

IAC Exchange IAC Week 2024 Show & Tell & Troubleshooting Problems



11th November 2024



WE Communications



Communication - PR

Year-round PR from April 2024

- Our Include a Charity campaign (7 months) generated **23 pieces of coverage** with an audience reach over 21,560,000 Australians across print, broadcast and online coverage.
- Key media placement for Include a Charity Week included organising spokesperson and case study interviews with **Nine.com.au, Business News, ABC Wide Bay, HR Leader, Financial Standard and SMSF Adviser.**
- It was also extensively covered by charity and senior publications, including **The Advocate, F&P, DARE and Australian Senior.**
- The PR campaign in the lead up to and during the week engaged a number of charities like **Cottage by the Sea and Peter Mac Alfred Foundation, UNHCR, Cerebral Palsy Alliance, MS Plus, and Children's Medical Research.**
- The earned coverage achieved had a **95% inclusion of Include Charity spokespeople**, including international guests Dave Smith from Heaton Smith Group, Helen Beeby – Campaign Director at IAC, Katherine Raskob, Chief Executive of Fundraising Institute Australia and Rohani Bixler, Principal Lawyer at Olivetree Legal.

23 Pieces of coverage	21.5m+ Audience Reach
100% Positive Sentiment	95% Incl. an Include a Charity Spokesperson



Coverage Snapshots



A role that has purpose: Retention and talent attraction in the charity sector

By Kace O'Neill | May 16, 2024 | 6 minute read

SHARE THIS ARTICLE



Mary's giving away \$25,000 when she dies - and she wants other Baby Boomers to do the same

By Maddison Leach | 15th Jun 6, 2024



Wednesday, 14 June 2024, 7:51. Mary Lansell, 75, is leaving \$25,000 to charity in her will. Photo: MacCallum Cancer Centre/Leanne Braxton.

The 73-year-old from Melbourne is one of a growing number of Aussies opting to leave a charitable gift in their will in the hopes of making a difference after they've died, with Lansell leaving her cash to Peter MacCallum Cancer Centre.

In the last decade alone, Include a Charity (IAC) has seen a doubling of gifts in wills for charities as Australia's ageing population considers where their wealth will go when they're no longer around.

"Being part of the Baby Boomer generation, we're coming to an end sooner rather than later and we certainly have the opportunity to do something about a donation," Lansell said.



BUSINESSNEWS

Impact of leaving a legacy in your Will

By Kathy Skantzos | 03/09/2024 - 08:00

HEARTS AND MINDS

Held in the first week of September, Include a Charity Week is a reminder of the impact you can make for a cause close to your heart through leaving a gift in your Will.

Gen X has the willpower charities need

Posted on 28 Aug 2024

By Ashley Rowthorn, CEO, Legacy Futures



AUSTRALIANSeniORSNEWS.COM.AU

HEALTH

Call to include a charity in your Will

August 27, 2024

Speaking on the initiative, Helen Beeby, Campaign Director, Include a Charity (IAC), says, "As humans, we are driven by the desire to leave a legacy—a meaningful imprint that continues beyond our lifetime, inspiring future generations. Gifts in wills account for 25% of all fundraising revenue in Australia and include a Charity research indicates the annual figure to be about \$1.6 billion.

"This shows how many people make this important commitment, and we want it to become the norm for everybody. Including a gift in your Will signifies your dedication to causes that hold personal significance: whether it's advancing medical research, nurturing the arts, protecting animals, aiding vulnerable communities, or preserving the environment.



Gen X has the willpower charities need

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GIFTS IN WILLS | AUGUST 23, 2024

Include a Charity Week looms, and the campaign is striking a chord

Since Include a Charity launched, bequest revenue has more than doubled and accounts for a quarter of all fundraising in Australia.

By Helen Beeby



FINANCIAL STANDARD

Respecting your wishes: A look inside superannuation death nominations



BY ROHANI BIXLER | FRIDAY, 14 JUN 2024 | 2:43PM

Consider this scenario: You're 32 years old. A few years ago, after many years of saving, you moved into your first home, leaving your mum who had raised you as a single parent in your childhood residence.

You have signed a binding death benefit nomination giving your superannuation to your mum, but have not made a Will ... after all, who needs a Will at 32?!

September-October 2024 / \$9.95

DARE

The time of your life



A LEGACY OF KINDNESS

Leaving a gift to charity in your will could make a world of difference.

WORDS: TEREZ BISHOP

If you've been wanting to make an impact on the world but aren't sure how to go about it, the answer might be simpler than you think.

Helen Beeby, fundraising facilitator at the Fundraising Institute of Australia, says leaving a gift to a charity in your will is a meaningful way to make a statement about the type of person you want to leave behind.

"It's a future investment in the world and the causes that you care about beyond your lifetime," she says. "It's not the same as

just deciding to put a coin in a tin, which is very immediate. It's really about looking out across your whole life story: what you've done, what you've cared about, and then projecting that forward into what you want the world to look like after you're gone."

During Include a Charity Week (2-6 September), Helen is encouraging all Australians to consider leaving a gift in their will to a charity organisation that aligns with their values and hopes.

"It's the largest gift most people will ever make," she says, adding

that around one-quarter of the income for many charities comes from gifts in wills. According to the Big Day NOW, ACE, one out of every three guide dogs are funded by gifts in wills, while National Stem Cell Foundation of Australia says legacies go towards research into new medical treatments.

HOW TO DO IT

To give a gift in your will (sometimes called a bequest), you need have it written into your will so that it's legally binding. In 50% of gifts in wills, people



THE COMMUNITY Advocate.

