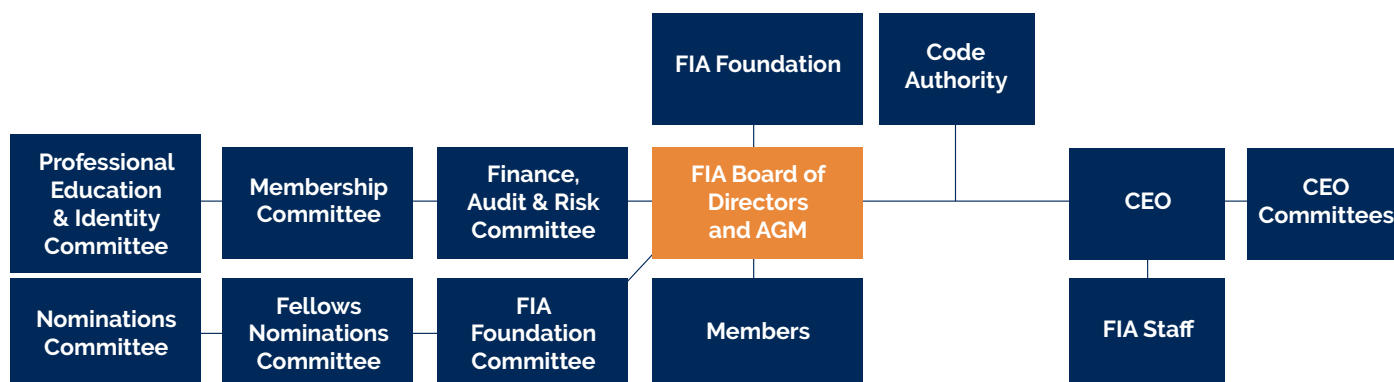
## 2023 WA COMMITTEE

Ellaine Hislop EMFIA CFRE  
Vicki Rasmussen FFIA CFRE  
Sabrina Thomas MFIA  
Lisa Miller MFIA  
Paul Ineson MFIA  
Stephen Ellis MFIA  
Brooke Webb MFIA  
Clara Millett MFIA  
Laura Kazmirowicz MFIA



# 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 2023

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 2023.



## CHAIR

**Ben Cox FFIA** (Appointed 23.2.23)

Director – Campaign Success, HomeMade Digital Australia

Appointed Director February 2020, 2012-2017; Chair Finance, Audit and Risk Committee 2021-2022;

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

Awards Judge 2014-2015; Code Authority 2017-2022.



## CHAIR

**Meredith Dwyer FFIA CFRE GAICD** (Resigned 23.2.23)

Director, HomeMade Digital Australia

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.



## VICE CHAIR & 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; WA Committee 2018 to present; FIA Conference

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

Program Chair 2016; Nominations Committee 2019 to present.



## BOARD APPOINTED DIRECTOR

**Belinda Dimovski MFIA**

Principal Director Marketing, Transformation Functional Lead, Accenture Song

Appointed Director February 2022; Professional Education and Identity

Committee 2022-present; Mentor 2023.



**DIRECTOR (VICTORIA)**  
**Alan White MFIA CFRE**

Deputy CEO, Plan International;  
 Appointed Director February 2020, Co-opted March 2019; Membership Committee 2020-present; FIA Conference Speaker 2019; Victoria Committee 2018-present; National Young Fundraiser of the Year 2019, Nominations Committee 2022-present; DEI Working Group 2021-present; Risk Committee 2022.



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

Director, FundraisingForce  
 Appointed Director March 2018; Membership Committee since 2019-present; NSW Committee 2011, 2014 – present; Mentor 2014 – 2022; FIA Webinar Chair 2016 – 2018; Conference Committee 2013, 2015, 2016, 2018, 2019; 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; TAS Committee 2015 – Present; Professional Education and Identity Committee 2019 to present.



**BOARD APPOINTED DIRECTOR**  
**Dr. Jim Hungerford FFIA GAICD**

Chief Executive Officer, The Butterfly Foundation  
 Appointed Director March 2018; Finance, Audit & Risk Committee 2018-present; 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-present.



**DIRECTOR (SOUTH AUSTRALIA/NORTHERN TERRITORY)**  
**Rebecca Miller FFIA**

Head of Philanthropy FAME Ltd  
 Appointed Director March 2021; SA/NT Committee 2016 to present; Professional Education & Identity Committee 2021; 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; Finance & Audit Committee 2021-present; Mentor 2019-2020.



