

2024 Member Survey

Responses: 68



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Our Approach

Survey Approach:

- Conducted with **68 respondents**, reflecting a **100% increase** (34 more responses compared to last year).
- Participants included a broad cross-section of IAC members, ensuring diverse insights.

Report Focus:

1. Impact and Purpose of IAC

Highlighting how IAC supports the sector through training, networking, and advocacy.

2. Deep Dive into IAC Week

Evaluating the impact and engagement levels of IAC Week initiatives.

3. Legal and Policy Campaigns

Reviewing the role of IAC in driving legislative and sector changes for Gifts in Wills.

4. Engagement with IAC

Exploring how members engage with IAC events, resources, and campaigns.



What did we learn in 2023 Member Survey?

Triumphs:

Empowering the Sector through Knowledge and Expertise

Fostering Collaboration and a Stronger Collective Voice

Elevating Awareness and Advocacy for Gifts in Wills

Opportunities:

Strengthening Measurement and Impact Assessment

Resource Accessibility and Co-Branding Ease

Strengthening Messaging and Awareness in Community and Solicitors

Training and Development

"The training is excellent, and collaboration is very important to energise us."

Networking and Collaboration

"It was nice to attend multiple training days and webinars to learn from our peers"

Advocacy and Industry Impact

"IAC membership allows charities to have a united approach to the promotion of gift in Wills"

Event Quality and Accessibility

"Excellent quality and in-depth training with giW specialists!"

Access to Resources

"Invaluable information from reports"

Value for Money

"The IAC conference alone provides value for money. All additional training days plus 1:1 support and resources are a big bonus."

What members are saying...



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Include a Charity Purpose and Impact



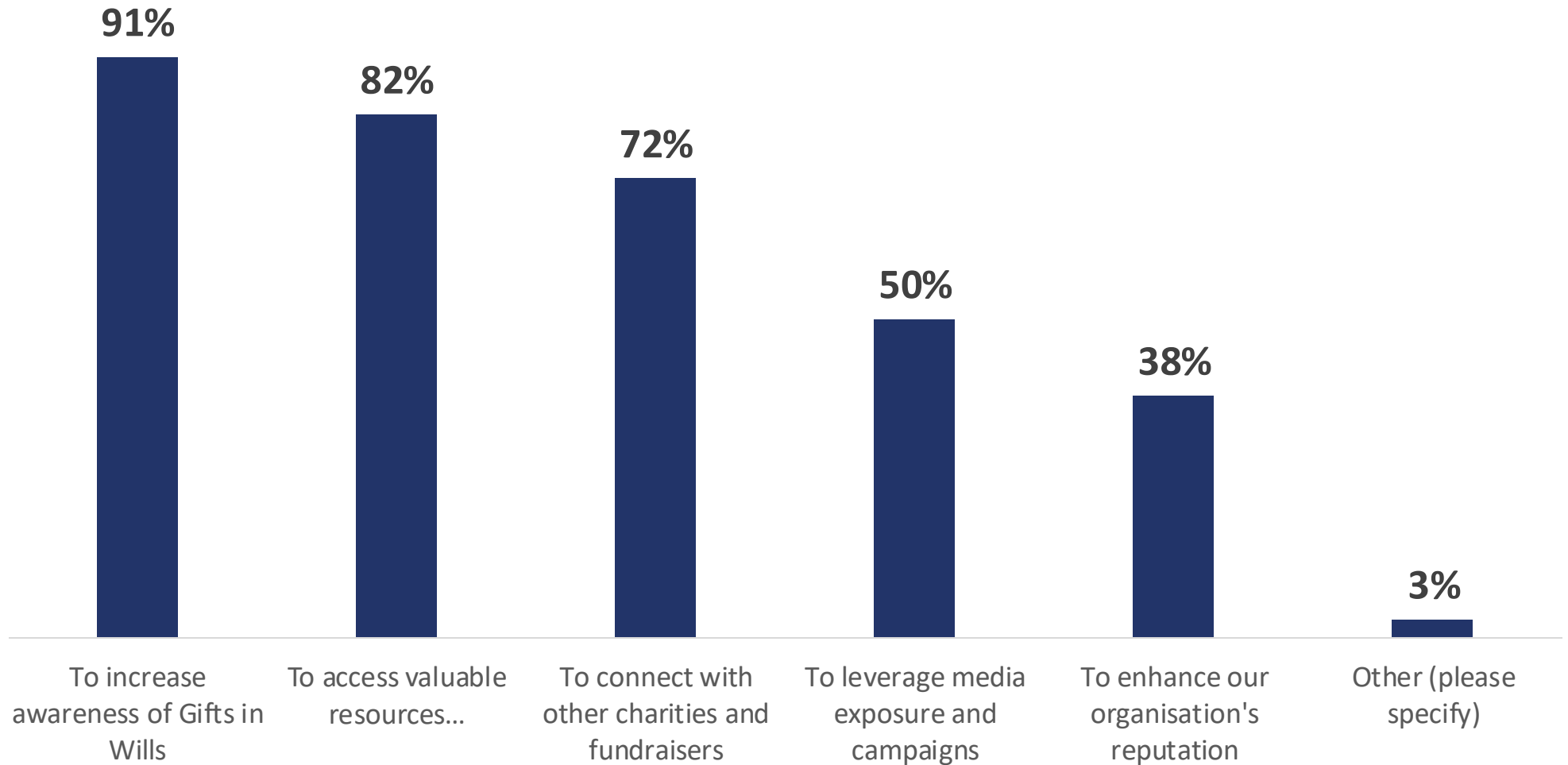
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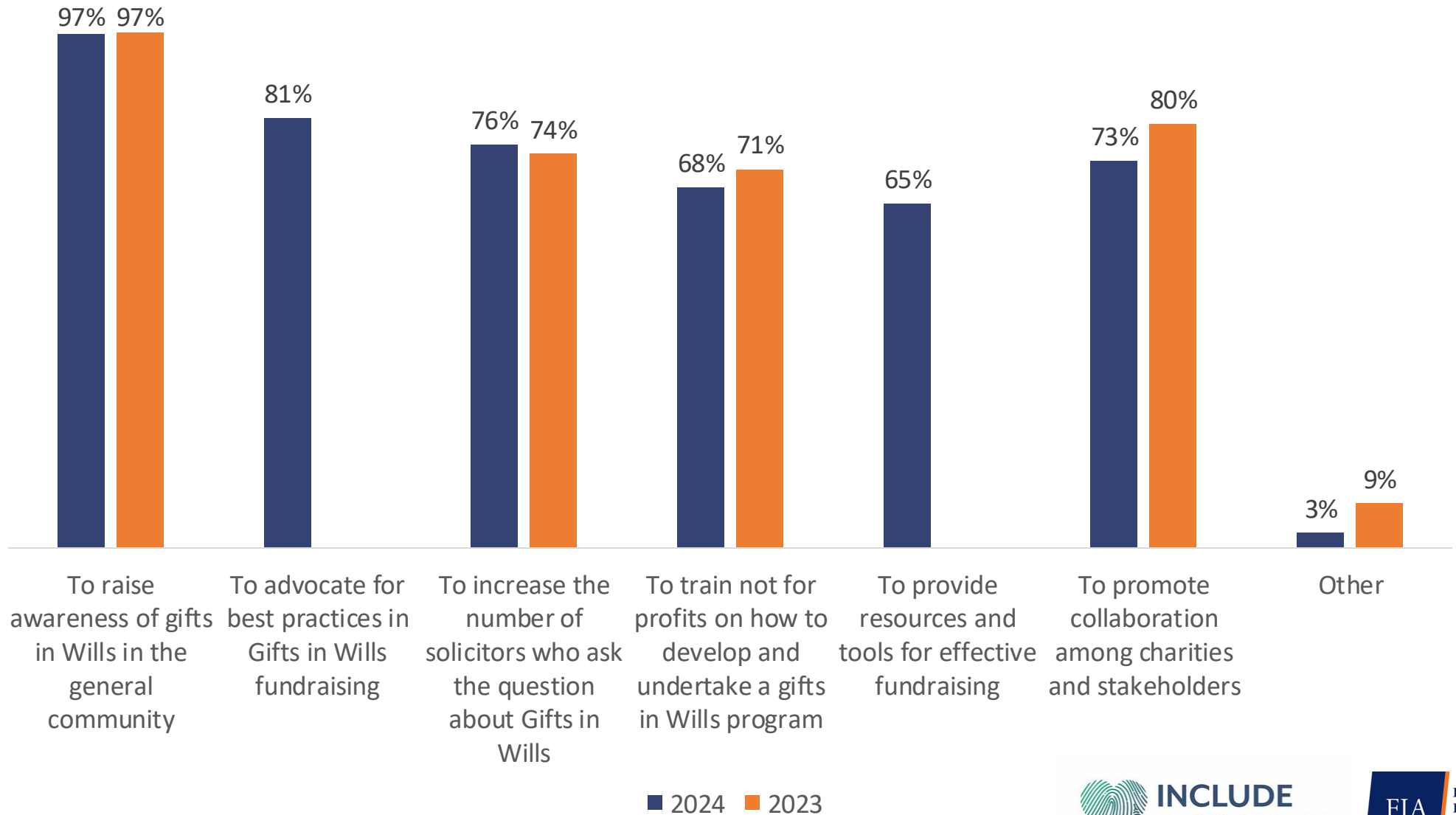
Purpose of IAC