Not-for-profit sector news, views and issues | May 8, 2024

FUNDRAISING

Closing the fundraising skills gap

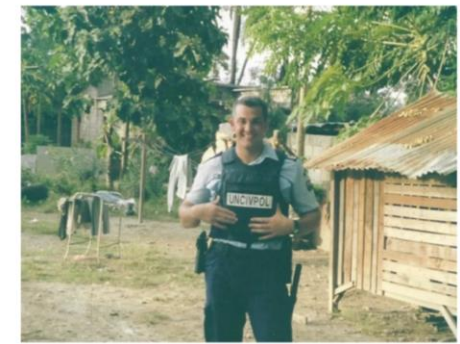
The nation's peak body representing professional fundraisers, Fundraising Institute Australia (FIA), has called on the federal government to officially recognise "fundraiser" as a skilled occupation.



COMMUNITY

Australians are encouraged to 'Be the Spark' for this year's Include a Charity Week

By Ryan Fells | September 2, 2024



Include a Charity Week Results - Digital

Social media sprint starting in August 2024 – into IAC week – and until end of September

- The campaign exceeded 90% of set KPIs for the campaign.
- Most significantly, the campaign crossed 1.6 million impressions and over 12k visits to the campaign landing page – **100% above the campaign benchmark.**
- Strong awareness and consideration successes among core target audience with both video views and Avg CTR - **67% and 122% above their benchmarks.**
- LinkedIn has carved itself as a key thought leadership channel for IAC with this year's campaign seeing great engagement from both business professionals but also IAC and FIA member organisations.

1.6m Impressions across Facebook and LinkedIn	364,002 Video Views
1.04% LinkedIn engagement rate	90% KPIs achieved across the campaign

IAC Website Landing Page – 12K Visitors

Top Performing Ad (Facebook)



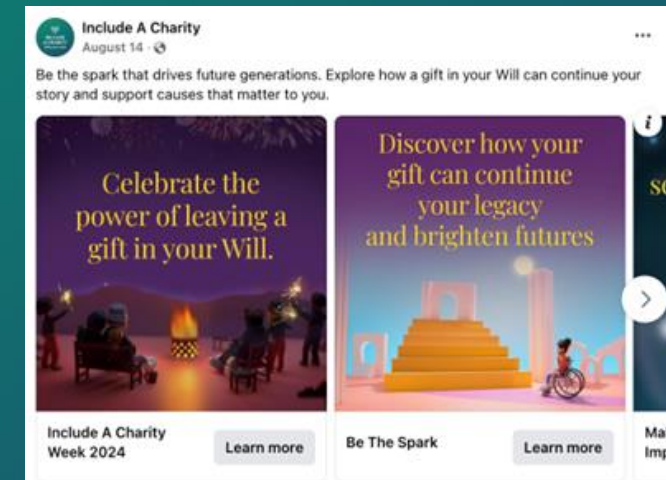
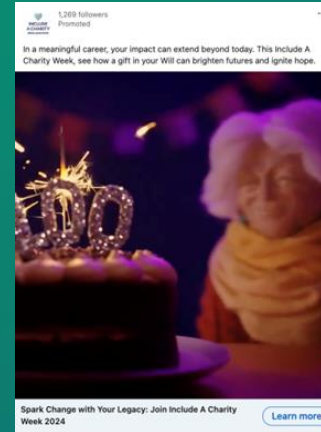
Top Performing Ad (LinkedIn)



Include a Charity Week Results - Digital

Social media sprint starting in August 2024 – into IAC week – and until end of September

- The top performing ads across both Facebook and LinkedIn were carousels, showing the value of this format in driving more engagement as it occupies more real estate on people's screens and allows us to lean on a stronger storytelling approach compared to a video or static ad.
- Unlike last year, bulk of clicks and engagements this year were driven by the older demographic for both the awareness and engagement campaign.
- As a result, we pivoted strategy for the remarketing campaign to only target the older demographic.





INCLUDE
A CHARITY

FIA

Fundraising
Institute
Australia

IAC Week Campaigns

Sandra Rosano, Grants & Bequests Officer
Villa Maria Catholic Homes



VMCH History

Bequest Program

The Lunch

Showcasing Good Works in Action



Fawkner Fellowship Luncheon

Supporting our mission

12 September 2024

65 Guests







Gifts in Wills Impact



 **INCLUDE
A CHARITY**

FIA Fundraising
Institute
Australia

IAC Week Campaigns

Jess Avery, Relationship Manager
Sydney Children's Hospitals Foundation



CAMPAIGN DURATION 1 Aug – 16 Sept

FOCUS

- Increase engagement & awareness
- Acquisition of new supporters to PG

FY25 x49 vs FY24 x30 + FY23 x26

ACQUISITION OVER CAMPAIGN PERIOD

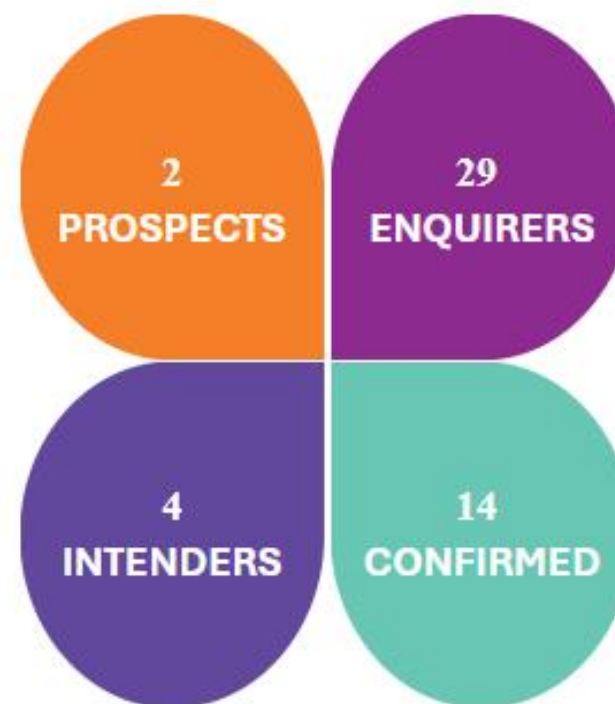
1 AUG – 16 SEPT

Sydney Children's Hospitals Foundation
SCHF

INCLUDE A CHARITY

Include a Charity Week
2 - 8 September
A gift in your Will can help shape the future of kids' health

