



**INCLUDE
A CHARITY**
Make your mark

Include a Charity Campaign Strategy 2024

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Include a Charity 2024 Strategy

Purpose and Strategic Intent

The strategy for Include a Charity is reviewed and revised each year. The 2024 strategy enlarges the scope and scale of the campaign's core purposes:

- 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 and promotion of member bequest programs and the aspirations of the IAC campaign.
- To advocate for operational and legislative change with government to smooth channels for growth in bequest fundraising in Australia.
- To encourage estate planning professionals and influencers to reference gifts in Wills during the will-writing phase or in public forums to grow and support campaign objectives.

Campaign Objectives 2024



Aims and activities

1. Increase public awareness of gifts in Wills as a philanthropic act to make it as commonly recognised and enacted as all other fundraising products.

Build on Year Round PR and Marketing



Measurable monthly output January to December - marketing, publicity and exposure to the Include a Charity brand through social media, blog posts, print media articles, podcasts, online portals, state Expos & driving traffic to the IAC website.

Consistent social media campaigns and activity through target audiences.

More broadcast exposure - radio advertising, Spotify, DRTV

Develop dynamic IAC Week output and engagement through collaborations with creatives and member requirements.



Collaborating with IAC members for creative and testimonial output - in copy, graphics and video format. Enhance production and use of assets, for internal and external audiences. Encourage bold use of IAC Member logo on members' online and collateral output.



Continue to drive marketing exposure and policy influence through the Wills & Legal Task Force and its sub committees. Share the metrics, actions and results across the IAC member base to highlight audience reach.



Redevelop and promote the IAC website through media channels to educate and make it easier for Australians who are considering, or deciding, to leave a gift in their Will to fulfil their wishes.

2. i) To develop the knowledge, experience and skills of the gifts in Wills fundraising sector in Australia to ensure best practice fundraising and promotion of the campaign. ii) To build on this by growing the membership base of Include a Charity.

Training and Professional Development



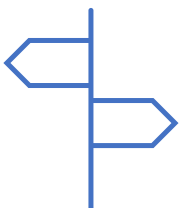
Delivering training days, webinars (with partner organisations), more discussion forums, networking events and activities which facilitate knowledge sharing among IAC members and the fundraising community. Topics such as Moves Management, Diversity & Inclusion, CRM Best Practice, Stewardship, Overseas Estate Administration.



Personalised and individualised connections with members through State Check-In events and one-to-one meetings.

Tailor some activities and output to cater for both large and smaller organisations, and in varying charitable genres.

Build community in the GiW sector through activities, events, webinars and thought-leadership articles and PR to deliver a united and connected campaign.



Delivering a content-rich and successful **One-day Virtual Conference** in July and **IAC Week Roadshow** in September for IAC members and paying attendees.

Offering fresh ideas, informative speakers and electives for Advanced and New GiW program members.



Supporting advanced best-practice knowledge around the channel of gifts in Wills fundraising and administration. Conduct a yearly supporter survey to inform strategy and ensure Include a Charity meets the needs of and delivers value to IAC members.



Work with parent organisation Fundraising Institute Australia, and other partner organisations, to develop and deliver components of the Include a Charity campaign for mutual benefit, government influence and growth and expansion of memberships and the public-facing campaign.

3. To advocate for operational and legislative change with government to smooth channels for growth in bequest fundraising in Australia.

Government Policy & Advocacy



Expanding strategic partnerships with collegiate sector organisations to understand sector needs to reinforce a collective message and voice to parliament.



To collaborate with international consortiums and legacy campaign leaders around the world to understand their bequest landscapes and developments to inform and improve Australian gifts in Wills fundraising.



Utilise the **IAC Taskforce** and **Advisory Committee** to develop and adapt policy proposals to government ministries and other professional influencers through knowledge-sharing and articulation of sector needs and philanthropic advancement in gifts in Wills.

Work with FIA Policy and Regulatory team to combine efforts, connect with useful ministries and effect influence and legislative change - to smooth the pathways for bequest giving for the Australian public.

4. Enhance knowledge, analysis and understanding of the bequest market to develop new strategies to grow the market in Australia and support advocacy and policy changes in government ministries.

Research & Partnerships



Investing further in a range of research projects: To improve results and outcomes for IAC members, all Australian charities and boards to better understand the GiW landscape and increase investment and marketing in Gifts in Wills fundraising.