Why is your organisation part of Include a Charity Campaign?
Select all that apply.

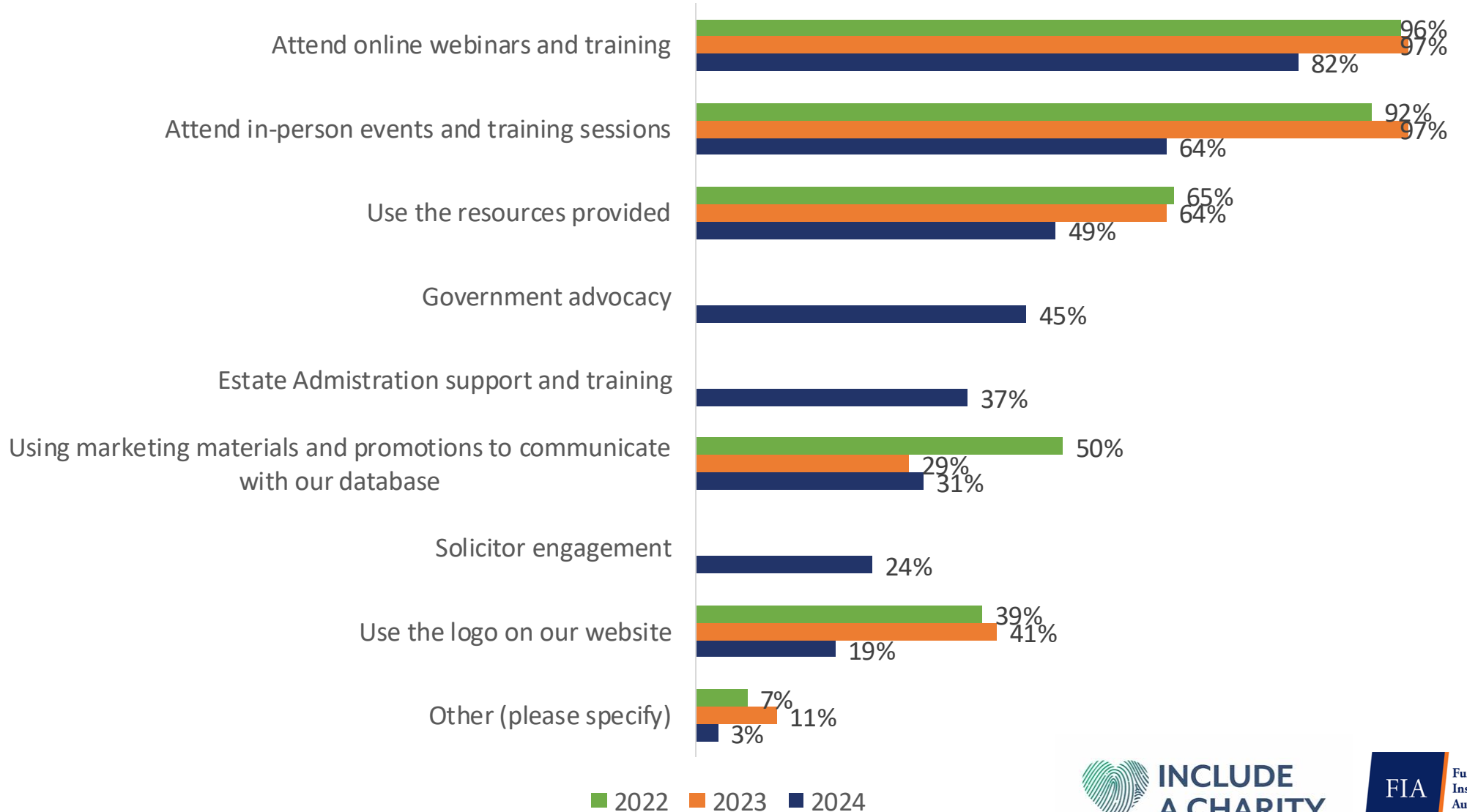


Purpose of IAC

What do you think the purpose of Include a Charity should be? Select all that apply.