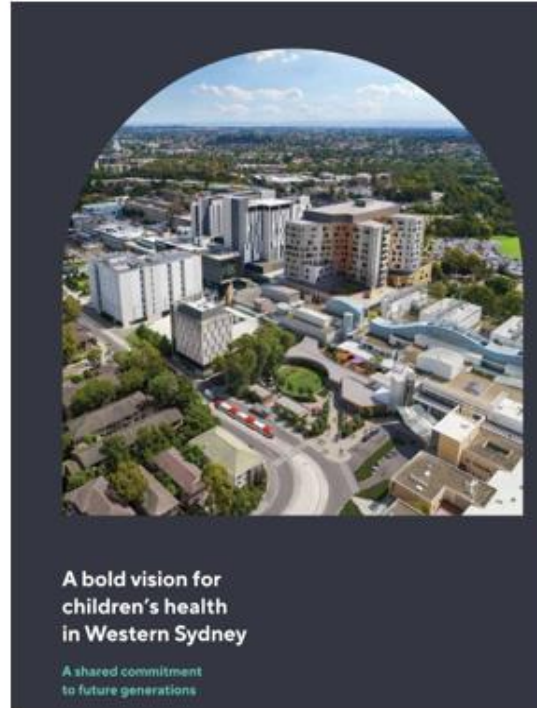
LEARN MORE



CAUSE + CAMPAIGN NARRATIVE

INTENDERS + CONFIRMED - Prototype (mock site tours) for stewardship

The redevelopment of **Sydney Children's Hospital Randwick** +
the **Children's Hospital at Westmead**



**UNKNOWN, PROSPECTS +
ENQUIRERS**

Coen, Gabriele-de Vries
syndrome



ACQUISITION + ENGAGEMENT BY SOURCE

	OTHER	KAN	SM	GOOGLE	EDMS	PIFS	ONLINE WILLS	TOURS	MAIL	TTL
PROSPECTS		1			1					2
ENQUIRERS			28						1	29
INTENDERS	3								1	4
CONFIRMED	4			1	1		8		1	15
RESPONDED					6	21		19		46
ATTENDING								14		14
RTS									138	138
PHONE										70
DONATIONS										\$545

CAMPAIGN ASSETS

x2 <u>edms</u> : sent 2 & 9 Sept	Regular Giving newsletter
x2 mail <u>letters</u> : sent 1 Aug	Paid advertising
Paid (12/8-16/9) + Organic social media (2/9)	INTERNAL - The Movement (staff newsletter)
SCHF PG + GH Webpage updates	INTERNAL – Lunch & Learn
SCHF e-signature	• Mock site tours x2: <u>Westmead</u>

INCENTIVES

- Free Online Wills offer via Gathered Here
- Free Information Packs – soft + hardcopy



EDM1 - 2 Sept



Sydney Children's Hospitals Foundation




INCLUDE A CHARITY

Include a Charity Week

2 - 8 September

A gift in your Will can help shape the future of kids' health

LEARN MORE

Dear Jessica,

Sydney Children's Hospitals Foundation (SCHF) is proud to once again be participating in *Include a Charity Week - Be the spark - brighten tomorrow through a gift in your Will*, this week (2 - 8 September).

Include a Charity Week is a nationwide, annual social change movement that highlights the significance of including a charitable gift in your Will.

At SCHF, we are honoured to play a pivotal role in this movement, witnessing firsthand the profound impact that legacies, from individuals like you, can have on the lives of sick children. Every day, children face daunting health challenges, from manageable conditions to rare and complex diseases like Gabriele-de-Vries syndrome, affecting children like Coen.



EDM2 - 9 Sept

Caring for kids like Coen demands extraordinary resources—resources that often exceed available funding. His short of providing the exceptional care these children deserve, let alone fostering research essential for advancing treatments for such complex diseases.

Coen's journey began with diagnosis at just one year old, leading to developmental delays, intellectual hurdles, and a myriad of other challenges that significantly impact his life and that of his family.

Coen does not just need good treatment, but the very best care possible to ensure they live to their fullest. Though Coen faces challenges with mobility now, with your support, we can ensure he receives specialised medical professionals, and transformative therapies, paving the way for him to one day walk independently.

— someone who has already made a difference in the lives of sick children— to ensure your Will for future generations. Your legacy will enable SCHF to continue helping children receive exceptional care and support, always.

With your Will, you have the power to leave an enduring mark on the future of children's health. A thoughtful decision, and to assist you, SCHF has partnered with **Gathered Here**, one of the best in the Will writing services.

With **Gathered Here** at no cost. Through a straightforward, step-by-step process, you can secure a legacy that will shape the landscape of children's health and ensure a legacy that will impact the future of kids' health.

Learn More

By leaving a gift in your Will to SCHF, [visit our website](#) and download our **Ready to Give** form, or contact our **Planned Giving Team** on **1800 770 122** or [visit our website](#).