**BOARD APPOINTED DIRECTOR**

**Daniel Lalor MFIA**

CEO, NiftySlabs

Appointed Director March 2021; QLD Committee 2016, 2019-2021;  
Professional Education & Identity Committee 2019-present; Mentor 2019-2020.



**DIRECTOR (QUEENSLAND) TREASURER**

**Christine Anderson FFIA CFRE GAICD**

Director of Fundraising, Australian Conservation Foundation

Appointed to Board February 2023; Chair Finance, Audit and Risk Committee  
2023 – present; Foundation Committee 2019 – present; Qld Committee 2017  
– present; Risk Committee 2022, Mentor various years.



**BOARD APPOINTED DIRECTOR**

**Elouise Holmes MFIA**

Chief Development Officer/Executive Officer Yooralla

Appointed to Board February 2023; Nominations Committee 2023



**CO-OPTED TO BOARD FEBRUARY 2023 AS ACT REPRESENTATIVE**

**Trevor Capps EMFIA**

ACT Committee 2014 – present; Conference Committee 2012; IAC  
Committee 2016

## CONSTITUTIONAL AND DIRECTOR COMMITTEES

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

### FINANCE, AUDIT & RISK COMMITTEE

Chair: Christine Anderson FFIA CFRE

Benjamin Cox FFIA

Jim Hungerford FFIA

Joe Shannon MFIA (Hon)

Lisa Allan FFIA

Alexandra Struthers

### MEMBERSHIP COMMITTEE

Chair: Stephen Mally FFIA CFRE

Allan Godfrey FFIA

Lisa Miller MFIA

Braden Spencer MFIA

### PROFESSIONAL EDUCATION AND IDENTITY COMMITTEE

Chair: Belinda Dimovski MFIA

Daniel Lalor MFIA

Michelle Folder MFIA

Rebecca Miller FFIA

Steffi Chang MFIA CFRE

Kari Musik MFIA CFRE

### RISK COMMITTEE – (merged with Finance and Audit Committee August 2023)

Chair: Benjamin Cox FFIA

Christine Anderson FFIA CFRE

Alan White MFIA CFRE

### NOMINATIONS COMMITTEE

Chair: Alan White MFIA CFRE

Meredith Dwyer FFIA CFRE

Vicki Rasmussen FFIA CFRE

Jo Garner FFIA CFRE

Elouise Holmes MFIA

### FELLOWS NOMINATIONS COMMITTEE

Chair: Vicki Rasmussen FFIA CFRE

Vicki James FFIA

Bianca Crocker FFIA CFRE

Andrew Sabatino FFIA

Nicola Norris FFIA

### FIA FOUNDATION COMMITTEE

Chair: Vicki Rasmussen FFIA CFRE

Tanya Hundloe FFIA CFRE

Peter Dalton FFIA CFRE

Christine Anderson FFIA CFRE

## OTHER KEY COMMITTEES

### DIVERSITY, EQUITY & INCLUSION WORKING GROUP

Sharney Bowen  
Gavin Coopey FFIA  
Arani Duggan MFIA  
Cortney Ginivan  
Amelia Leotta  
Francine Poisson  
Grainne Tierney MFIA CFRE  
Alan White MFIA CFRE (Board Representative)

### HEALTHCARE PHILANTHROPY CONFERENCE – STEERING COMMITTEE 2023

Chair: Nigel Harris FFIA CFRE, Nigel Harris & Associates  
Colin Allen, Sydney Children's Hospitals Foundation  
Ron Fairchild FFIA CFRE, Monash Health Foundation  
Shanthini Naidoo FFIA CFRE, St Vincent's Curran Foundation  
Vicki Rasmussen FFIA CFRE, Charlies Foundation for Research  
Lesley Ray FFIA CFRE, Mater Foundation