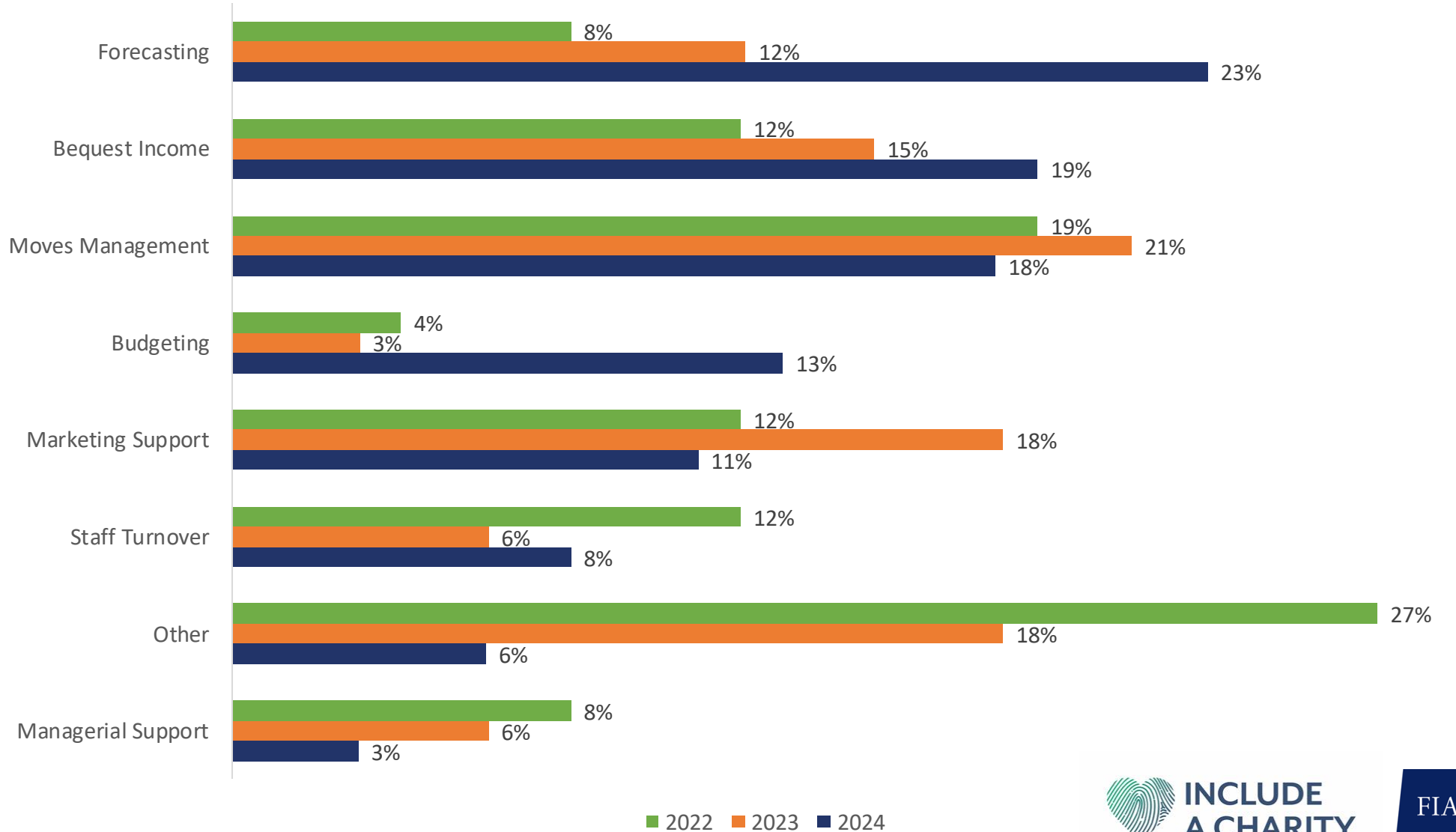


What do you value most about Include a Charity? Select all that apply.



Concerns

What are the main concerns of your Gift in Wills program within your organisation? Select all that apply.



Key Insights

Unified Commitment to Gifts in Wills

Members consistently value IAC for its ability to bring the sector together, providing resources, training, and advocacy to elevate GiW programs.

Addressing Strategic Challenges for Growth

Forecasting and budgeting have emerged as key focus areas for 2024, reflecting a proactive shift toward sustainable program planning.

High Engagement with Room for Customisation

Members engage through training, events, and webinars, recognising their value in building expertise.

There is an opportunity to increase uptake of marketing materials by enhancing customisation options.

What did we learn?



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Include a Charity Week Deep Dive

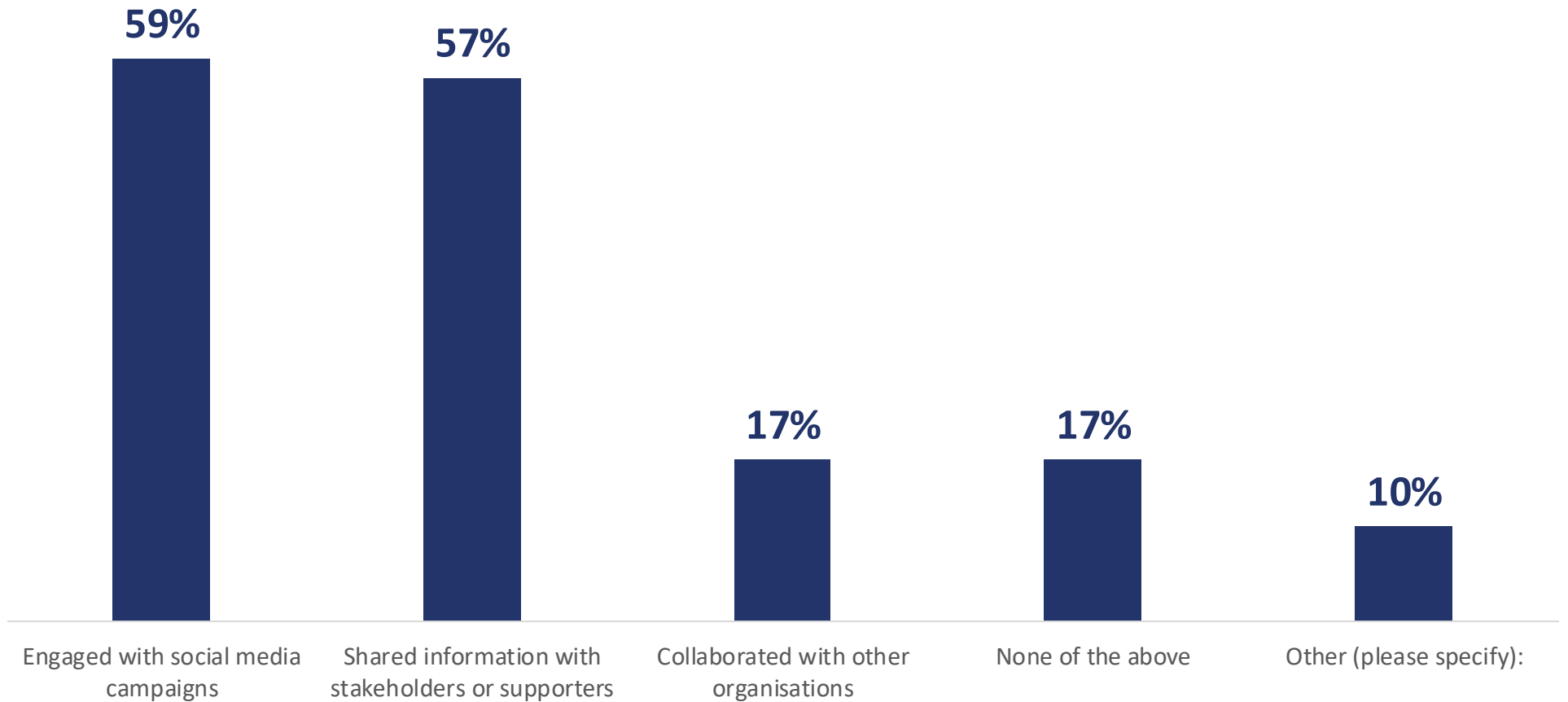


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Please share details of your involvement with IAC Week 2024.
Select all that apply.