Sydney Children's Hospitals Foundation



Include a Charity Week

2 - 8 September

A gift in your Will can help shape the future of kids' health

LEARN MORE



Dear Jessica,

Last week, I wrote and shared with you the incredible impact of leaving a gift in your Will to Sydney Children's Hospitals Foundation (SCHF). I introduced you to young Coen, who bravely faces the challenges of Gabriele-de-Vries syndrome. I shared how your decision to leave a gift in your Will can directly support the specialised care and pioneering research essential for children like Coen who are confronting urgent health challenges.

I urge you once again to consider making this visionary gift. It costs nothing now but holds the promise of hope for future generations of sick children.

While *Include a Charity Week* has ended, there is still an opportunity for you to create your free Will online with our partner, **Gathered Here**. Your legacy has the power to shape the future of children's health.

Learn More

Thank you for your thoughtful consideration and ongoing support.

Together, we can continue to provide the very best care and opportunities for all sick children, always.

Anne



Anne McFadden

Director of Planned Giving

Unstoppable Changemaker since 2007

Mail letter (Pack 1)

- Sent to x6k supporters
- Personalised letter, Gathered Here offer, personal information form, reply-paid envelope, fridge magnet



Sydney Children's Hospitals Foundation

INCLUDE A CHARITY

Include a Charity Week
2 - 8 September
A gift in your Will can help shape the future of kids' health
[LEARN MORE](#)

PERSONAL INFORMATION FORM

Thank you for taking the time to update your **Personal Communications Preferences**. Please complete this form (in **BLOCK LETTERS**) and return via the reply-paid envelope provided. Your communication preferences are important to us. All contact information you provide is strictly private and will remain confidential. You can view our privacy policy at www.schf.org.au/privacy-policy

CONTACT & COMMUNICATION DETAILS

Salutation: Mr Mrs Ms Miss Dr Other

Given Name: _____ Family Name: _____

Street Address: _____ Suburb: _____

State: _____ Postcode: _____ Date of Birth: _____

Preferred phone number: _____ Email: _____

Preferred method of contact: *tick all that apply

Mail: Phone: Email:

YOUR PLANNED GIVING PREFERENCES

Gifts in Wills are one of the most valued gifts to SCHF. Knowing that someone has planned for the future of our sickest kids is heart-warming and we are truly grateful. If you have left a gift or are considering leaving a gift in your Will, we would love to know. It is important to SCHF that we keep you up to date and you have the opportunity to see the difference your gift will make in the future.

I have already included SCHF in my Will

I am considering including a gift to SCHF in my Will

Send me an information pack to learn more about leaving a gift to SCHF in my Will

Other: _____

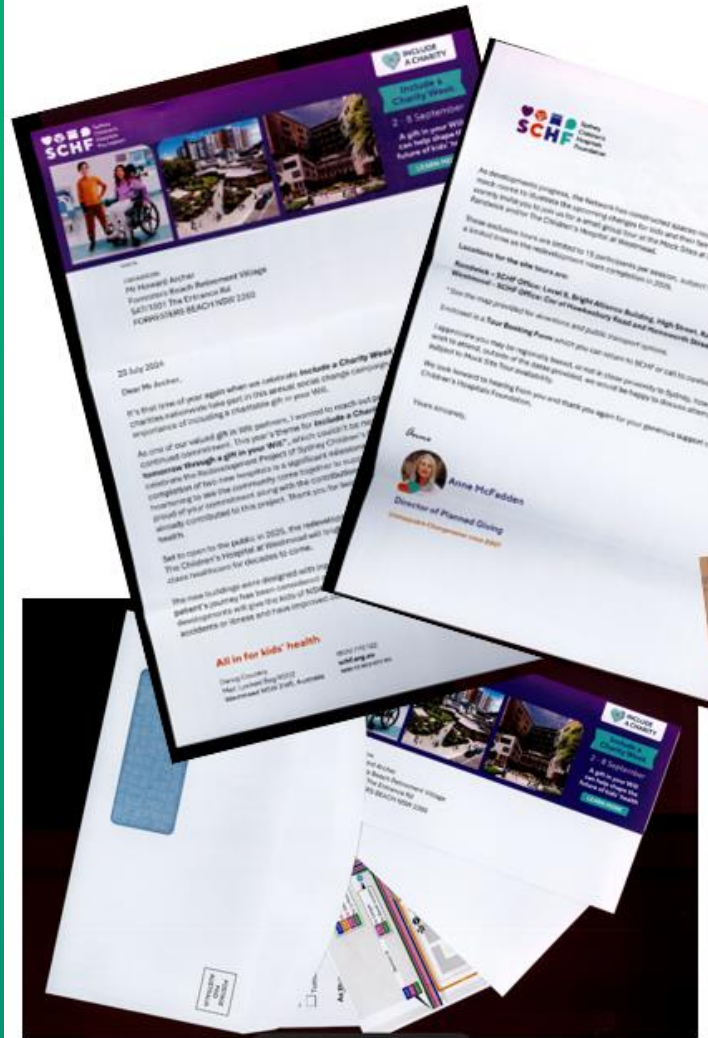
If you would like more information or have any queries, please contact our Planned Giving Team on plannedgiving@schf.org.au or 1800 770 122 or visit www.schf.org.au/gift-in-will

All in for kids' health

Darug Country
Mail Locked Bag 9002
Westmead NSW 2145, Australia

1800 770 122
schf.org.au
ASN 72 003 073 185

Mail letter (Pack 2) - Mock Site Tours



Social Media Paid FB ads

- Best performing **LEAD GEN** ad = Download Enquirer Pack: **x21** out of **x28** leads
- Out-performed previous Lead Gen campaigns due to design + appealing Enquirer pack
- Future SM approach = run **lead gen** ads throughout the year
- Future IAC SM ads to focus on **traffic/Awareness**
- Continue running Search, Paid Google ads as good source of traffic to GH

Best performing LEAD GEN FB ad = 21 out of 28 leads

Sydney Children's Hospitals...
Sponsored · 🌐

When you include a gift in your Will to SCHF, you're investing in both the frontline and future health of kids.