### 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:

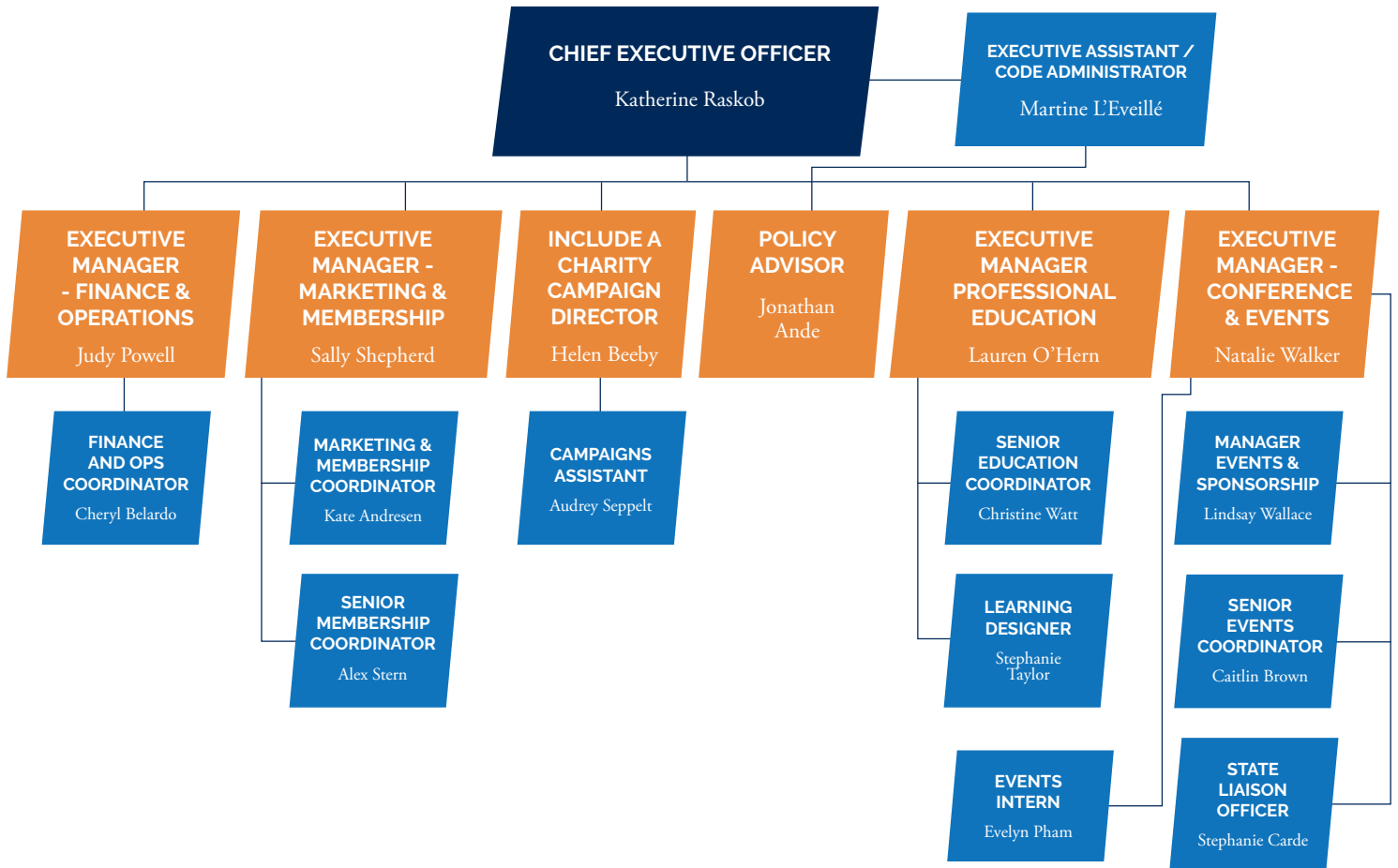
- Constitutional and Director Committees
- CEO Committees
- State and Territory Committees
- Include a Charity Advisory Committee
- Presenters and tutors at education and training events
- Awards judges
- Other committees and working groups

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.

## MEET THE TEAM



# Financial Report

## STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME for the Year Ended 31 December 2023

	Note	2023 \$	2022 \$
Revenue	2	4,842,391	3,751,848
Administration expenses		(104,492)	(164,792)
Conference, workshop and campaign expenses		(2,108,947)	(1,523,662)
Occupancy expenses		(357,560)	(174,286)
Employee benefits expense		(2,167,780)	(1,827,745)
Depreciation and amortisation	3	(11,577)	(8,538)
		<hr/>	<hr/>
		(4,750,356)	(3,699,023)
		<hr/>	<hr/>
<b>Net Surplus/(Deficit)</b>		<b>92,035</b>	<b>52,825</b>