**How does IAC
Week boost
your Gifts in
Wills program?
Please rank.**



	Average Ranking
Increases awareness of our GiW program	2.2
Drives engagement with potential donors	3.5
Enhances visibility through media coverage	4
Fosters discussions around Gifts in Wills with stakeholders	4.1
Provides valuable marketing materials and resources	4.9
Encourages collaboration with other organisations	5.3
Generates new leads and inquiries about GiWs to your organisation	5.8
Boosts participation in our events and webinars	6.5
Other	8.8



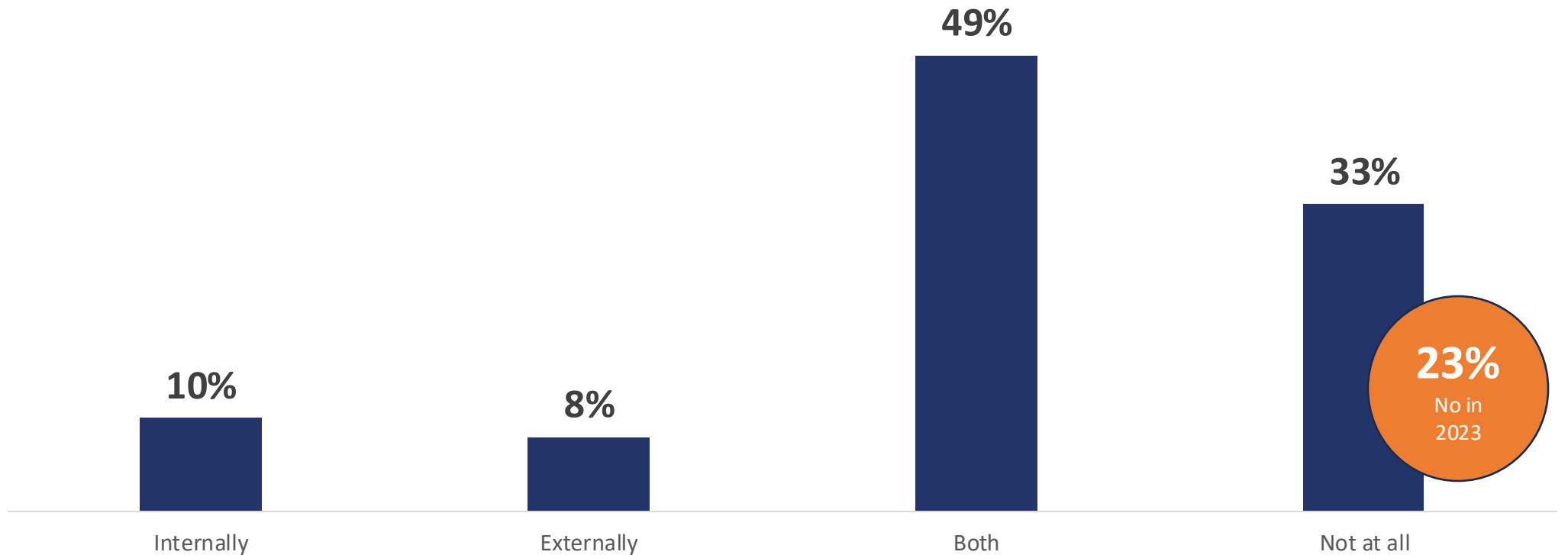
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From 2022 to 2023, we saw a 54% increase in the use of Include a Charity Week messaging.

Did you utilise the IAC Week messaging during this time in 2024?



Please rank
your
preference for
the following
media assets:



	Average Ranking
Downloadable Guide	2.3
Graphics digital tiles and banners	3.2
Videos	3.4
Editable eDM Copy	3.7



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Customisation Needs:

Many organisations emphasise the need for flexibility to customise assets to align with their own branding, messaging, and target audiences.

Timely Access and Advance Preparation:

There is a need for assets to be provided well in advance to allow for adequate planning and integration into campaigns.

Resource Constraints:

Limited internal resources, such as staff capacity or competing priorities (e.g., National Health Week), restrict the ability to fully utilise the provided assets.

What members are saying...



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Which channels achieved the best supporter engagement?

Please rank.



	Average Ranking
Social media	2.3
Email	2.6
Telephone	3.2
Website	3.5
Direct Mail	4.1
Other	5.4



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Success of Include a Charity Week

Did media coverage increase your profile over IAC Week?

28%
YES

24%
NO

48%
SOMEWHAT

Did you have support from your marketing team?

50%
YES

15%
NO

20%
SOMEWHAT

Did you run social media over IAC week?

70%
YES

21%
NO

9%
PLAN TO NEXT YEAR

Success of Include a Charity Week

Please state your lead time for planning for IAC Week

13%
1 Month

45%
3 Months

27%
6+ Months

Did you receive more digital coverage to your website for IAC Week?

70%
YES

30%
NO

Did you generate leads for IAC Week?

71%
YES

29%
NO

What will you share with your managers?