Include a Charity Week (2-8 September) is coming up, and through our online Wills provider Gathered Here, you can write your Will online for free and join our wonderful Movement of Many.

If you're considering writing your Will, download our comprehensive Enquirer Pack to discover how leaving a gift in your Will can contribute to shaping the future generations of kids' health.

Sydney Children's Hospitals Foundation
SCHF

Download our handy Enquirer Pack

DOWNLOAD NOW

INCLUDE A CHARITY

FORM ON FACEBOOK
Download our handy enquirer pack today! [DOWNLOAD](#)

👍 🍷 🥰 36 1 comment

Best performing TRAFFIC FB ad = 2027 clicks

Sydney Children's Hospitals Foundation
Sponsored · 🌐

Even a small 1% gift in your Will to SCHF can significantly impact the future of kids' health.
...See more

Sydney Children's Hospitals Foundation
SCHF

INCLUDE A CHARITY

Include a Charity Week
2 - 8 September
A gift in your Will can help shape the future of kids' health
[LEARN MORE](#)

gatheredhere.com.au
Include a Charity Week [Learn more](#)

KEY LEARNINGS

1. **Audience:** Dataro GIW rank to be key reason for inclusion (high response rate for mail and email)
2. **Social media:** Focus on maintaining **traffic/awareness**
3. **EDM:** Increase engagement and average open rate from **33%**
4. **Mail:** Target donors over 50+, Mosaic Groups C, D, G, Dataro GIW ranking <50k
5. **Paid Google ads:** Continue running as good source of traffic to Online Will pages
6. **Stewardship:** Introduce a 1:1 strategy for supporters with a Dataro GIW ranking <1k that engage with the campaign
7. **Campaign messaging:** focus on patient story, encourage GIW + educate audience on WHY it's important to make a Will
8. **Design:** review assets that could be enhanced with stronger design focus

IAC Week Campaigns

Adam Herodotus, Head of Partnerships, Gathered Here



Gifts & Online Wills during IAC Week





Free online wills



Custom-branded wills



Gift management software



Bequestor acquisition



Legal & probate services





Adam Herodotus

Head of Partnerships

Adam@GatheredHere.com.au



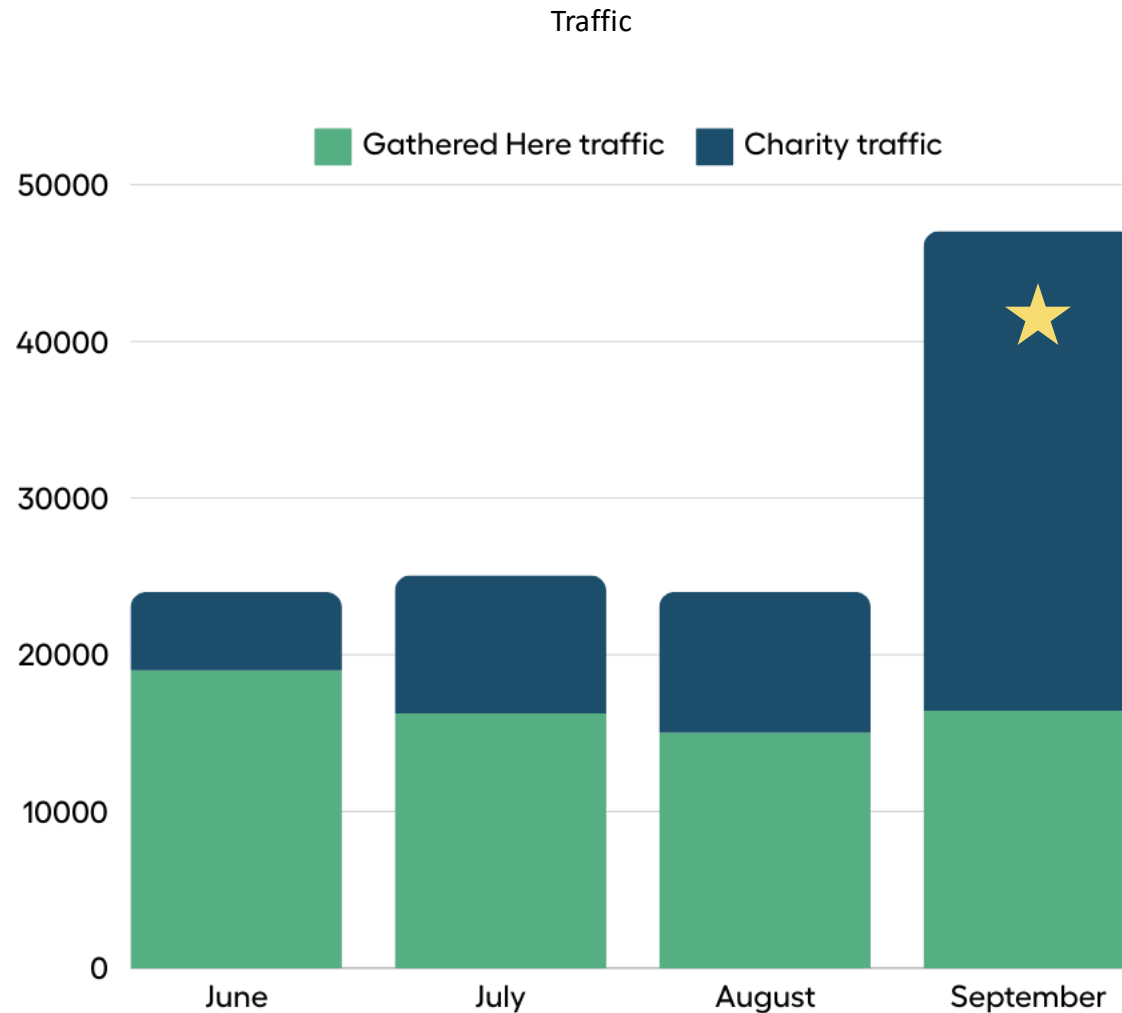
Guide
Dogs.