## STATEMENT OF FINANCIAL POSITION

as at 31 December 2023

	Note	2023 \$	2022 \$
<b>ASSETS</b>			
<b>Current Assets</b>			
Cash and cash equivalents	6	3,799,901	3,538,208
Receivables	7	210,389	291,437
Other assets	8	0	2,300
<b>Total current assets</b>		<b>4,010,290</b>	<b>3,831,945</b>
<b>Non-current assets</b>			
Software, plant and equipment	9	29,065	21,745
Rebrand and Development costs	17	-	-
Right to use assets	18	838,990	109,279
<b>Total non-current assets</b>		<b>868,055</b>	<b>131,024</b>
<b>TOTAL ASSETS</b>		<b>4,878,345</b>	<b>3,962,969</b>
<b>LIABILITIES</b>			
<b>Current liabilities</b>			
Payables	10	327,593	341,441
Provisions	12	41,925	51,922
Deferred income	11	2,302,949	2,228,422
Funds held on trust		58,898	56,727
Lease liabilities	18	194,371	82,002
<b>Total current liabilities</b>		<b>2,925,736</b>	<b>2,760,514</b>
<b>Non-current liabilities</b>			
Provisions	12	87,993	47,215
Lease liabilities	18	644,619	27,277
<b>Total non-current liabilities</b>		<b>732,612</b>	<b>74,492</b>
<b>TOTAL LIABILITIES</b>		<b>3,658,348</b>	<b>2,835,006</b>
<b>NET ASSETS</b>		<b>1,219,997</b>	<b>1,127,963</b>
<b>EQUITY</b>			
Accumulated funds		1,219,997	1,127,963
<b>TOTAL EQUITY</b>		<b>1,219,997</b>	<b>1,127,963</b>



## STATEMENT OF CHANGES IN EQUITY for the Year Ended 31 December 2023

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>

2023	Accumulated Funds	Total
	\$	\$
Balance at 1 January 2023	1,127,963	1,127,963
Surplus for the year	92,035	92,035
<b>Balance at 31 December 2023</b>	<b>1,219,997</b>	<b>1,219,997</b>

## STATEMENT OF CASH FLOWS for the Year Ended 31 December 2023

	Note	2023	2022
		\$	\$
<b>Cash from operating activities:</b>			
Receipts from members and customers		5,258,655	4,117,656
Payments to suppliers and employees		(5,039,860)	(3,174,655)
Interest received		61,796	8,524
<b>Net cash provided by/ (used by) operating activities</b>	<b>14</b>	<b>280,591</b>	<b>951,525</b>
<b>Cash flow from investing activities:</b>			
Payment for non-current assets		(18,898)	(22,134)
<b>Net cash (used in)/provided by investing activities</b>		<b>(18,898)</b>	<b>(22,134)</b>
<b>Net increase/(decrease) in cash and cash equivalents held</b>		<b>261,693</b>	<b>929,391</b>
Cash and cash equivalents at beginning of financial year		3,538,208	2,608,817
<b>Cash and cash equivalents at end of financial year</b>	<b>6</b>	<b>3,799,901</b>	<b>3,538,208</b>

## INDEPENDENT AUDITOR'S REPORT

To the Members of Fundraising Institute of Australia

### Opinion

We have audited the accompanying financial report of Fundraising Institute Australia, which comprises the statements of financial position as at 31 December 2023, the statements of profit or loss and other comprehensive income, the statements of changes in equity and the statements of cash flow for the year ended, notes comprising a summary of significant accounting policies and other explanatory information, and the responsible entities' declaration of the Company.

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

- i) giving a true and fair view of the Company's financial position as at 31 December 2023 and of its financial performance for the year then ended; and
- ii) complying with Australian Accounting Standards and the financial reporting requirements of the Australian Charities and Not-for-profits Commission Regulation 2013.

### Basis of opinion

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

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

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

### Other information

The responsible entities are responsible for the other information. The other information comprises the information in the Company's annual report for the year ended 31 December 2023, but does not include the financial report and the auditor's report thereon.

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

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

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

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

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

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

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

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

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

KS Black & Co  
Chartered Accountants



Phillip Jones  
Partner

Dated at Sydney on 31<sup>st</sup> January 2024

The logo for the Fundraising Institute Australia (FIA) consists of the letters 'FIA' in a white, serif font, set against a dark blue rectangular background with a thin orange vertical stripe on the right side.

**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:



**Prepared by Fundraising Institute Australia**

**31 December 2023**

**PO Box 549 Crows Nest 1585**

**P: 1300 889 670**

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

**ABN: 51 943 541 450**

**ACN: 088 146 801**