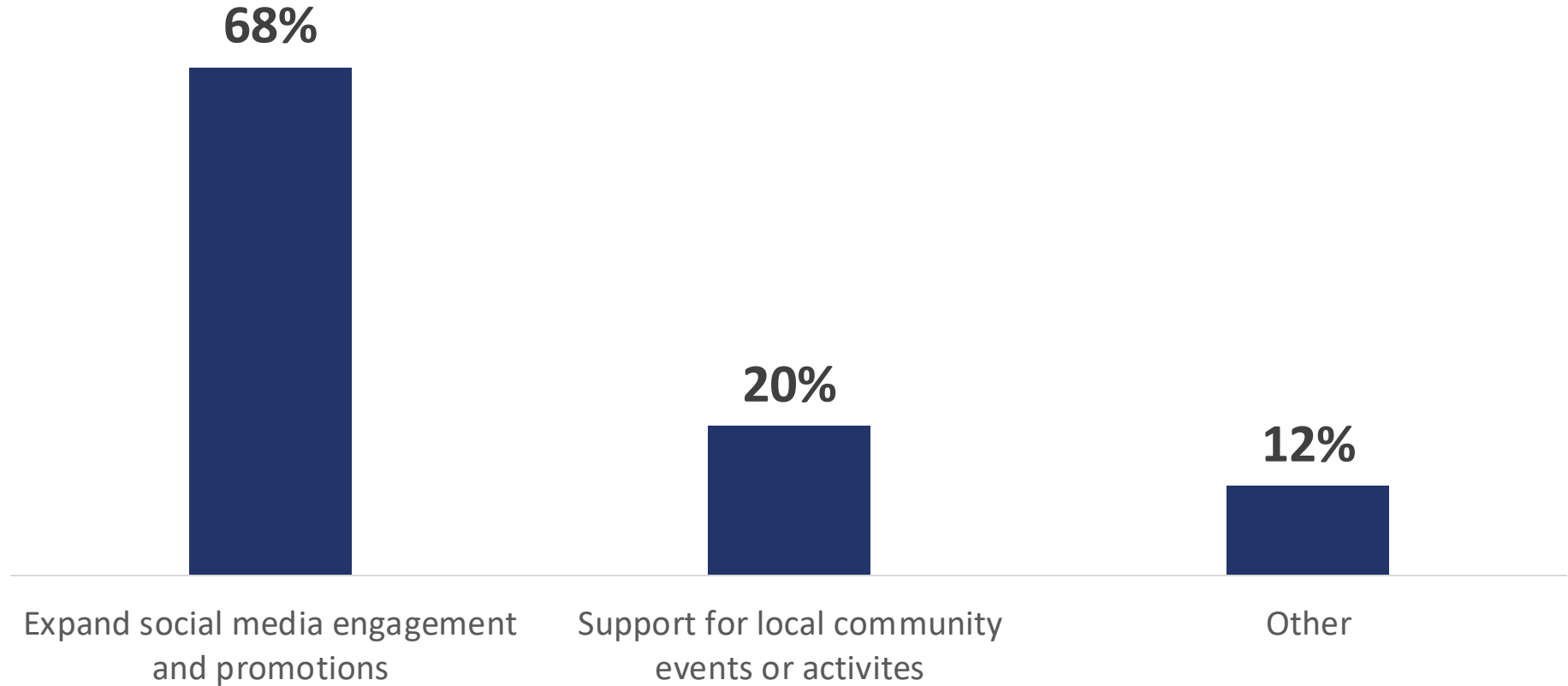
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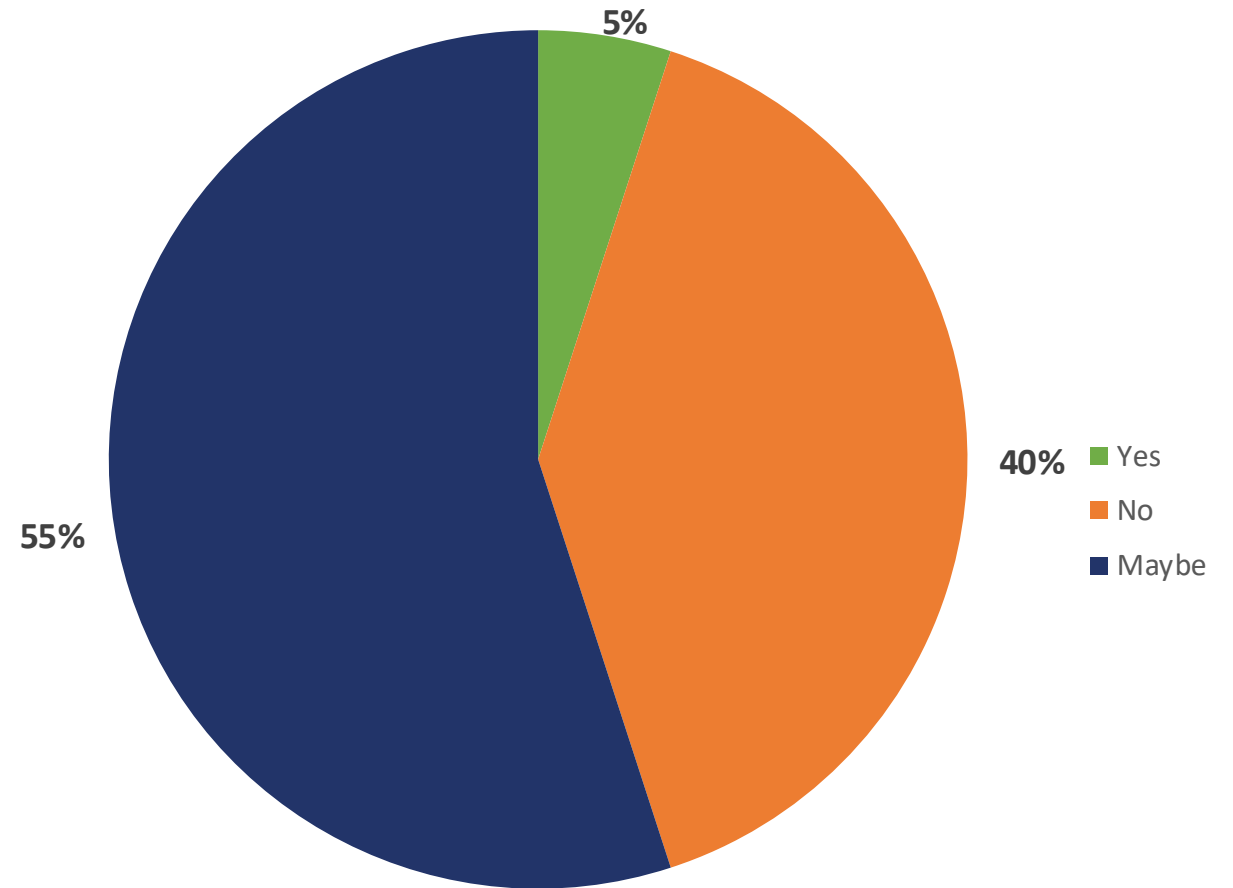
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How else would you suggest maximising your involvement in IAC Week?



Would your organisation be open to contributing an additional budget towards a collective TV advertising fund?



**Growing
Reach of IAC**

Key Insights

Driving Lead Generation and Awareness

With 71% of members generating leads during IAC Week 2024, the initiative is proving to be a powerful tool.

Social media was a standout channel, used by 70% of members, reinforcing its importance in campaign strategies.

Opportunities to Strengthen Internal Alignment

While 70% of organisations saw increased digital coverage on their websites during IAC Week, only 50% received support from their marketing teams.

Strengthening internal buy-in and alignment could help more organisations fully capitalise on the campaign's potential.

Expanding Channels and Clarifying Collective Efforts

Members are keen to expand their use of social media and digital channels to boost IAC Week's impact, but there is no clear consensus on collective advertising like TV.

Exploring opportunities, such as shared budgets or coordinated campaigns, could amplify the campaign's reach.

What did we learn?



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Policy and Advocacy



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Please rank the following components of the IAC Legal Legends campaign (solicitor/wealth advisor program) in order of importance:



	Average Ranking
Include a Charity being involved in legal practitioner events	1.8
Creating solicitor assets for Include a Charity Week	2.1
Devising and delivering gifts in Wills training modules	2.1

Please rank the following components of the IAC Policy & Advocacy campaign in order of importance:



