

ChapTalk



FUNDRAISING INSTITUTE AUSTRALIA (CHAPTER 1) SPRING 2008
PRINT POST APPROVED NO. PP332099/0005
WEBSITE: WWW.FIA.ORG.AU



President's Welcome

As fundraisers we know that valuing our donors, respecting their rights, listening to their needs, sharing their passion and excitement and recognising their contributions are all imperative in good donor care. In fact, developing long-term relationships with our donors is at the heart of all good fundraising programs.

So if this is true – what efforts do we commit to the people working as fundraisers? Surely if we want to have a relationship with a donor for the long-term, then the same needs to be said of an organisation's relationship with their fundraiser? Do we really pay enough attention to the needs of staff in our sector? Are we retaining fundraisers long enough, and do young people see fundraising as a career or a stepping stone?

I recently had the pleasure of a 'catch up' meeting with a group of fundraisers who undertook MDU last year. We

discussed the issue of attracting good staff and keeping great young people in the nonprofit sector. Last year I was also present at a meeting with senior fundraisers (the President's Circle) whereby the same issue was being lamented.

How do we keep good people in fundraising and not lose great talent to the 'for-profit' sector?

Surely it is not just about the money? Maybe the lack of resourcing is taking a toll and producing high burn-out rates? Are the pressures of our sector

really that different to the corporate world – or is it that the support systems are just not as strong?

This issue is one that I would like to see further debate and discussion around so that we can ensure that we are creating some real solutions, rather than just bemoaning the problems. In the first instance, I would love to hear your views, especially if you are thinking about dropping out of fundraising - Why? (*Your feedback will be kept confidential of course.*) Is there support that we as FIA could consider providing to members so

that our industry retains its high achievers? Is burn-out a real issue for all fundraisers or just younger fundraisers? On the other hand, have you found a solution to retain great staff? If so, we'd love to hear what has worked well and compile these learnings to share with colleagues. Please send me your feedback to sharon.hillman@austin.org.au

Fundraising is still a growing profession, and I am excited by the changes over recent years in

the demographical shifts we are witnessing in fundraising professionals. As more people enter fundraising at a younger age, I personally believe that now is the time for us to seriously discuss, and aim to address issues of 'professional retention' and realistic 'career pathways' within our industry.

I look forward to hearing from you about this issue, or any other issue / ideas relating to our profession, and particularly to the way in which FIA is supporting you (as our members) in

Chapter 1. We are here to strengthen our profession, and in turn, our communities. Together – I know that we can and will achieve this goal.



Sharon Hillman FFIA
FIA President, Chapter 1

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Melbourne's Gentleman of Fundraising leaves for Cambridge

by Tina Price MFIA



Tina Price: Peter, many fundraisers have interesting career changes and events that lead them to fundraising. Tell me about your extensive career and how you came to find yourself in the fundraising sector.

Peter Dalton: I worked for 10 years in Public Relations principally for John Siddons, of Sidchrome Spanners fame, who was also involved in the Australia Party and the political split that resulted in the Australian Democrats formation. When the Democrats were formed I was invited to be Don Chipp's Principal Private Secretary. However after three years and with a young family, the long hours, travel and "hurley-burley" of political life became too difficult and I sought another career.

Little did I realise the long hours, travel and "hurley-burley" would remain unchanged in fundraising!

One of Melbourne's most respected and experienced fundraisers Peter Dalton CFRE FFIA has accepted a bio medical fundraising directorate at Cambridge University with the Addenbrooke's Charitable Trust, Cambridge University Hospitals National Health Service Foundation.

Through connections I took on a position as Director of the Australian Freedom from Hunger Campaign in Victoria which introduced me to the non-profit sector. After some time I was fortunate enough to be invited to join the DVA Fundraising consultancy, as it was known then, and was privileged to be mentored by Arthur Venn FFIA. My briefs focused primarily on capital campaigns for clients including the Australian Ballet, Sovereign Hill, the Royal Flying Doctor Service and independent schools.

This followed with a period of ten to twelve years in my own fundraising consultancy Peter Dalton and Associates, working on strategic planning and capital campaigns for a variety of institutions from a broad range of sectors: local government, sport, religion, the arts, health and education.

I became the Director of Fundraising at the Austin Health about six years ago.

TP: I notice that you include the word "Fundraising" in your title. It seems in recent times Philanthropy has replaced this in many of our titles. How do you feel about that?

PD: I'm not a career philanthropist; I'm a fundraiser. I am proud of my profession, proud to be a fundraiser. I'm insistent on it in my position title.

TP: Can you tell everyone a bit about your work at Austin Health?

PD: The brief I was given was to develop a Total Development Fundraising Program. In addition I was to raise AUD\$50 million for a new Austin Health Cancer Services building.