DIALOGUE
IN THE
DARK™



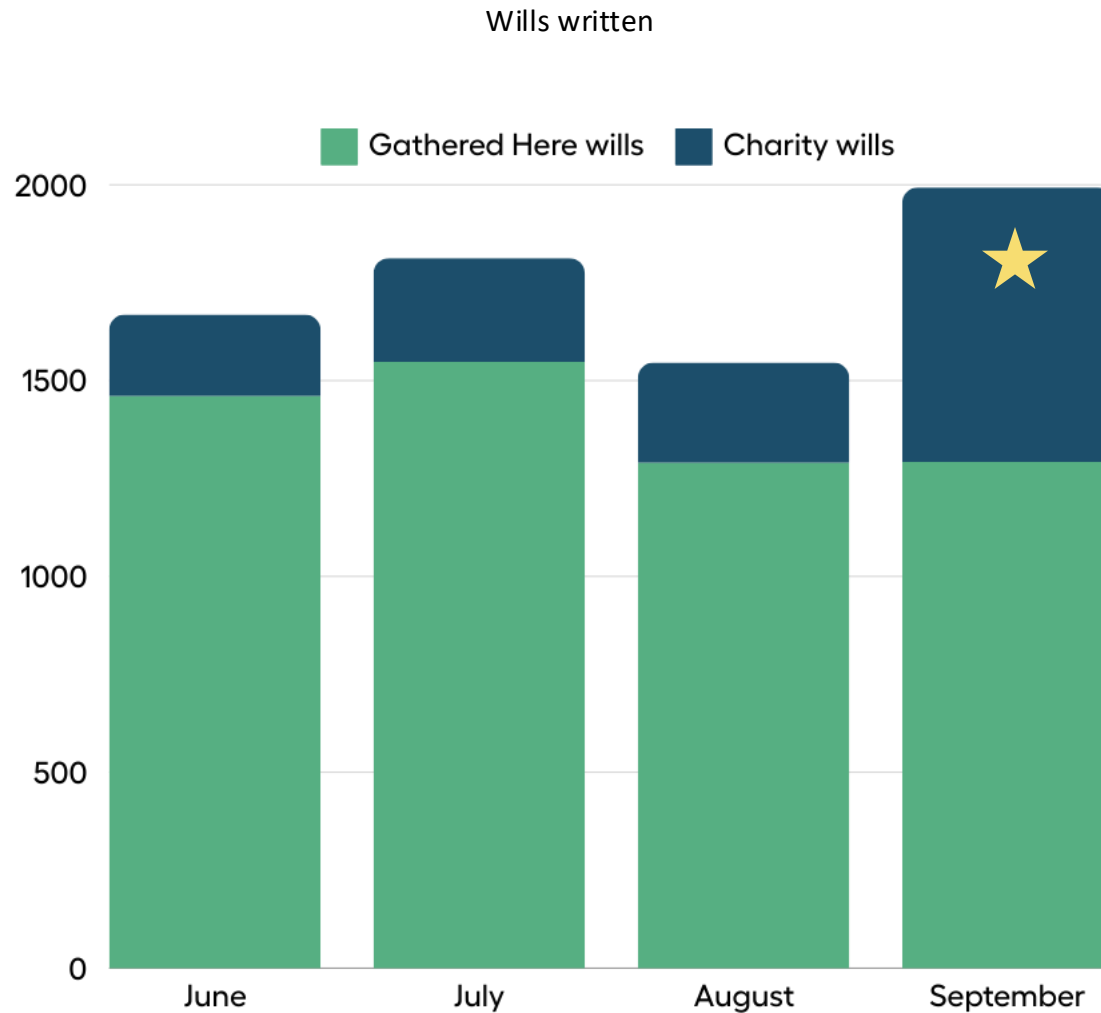
512%

jump in charity traffic from
June to September



237%

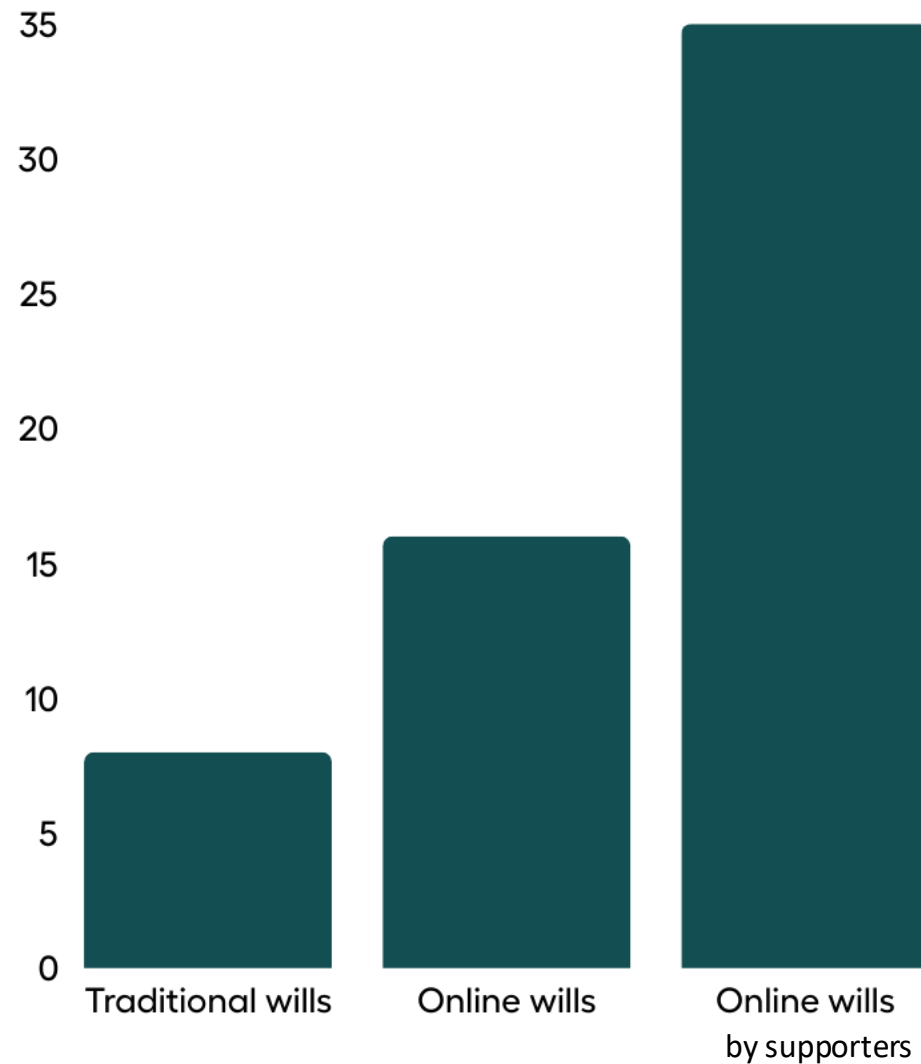
jump in charity wills from
June to September