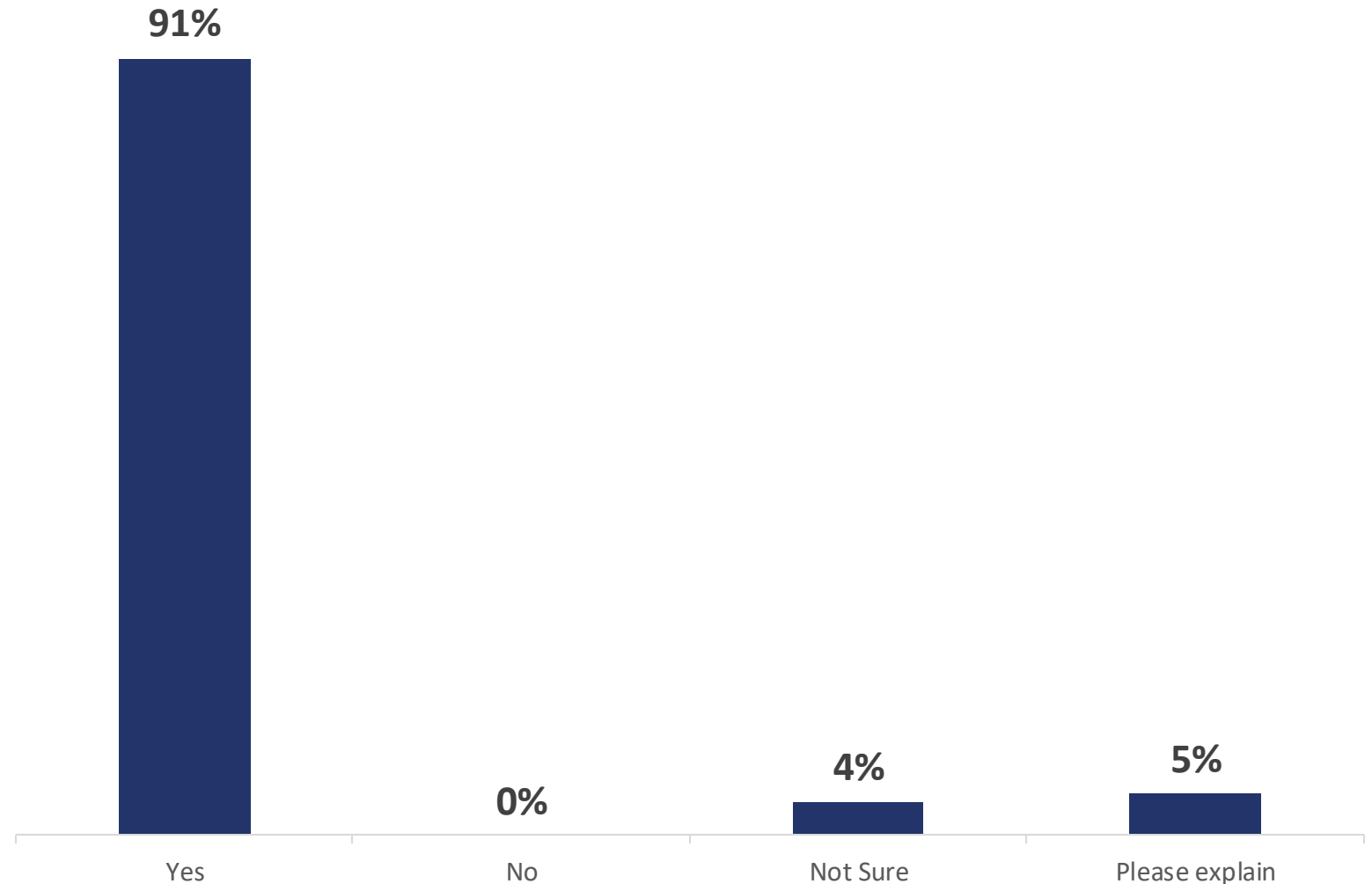
	Average Ranking
Superannuation reform to allow for charitable gift inclusion	2.2
Creation of a National Will Register	2.4
Probate reform for improved Will execution	3.1
Capital Gains Tax education for estate administrators	3.5
Harmonisation of probate offices nationally	3.8

Engagement



We now drive traffic to your personal IAC web page through our social media campaigns and provide metrics and results to members.

Would you like to see more campaigns of this kind?



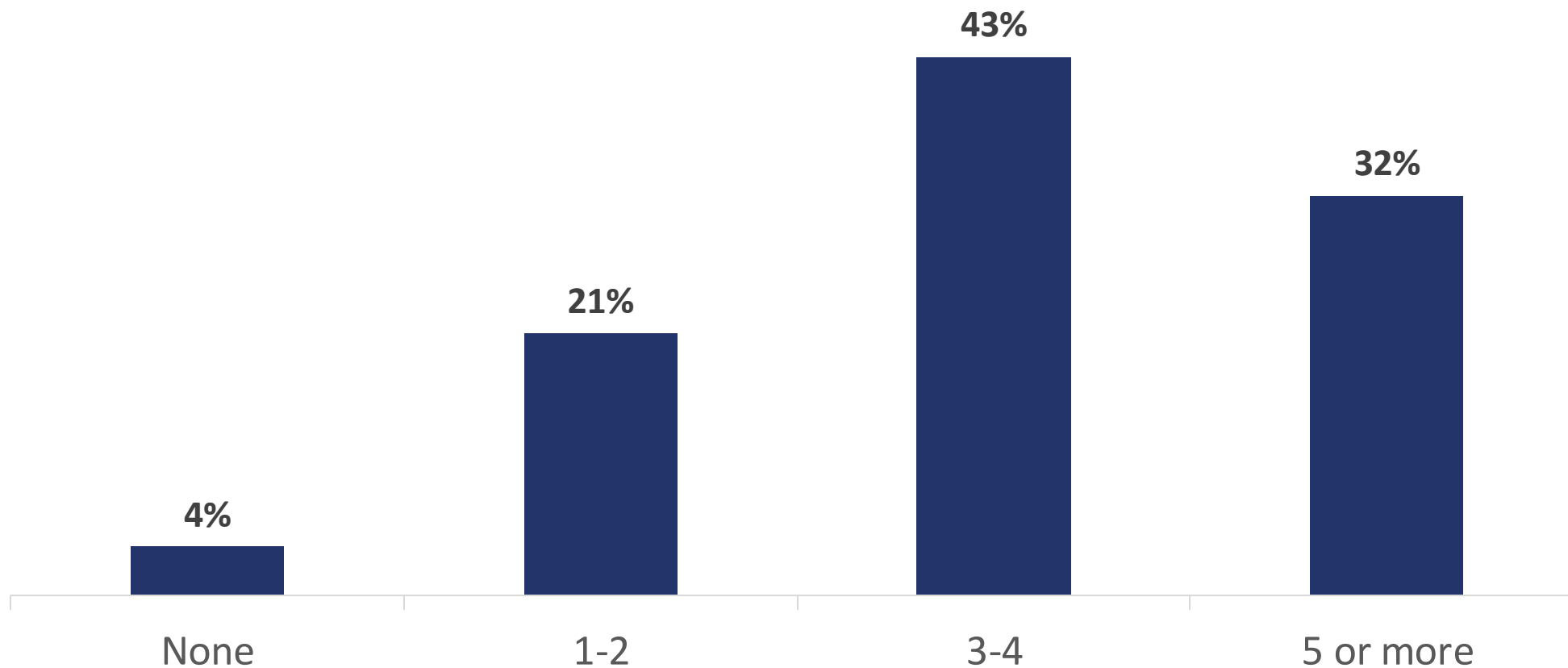
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How many IAC training days, events and webinars did you attend this year?