I was conscious, before accepting the position, that the Austin had limited established networks philanthropically or corporately, and limited brand awareness or public profile.

TP: With that in mind when you accept a position like that, what do you negotiate beforehand?

PD: A number of things are non-negotiable for me as a fundraising professional. It is essential that I can make presentations directly to the Board and the CEO. To do what needed to be done I needed institutional support to invest in the development function ... Yes, budget support, to invest in new initiatives, donor acquisition, uncompromising naming rights, marketing, restructuring and the like.

I am pleased to say that the Austin was wonderfully supportive. I could definitely see the potential of the hospital given its excellence as a major public teaching hospital and the undoubted respect for its international research. My first task

was to work with the Austin's Corporate Communications Department to increase the hospital's visibility and market reach.

TP: In more recent times you are synonymous with the Olivia Newton-John Cancer and Wellness Centre Appeal. Tell me how the Olivia Newton-John connection came about.

PD: I had concluded that the Austin needed repositioning to affect a successful capital appeal. It needed a new personality! A shortlist of high profile names was compiled and Olivia was on the shortlist. Further research showed that she had family in Australia and there was a tenuous family connection with the Austin. But using effective donor research and prospecting techniques, it was a good four to six months before we even made the ask, to invite Olivia to tour the Austin.

Olivia value-added to the whole proposition, introducing the idea of a wellness centre, integrating complementary therapies with traditional cancer treatments, improving the patient's overall quality of life by introducing a holistic mind, body, spirit approach to patient care. I think this example highlights the impact that Appeal Leadership can have on a major

institution, influencing core practice and thinking. Integrated therapies are now endorsed and accepted in the new cancer centre treatment plans.

TP: So, there is more to fundraising than meets the eye?

PD: Absolutely. Fundraisers CAN influence the marketing, the branding and the very positioning of their organisations, which in turn can dramatically affect their ability to raise money. Fundraisers should encourage their organisations to market themselves appropriately and aggressively, actively engaging their marketing and public relations departments.

TP: You recently completed the Great Walk in China, which was an international fundraising campaign with several objectives. Were you pleased with the outcomes of that rather large multimedia event?

PD: It was sensational. It was an extraordinarily ambitious event by any measure. One of the objectives was to raise money and the fundraising component (conducted principally online) netted \$3 million. Another objective was to acquire new donors and the Austin now has 7,000 new donors. Additionally

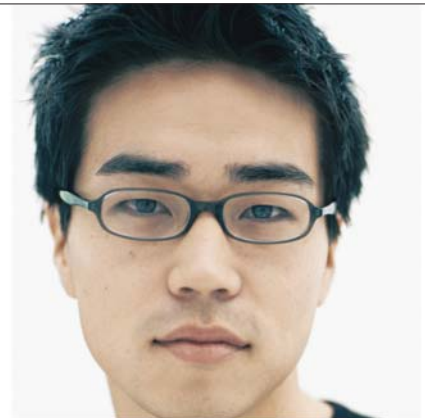
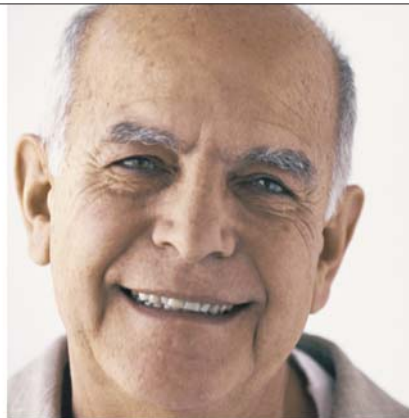
the event created unprecedented brand awareness; raising the profile of the Austin's global research arms in the US, UK and China. We accomplished this with penetrating media coverage in all three countries.

I am very pleased with the results. Whilst some results will be measured immediately others will bear fruit over the long term. I think we have created a strong global awareness for future work in those areas and the value of that cannot be underestimated, particularly in fundraising terms.

TP: Have you any pearls of fundraising wisdom you can share with us?

PD: Build your personal networks internally and externally to your organisation, you will carry them with you wherever you go. And never underestimate the extraordinary impact you, as a professional fundraiser, can have on your organisation.

TP: Thank you Peter. Thank you for also giving to your peers through your work at Fundraising Institute Australia during your extensive career. We hope you will visit us occasionally when the winter bites too hard in the UK.



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FIA National Awards for Excellence in Fundraising - Call for Entries NOW OPEN

Recognise, acknowledge and celebrate achievement

FIA's National Awards for Excellence in Fundraising are a key component of our commitment to best practice in fundraising and a celebration of fundraisers' successes. The Awards are an opportunity for recognition of outstanding initiatives and financial results exceeding industry benchmarks. The Awards encourage professional practice and promote the role of fundraisers in achieving goals that make our society a better and more equitable place in which to live and work.