To utilise research effectively and strategically through PR and media channels to reinforce messaging to the Australian public of the value of leaving a gift in their Will.



Expanding strategic partnerships with collegiate sector organisations such as Philanthropy Australia, Bequest Assist and More Strategic to enhance the breadth and reach of Include a Charity commissioned research



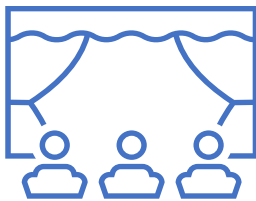
Collaborate and work with international consortium of Gifts in Wills/bequest/legacy campaigns around the world to develop knowledge, ideas, growth techniques and methodology. Attendance at the International Conferences.

5. To encourage estate planning professionals and influencers to reference gifts in Wills during the will-writing phase or in public forums to grow and support campaign objectives.

Influence estate planners



Pursue solicitor and will-writers survey and ongoing to secure more respondents: To understand Australian will-writers landscape and further develop the plan of action to grow our relationship with this cohort and foster greater empathy and understanding for philanthropic aims.



Include a Charity to have a presence at a variety of legal and estate planner and financial advisor events throughout the year, including a stand at the Queensland Law Society Symposium and a series of legal breakfast events.



Through the IAC Taskforce create a robust **Legal Legends** campaign to influence estate planners and other legal professionals to reference Gifts inWills as an option at the will-writing stage.



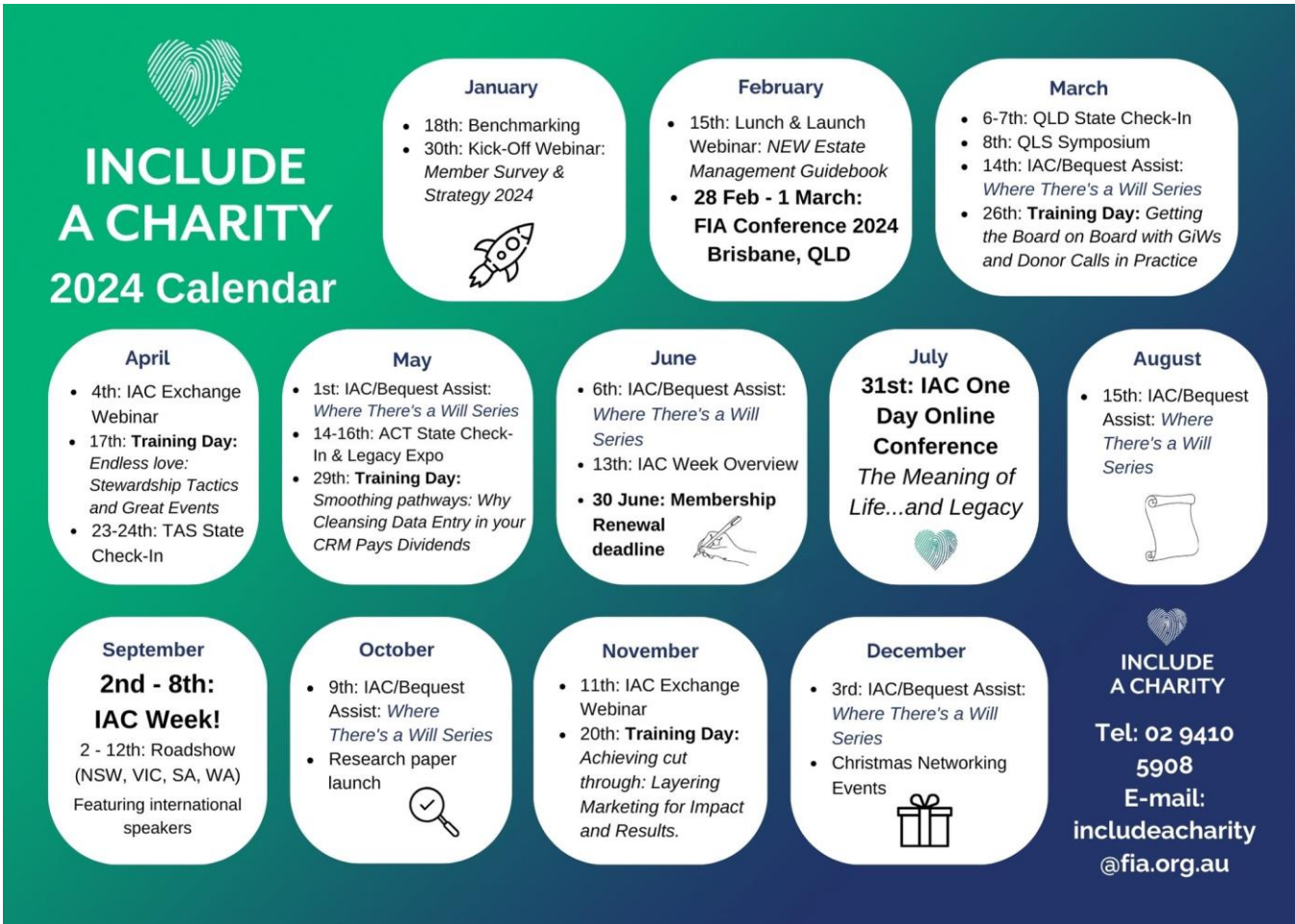
Through our Comms partners and IAC Taskforce develop and run a bi-annual PR and social media campaign for legal professionals to grow the Include a Charity website solicitor register and spread the campaign further across the legal sector.