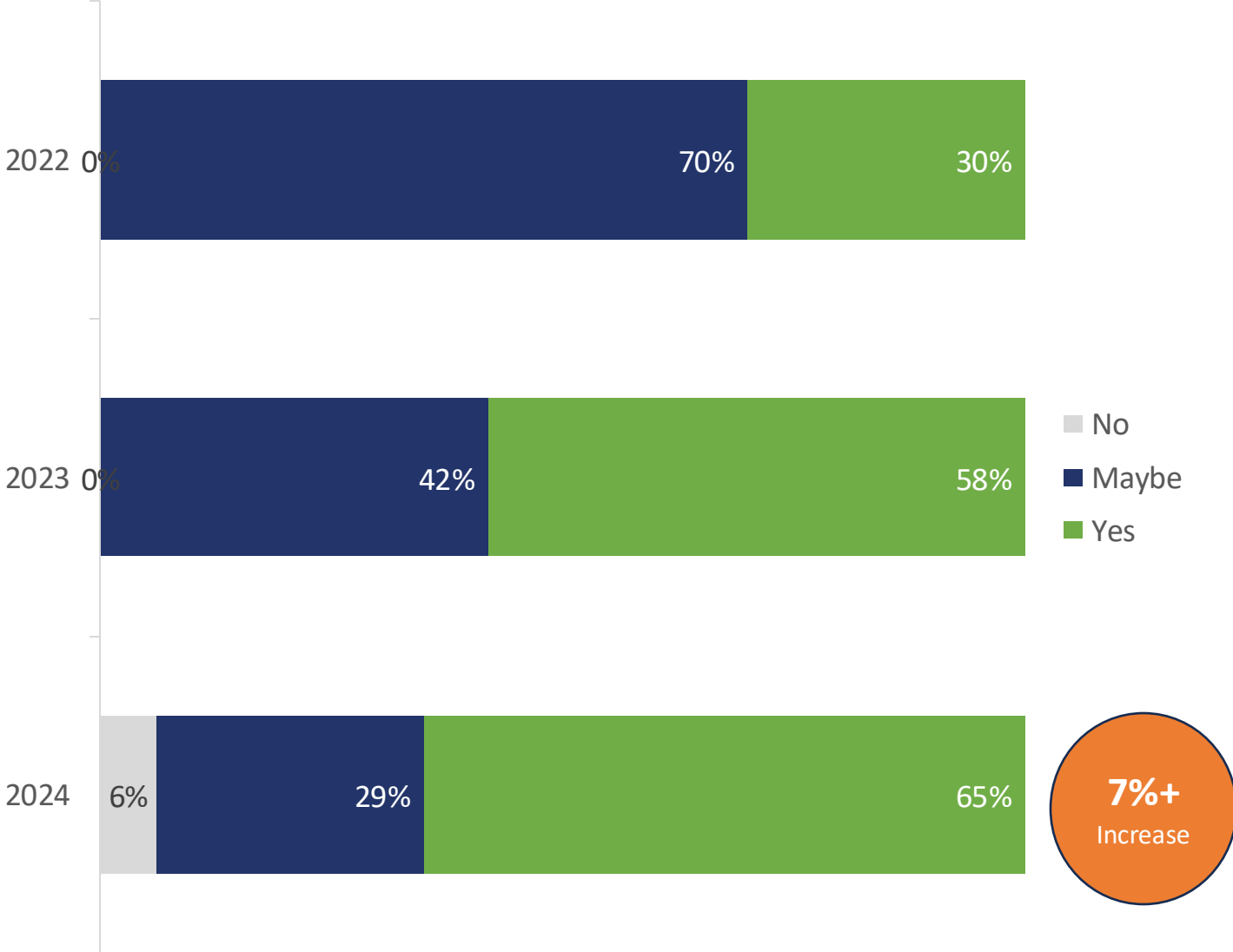
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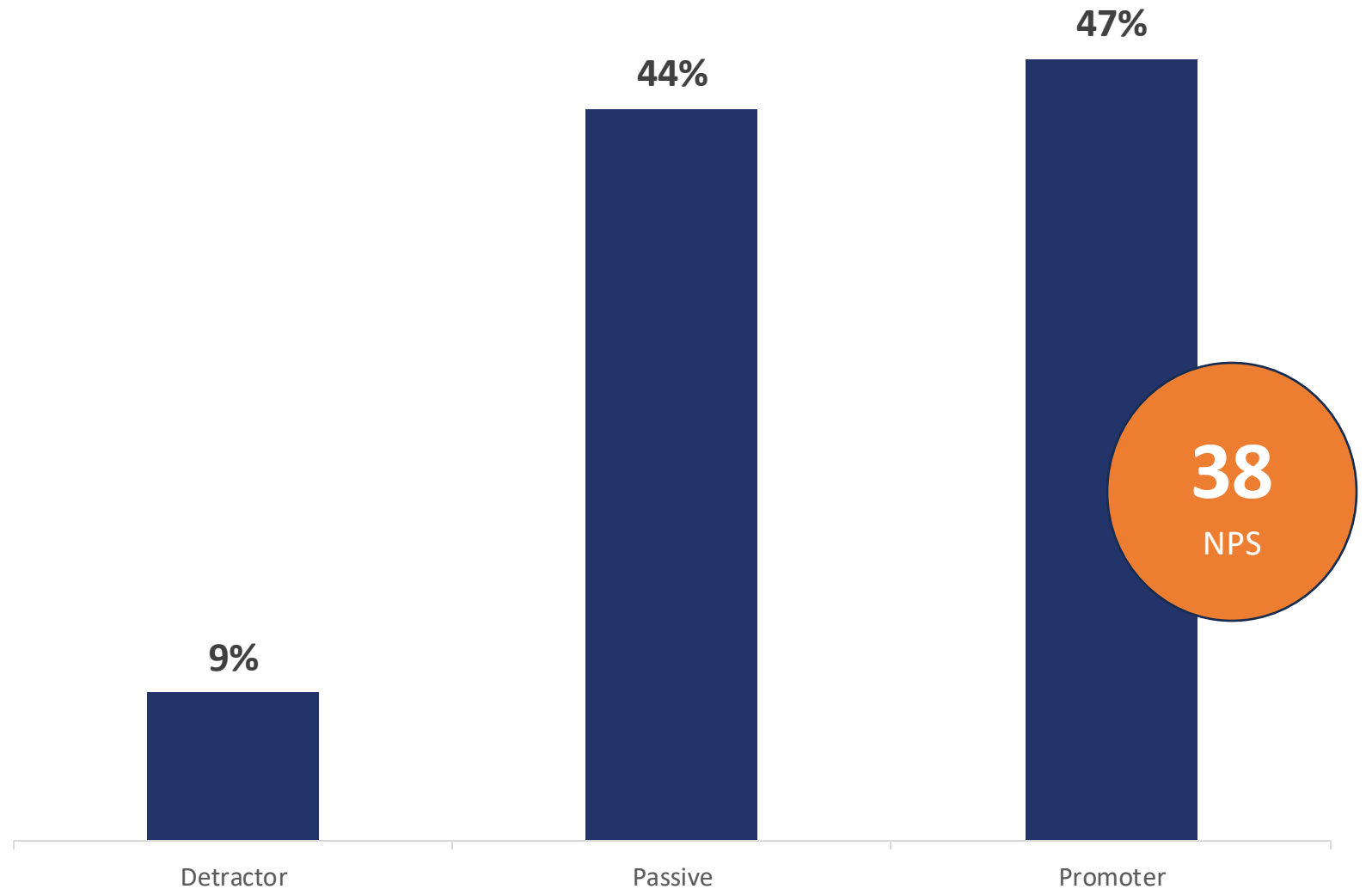
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Do you receive value for money from the Include a Charity campaign?