As fundraisers, celebrating success should be part of what we do.

Entries are first judged at a State (Chapter) level. State Award winners are then judged at the National level. National winners will be announced at a gala event during FIA's 32nd International Fundraising Conference in Sydney, the largest gathering of fundraisers in the southern hemisphere (28 February – 3 March 2009).

FIA members can enter in nine Award Categories:

- Campaigns/ Major Gifts
- Budget Acquisition
- Budget Renewal 
- Special Events
- Bequests
- Fundraising Marketing
- Cadbury Fundraiser Volunteer of the Year 
- Young Fundraiser of the Year
- Fundraiser of the Year

Entry forms for FIA's Awards are available NOW. Visit www.fia.org.au

The closing date for submissions is Friday 3 October 2008

For more information on FIA's National Awards for Excellence in Fundraising please contact

Judy Orford AMFIA
03 9830 7211
jorford@fia.org.au



Why are there so many major gift and bequest positions and so few people applying?

Michelle Caldwell MFIA investigates

Why is it so?

Traditionally major gift and bequest roles have been offered in organisations with a large fundraising team. However with the maturation of fundraising in Australia other organisations have seen the advantages of employing fundraisers in these roles.

But don't take my word on it. Richard Green, Director of recruitment company NGO Recruitment said of his research into major gifts that it "backed up our intuition that many sophisticated fundraising organisations are now moving into major gifts including bequests. There is now increased demand for major donor and bequest positions from across a range of NGOs."

Kate Clarke, Operations Manager for Final5 agrees, adding that "it's only in recent years that specialising in bequests as a career has been an option and therefore the skill group is small". Kate states "bequest roles have provided the biggest challenge with very few or no applicants in the market".

Why wouldn't people want to work in these roles?

Fear of asking for money, the time lag in getting results and the length of cultivation of relationships may well answer this.

Sharon Hillman FFIA feels that the "huge targets attached to major gifts can be outside of peoples' comfort zones". She also feels that these roles require more of a long term view of relationships rather than focusing on getting the money now.

Kate says that "fundraising is often driven by marketing activities such as direct mail, event management and strategic alliances with the corporate sector. General consensus is that these skills don't bring long term relationships or the skills required when asking for a major gift or a bequest".

And what can employers do to help themselves recruit for these positions?

Kate suggests that organisations be flexible on hours and think about a part time position rather than full time.

Also consider people with corporate backgrounds as well as people with transferable skills, not necessarily with bequest or major gift experience. Emphasise the benefits and opportunities of working in the non-profit sector, something she feels we don't do well.

Richard believes if the position really needs someone with experience in major gift or bequest fundraising - then the organisation should stick with it until they find someone. Saying that, he points out that the experience can come from outside the non-profit sector for instance with bequest experience from roles involved in estate planning.

Another reminder from Richard is that with a major gift or bequest position, the organisation is investing in the individual – "what you see is what you get – their personality, experience and their brain", unlike other aspects of fundraising with expenses like paying for mailing lists/acquisitions, mailings, developing creative for campaigns etc.

My conclusion?

A few things stand out to me but the obvious one is that organisations need to look after their fundraising staff. Replacing staff is more costly than retaining those you already have. Our fundraising networks are also important as they will help us to recruit. Since most of us are part of a fundraising network, we also need to protect our individual reputation in the sector, not only because of our own moral code but also as many of our job opportunities come up through word of mouth.

And finally, if you are a people person and aren't fearful of asking for money then why not put your hand up for one of these roles!

Senate Inquiry

Members and the organisations that they work with, are encouraged to provide a submission to the Senate Standing Committee on Economics inquiry into our sector.

The ***Inquiry into the Disclosure Regimes for Charities and Not-For-Profit Organisations*** will receive submissions until 29th August 2008.

The inquiry will examine:

- (a) the relevance and appropriateness of current disclosure regimes for charities and all other not-for-profit organisations;
- (b) models of regulation and legal forms that would improve governance and management of charities and not-for-profit organisations and cater for emerging social enterprises; and
- (c) other measure that can be taken by government and the not-for-profit sector to assist the sector to improve governance,

standards, accountability and transparency in its use of public and government funds.

FIA has conducted a series of webinars and meetings to gauge members' views on this extremely important topic in our industry, to assist in making the Institute's own submission.

However, members who have been considering whether to forward a submission or not are still encouraged to do so, as there may be significant elements within your organisation's operations that merit individual consideration by the inquiry.

A background paper can be accessed at

http://www.aph.gov.au/senate/committee/economics_ctte/charities_

08/backgroundpaper.pdf and should be read prior to submissions being made.