2.7

gifts per gifter, on average

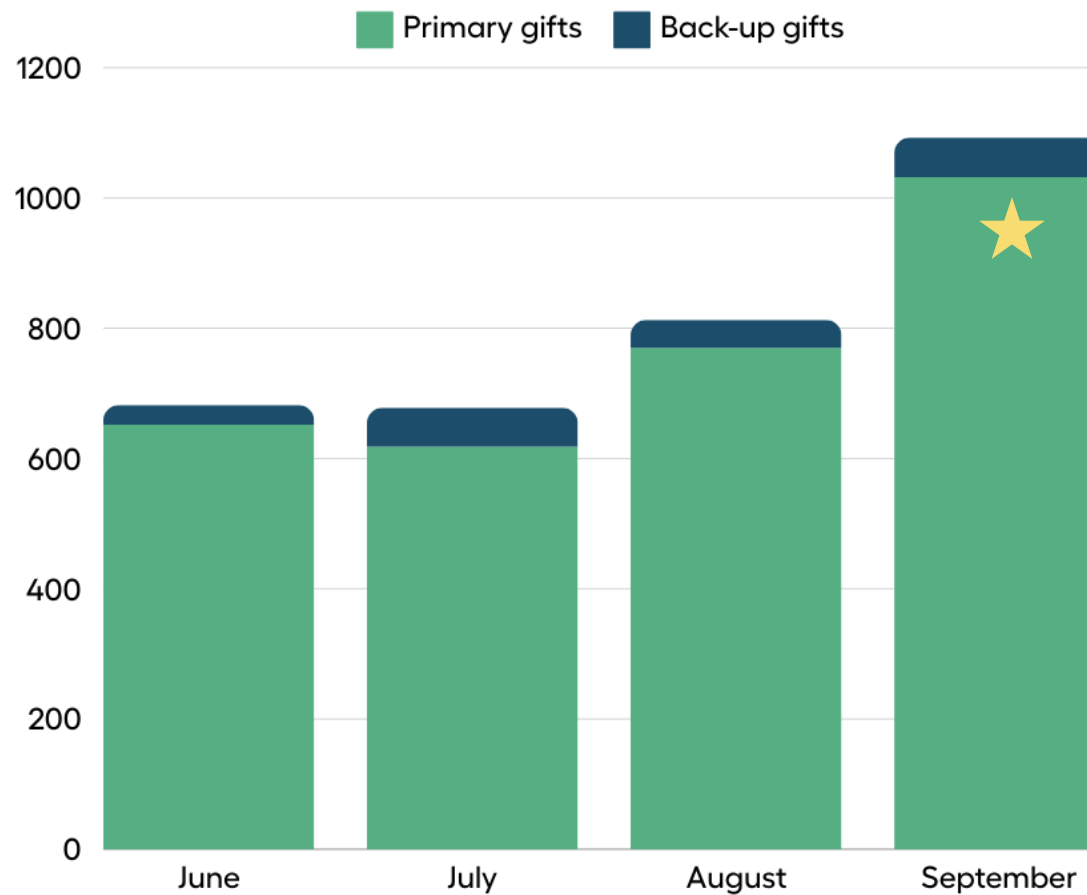
Giving rate by %



58%

increase in primary gifts
from June to September

Total number of gifts



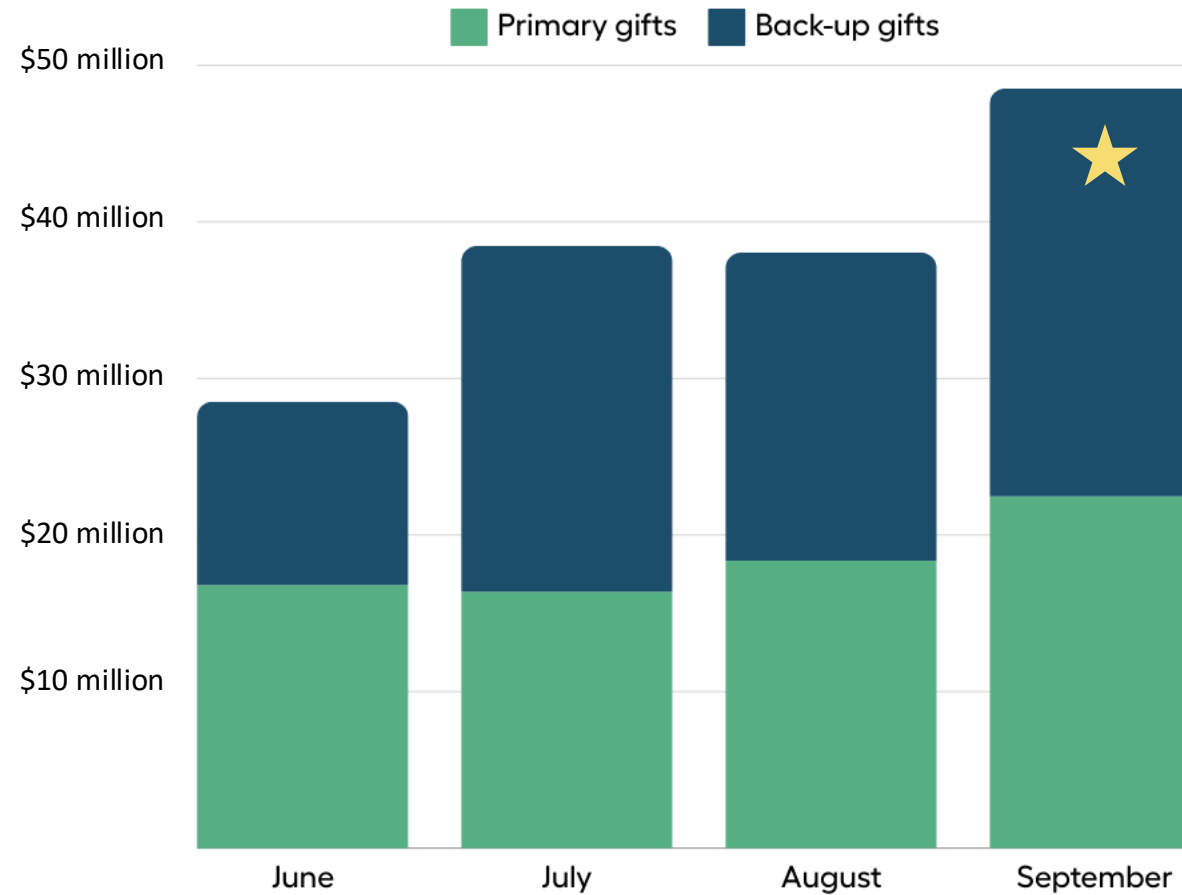
34%

increase in primary gift value
from June to September

70%

increase in total gift value from
June to September

Total value of gifts



Your efforts are working



The Big Legal Questions:
Answered



 REGISTER NOW

Other Examples

Be the spark...
Brighten tomorrow through a gift in your Will

INCLUDE A CHARITY

Include a Charity Week 2-8 September 2024

FIA Fundraising Institute Australia
The Professional Body for Australian Fundraising

BaptistCare

Member of
INCLUDE A CHARITY
the social change campaign
for Australian Gifts in Wills giving

Include a Charity week
2-8 September 2024

Because we care

Be the spark