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**NPS:
Would you
recommend
IAC
membership to
another
organisation?**



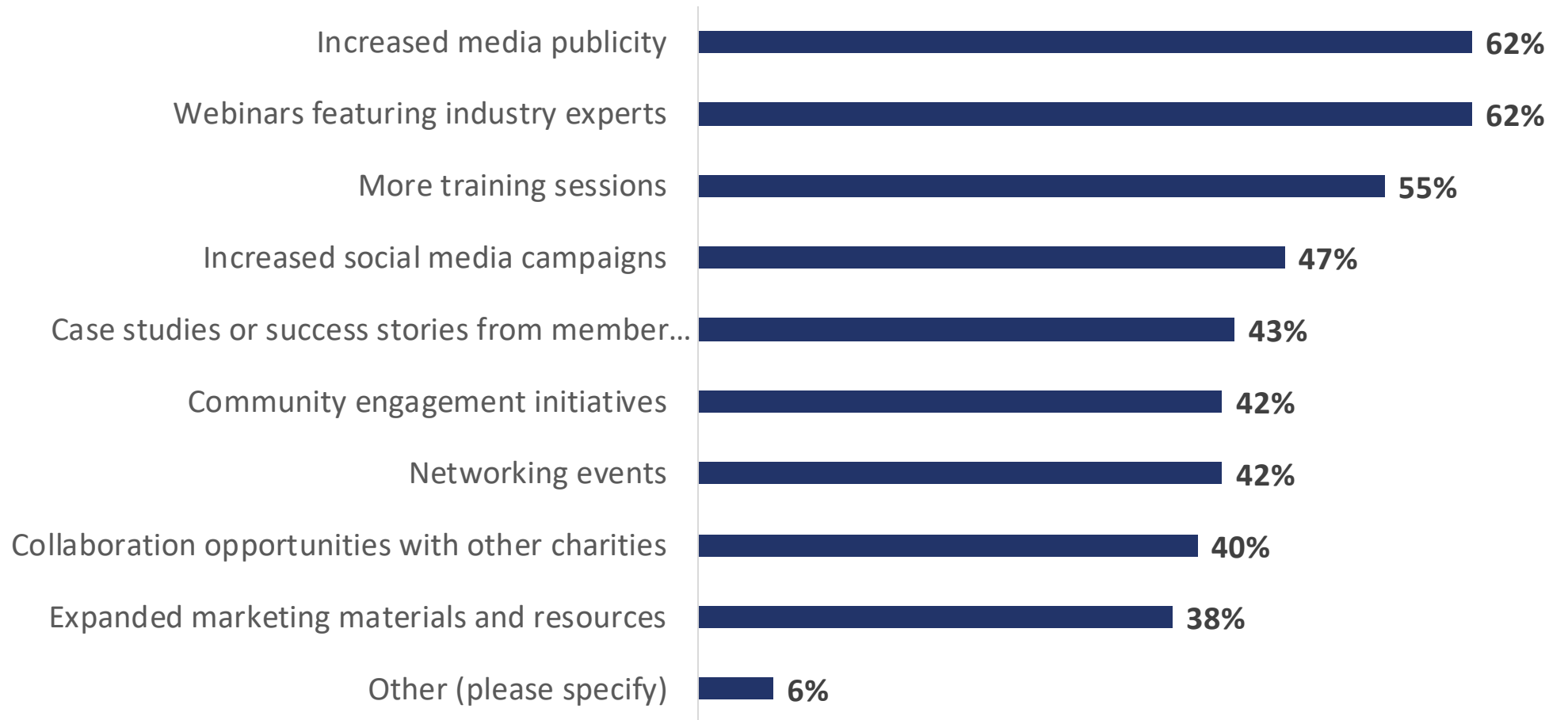
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What additional activities would you like to see from the Include a Charity campaign? Select all that apply.



Please rank the following topics for IAC Conference:



	Average Ranking
Stewardship	2.7
Acquisition	2.7
Research	2.8
Marketing	3.7
Estate Planning	4.8
Estate Administration	5.4
Human Interest	6.0
Other	7.8



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Key Insights

Active Participation Across IAC Events

Members continue to engage heavily with IAC's offerings, with the majority attending training days, webinars, and events.

This highlights the ongoing value placed on IAC as a hub for professional development and sector-wide learning.

Improved Acknowledgment of Value for Money

Perceived value for money has seen an increase.

This reflects the growing recognition of the benefits provided through IAC membership, such as resources, advocacy, and tailored support.

Opportunities to Personalise Engagement

While overall engagement is strong, there's room to explore more personalised offerings, particularly for smaller charities.

Tailored initiatives and expanded resource flexibility could enhance participation and address specific needs across diverse organisations.

What did we learn?



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Key Insights



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Triumphs



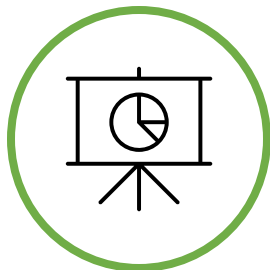
Clear Alignment on the Purpose of IAC

Members are strongly aligned on IAC's mission to increase awareness of Gifts in Wills, foster collaboration, and provide professional development. This unity highlights the campaign's relevance and importance across the sector.



A Strong and Engaged Community

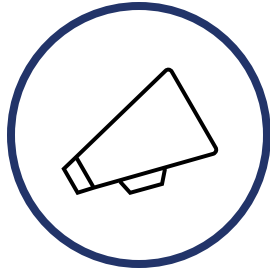
The IAC community remains highly active, with members valuing the networking, training, and collaboration opportunities. High participation in IAC Week, webinars, and events underscores the campaign's ability to energise and connect the sector.



Clearer Measurement of Impact

Progress has been made in measuring the effectiveness of IAC activities, with 71% of members generating leads during IAC Week and an increased focus on tracking engagement across digital and social platforms.

Opportunities



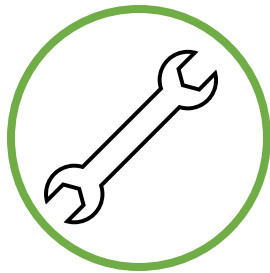
Amplifying Collective Awareness and Impact

Building on the success of IAC Week, there's an opportunity to further increase sector-wide visibility and impact through expanded campaigns and collective initiatives. Collaborative advertising, like shared digital or TV campaigns, could strengthen the collective voice.



Growing Legal and Financial Advisor Networks

Strengthening relationships with solicitors and advisors remains a key area for growth. Expanding engagement through targeted campaigns, professional education, and advocacy can help normalise the GiW conversation in legal settings.



Enhancing Resources for Diverse Needs

Continuing to refine and customise resources ensures they remain adaptable for organisations of all sizes. Tailoring support for small, medium, and large charities will maximise the utility and impact of IAC's tools.

**Thank you for being part
of a movement**

www.includeacharity.com.au



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