Stephanie Wong, Policy Officer is co-ordinating the FIA response to the Inquiry and would appreciate any submissions being copied to her at swong@fia.org.au

Submissions may be forwarded electronically to:

economics.sen@aph.gov.au

Or by mail:

Committee Secretary
Senate Economics Committee
Department of the Senate
PO Box 6100
Parliament House
Canberra
ACT 2600

Second Fundraising LEADERSHIP Program

GIVE US FOUR DAYS!
We'll give you a new perspective on leadership for fundraising professionals.

5 – 9 November 2008
Mt Eliza
Centre for Executive Education
Mornington Peninsula, Victoria

FIA'S Biennial Program for Senior Fundraisers

Learn with your peers, covering advanced professional issues in fundraising and philanthropy, transformational leadership and social marketing.





Second Fundraising Leadership Program

INSIGHTS FROM THE EXPERTS

5-9 November 2008

**Mt Eliza Executive Education
Mornington Peninsula, Victoria**

The Fundraising Leadership Program (FLP) is back for its second year. Come and join other fundraising professionals where you will spend an intensive four days covering advanced professional issues in fundraising and philanthropy, transformational leadership and social marketing.

FIA is, once more, bringing together expert staff from the United States and Australia to lead you through a 4-day program designed to address your executive needs as fundraisers and senior staff in the non-profit sector.

Attending this program will provide significant benefit to your organisation and to your career development. We look forward to welcoming you to the second FLP: Insights from the Experts. Please visit our website www.fia.org.au for more details and how to register.

Diary Dates

SEPTEMBER

Wednesday 10: Professional Development Luncheon with Derek Glass MFIA

Wednesday 17: FIA's latest initiative 'New Networks' will be an opportunity for new and young fundraisers to meet like-minded networks and share ideas in an interactive forum. We are looking to run 6 workshops over the next 12 to 18 months.

Friday 19: Special Interest Group: Bequests

Dates TBC: Skills 1 Course – The Foundations of Fundraising

Dates TBC: Skills 2 Course – Building on the Foundations of Fundraising

OCTOBER

Friday 3: Special Interest Group: New Fundraisers

Wednesday 8: Professional Development Luncheon

Dates TBC: Skills 3 Senior Level Fundraising Course

NOVEMBER

Wednesday 5 - Sunday 9: Fundraising Leadership Program

Wednesday 12: Professional Development Luncheon

Friday 28: Special Interest Group: Direct Marketing

Date TBC: Special Interest Group: Major Gifts

DECEMBER

Wednesday 10: FIA's Awards for Excellence in Fundraising End of Year Celebration

FIA Member Services Department

STREET ADDRESS: Level 1, 210-212 Canterbury Road, Canterbury 3126

POSTAL ADDRESS: PO Box 1447 Camberwell East VIC 3126

PHONE: 03 9830 7211 Facsimile: 03 9830 7255

CONTACT: Judy Orford, Chapter 1 Consultant

EMAIL: jorford@fia.org.au

New Members

Chapter 1 would like to welcome the following new members who have recently joined us:

Kathy Nightingale	ACCESS Ministries
Martin Angelin	ASI (Asia-Pacific)
Judith Williams	Australian Breastfeeding Association
David Ayliffe	Australian Red Cross Victoria
Rebecca Paton Broad	Australian Red Cross Victoria
Melissa Sexton	Australian Red Cross Victoria
Liz Balogh	Bush Heritage Australia
Paul Evans	Bush Heritage Australia
Jame Daffey	Care Australia
Erica Roden	Care Australia
Bonnie Thomson	Diabetes Australia - VIC
Jackie Stoneman	Guide Dogs Victoria
Nicola Ryan	Guide Dogs Victoria
Carl Young	Heart Foundation of Australia (Victorian Division)
Hayley Skinner	Intensive Care Foundation
Joshua Donchi	Kidney Health Australia VIC
Annette Smith	Kidney Health Australia VIC
Paula Gething	Kildonan Uniting Care
Melinda Maskiel	Monash University
Louise McCarthy	Monash University
Alix Fletcher	Murdoch Childrens Research Institute
Olivia Passmore	NGO Recruitment
Dean Felton	Northern Health
Lucy Holloway	Peter MacCallum Cancer Foundation
Christine Davies	Shepparton Retirement Villages Inc
Lara Denes	St Mary's House of Welcome
Sarah Henderson	The Living Trees Project
Bram Peck	The Salvation Army
Katrina Flannery	Uniting Aged Care
Emily Werner	Juvenile Diabetes Research Foundation
Saneliso Dowa	Anglicare VIC
Lee Conway	YMCA Victoria
Sue Noy	Environment Victoria
Dimi Hoppe	Eastern Health