brighten tomorrow through a gift in your Will
2-8 September 2024

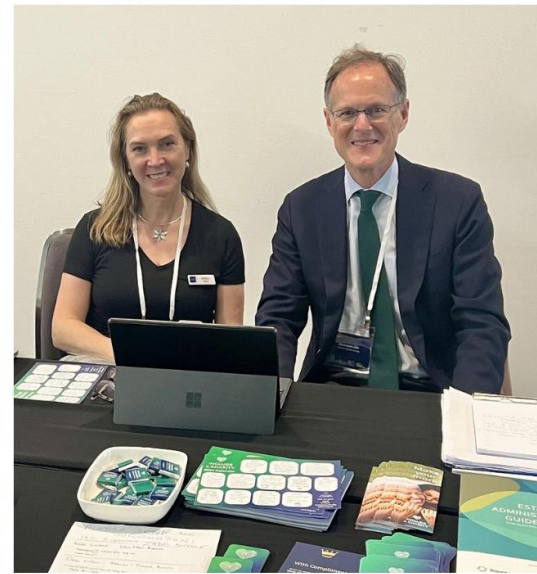
INCLUDE A CHARITY

San Foundation

IAC Week Roadshow — September 2-10



IAC Week Roadshow — September 2-10



Troubleshooting session: General Challenges and Successes

- Share any comments or questions in the Chat or Raise Hand
- Breakout discussion groups and feedback

INCLUDE A CHARITY TRAINING DAY

Achieving Cut Through:

Layering Marketing for
Impact and Results



20 November 2024



Stroke Foundation,
Level 7, 461 Bourke Street,
Melbourne VIC 3000

Speakers:

- Frances Schepisi, National Manager at Stroke Foundation
- Jakki Travers, Associate Director, Children's Medical Research Institute
- Bethan Hazell, Acting Head of Fundraising at Peter MacCallum Cancer Foundation
- Jeremy Bennett, Director and Chief Consultant at Bigfoot Fundraising



INCLUDE
A CHARITY