Target

- Primary focus - Australians aged 55+ – primarily with no children; secondary with children.
- Secondary focus – Australians aged 35+ - for long-term vision, to capitalise on online will audiences and reflect intergenerational influence.
- Broadening demographic and profile of audience to reflect multi-cultural Australia.
- Continue to nurture new charitable organisations (especially in markets traditionally under-represented) to be part of the campaign to increase its influence and develop their own programs.
- Estate planning professionals, will-writers and influencing bodies.
- Policymakers and government ministries.
- Partner organisation collaborations to deliver more effective campaign over time and meet campaign goals.

Key Performance Indicators

1. Growth of IAC membership by 10%
2. Successful delivery with measurable data and statistics:
 - a) Include a Charity Week: Audience reach to exceed 20 million.
 - b) Include a Charity One-Day Conference - >250 attendees and >60 feedback survey responses.
 - c) Year-round public relations and marketing activities – Audience reach (socials/online/print) and website views to exceed 30 million.
3. One large-scale research project and one smaller project undertaken and delivered.
4. Measurable influence and impact on estate planning sector and government policy:
 - a) increased number of solicitors on Include a Charity website register to >70.
 - b) 120 articles to come out of Wills & Legal Task Force and used in legal, govt and wider media forums.
5. Membership survey responses that show:
 - Maintain 28% increase in member satisfaction of Include a Charity.



**INCLUDE
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2024 Calendar**

January

- 18th: Benchmarking
- 30th: Kick-Off Webinar: *Member Survey & Strategy 2024*

February

- 15th: Lunch & Launch Webinar: *NEW Estate Management Guidebook*
- 28 Feb - 1 March: FIA Conference 2024 Brisbane, QLD**

March

- 6-7th: QLD State Check-In
- 8th: QLS Symposium
- 14th: IAC/Bequest Assist: *Where There's a Will Series*
- 26th: **Training Day: Getting the Board on Board with GIWs and Donor Calls in Practice**

April

- 4th: IAC Exchange Webinar
- 17th: **Training Day: Endless love: Stewardship Tactics and Great Events**
- 23-24th: TAS State Check-In

May

- 1st: IAC/Bequest Assist: *Where There's a Will Series*
- 14-16th: ACT State Check-In & Legacy Expo
- 29th: **Training Day: Smoothing pathways: Why Cleansing Data Entry in your CRM Pays Dividends**

June

- 6th: IAC/Bequest Assist: *Where There's a Will Series*
- 13th: IAC Week Overview
- 30 June: Membership Renewal deadline**

July

31st: IAC One Day Online Conference
The Meaning of Life...and Legacy

August

- 15th: IAC/Bequest Assist: *Where There's a Will Series*

September

2nd - 8th: IAC Week!
2 - 12th: Roadshow (NSW, VIC, SA, WA)
Featuring international speakers

October

- 9th: IAC/Bequest Assist: *Where There's a Will Series*
- Research paper launch

November

- 11th: IAC Exchange Webinar
- 20th: **Training Day: Achieving cut through: Layering Marketing for Impact and Results.**

December

- 3rd: IAC/Bequest Assist: *Where There's a Will Series*
- Christmas Networking Events

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6. IAC Loop newsletter – compiled and distributed twice a month.



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