

Include a Charity Week Member Overview Webinar

IAC Week September 1st-7th, 2025

IAC Week Roadshow September 1st - 8th, 2025



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Topline overview:

- Theme
- Script and video
- Graphics and assets
- PR and media
- Digital
- IAC Week Roadshow

Theme: Plant a tree today... Change the world tomorrow

Objective. We illustrate how a simple act of giving grows into something profound, supporting various charitable causes that continue to flourish long after we're gone. To leave a gift in their will, emphasizing the long-term impact of their generosity

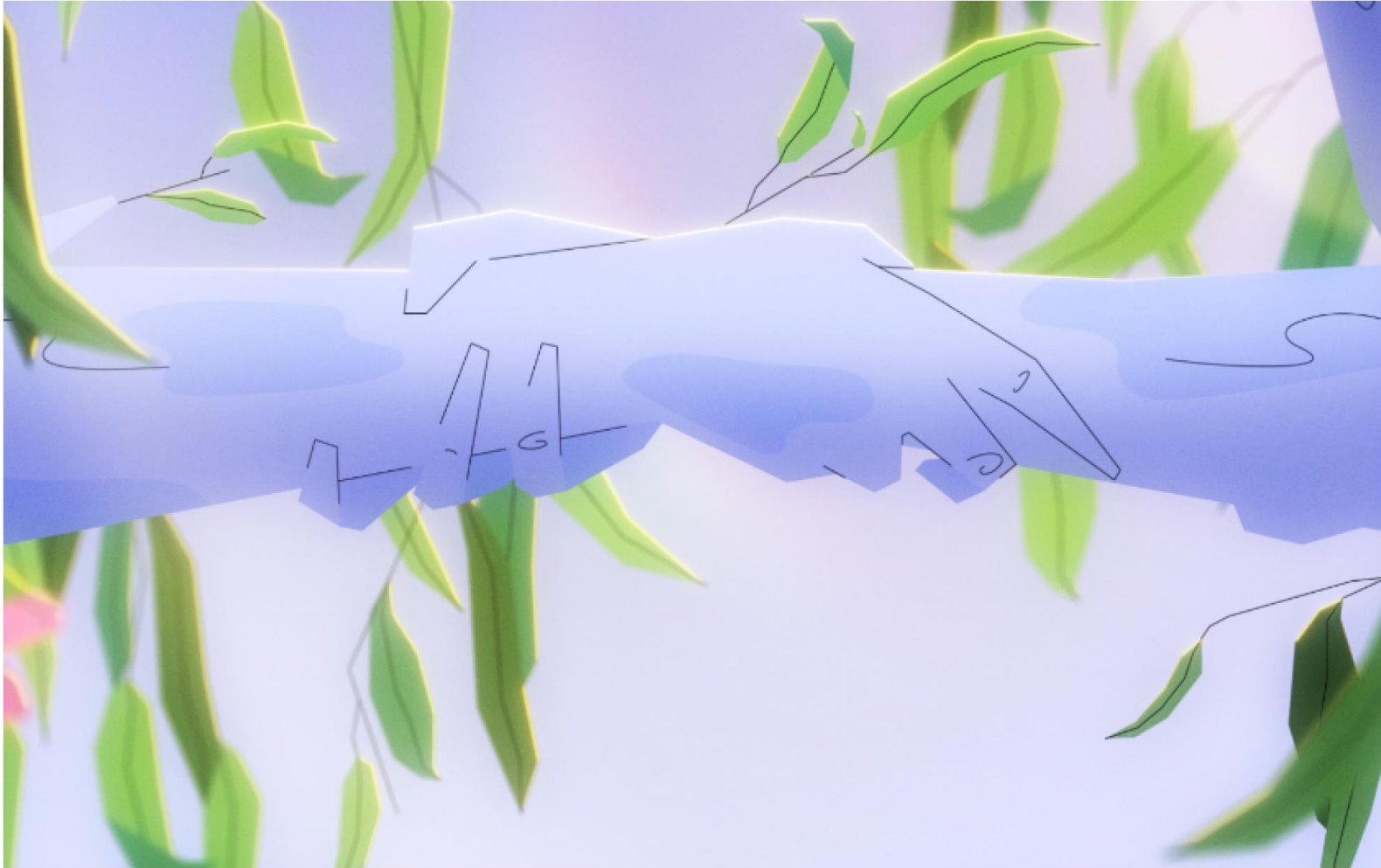
Visual Concept The tree symbolizes legacy, growing from a seed to a full-grown tree, with branches embodying different charities.

Style & Tone • Emotionally evocative but uplifting • Organic, painterly animation style • No detailed faces, emotion conveyed through body language & silhouette

Target Audience • Older Australians considering their legacy • Philanthropically minded individuals who want to leave a lasting impact • Families who may be involved in will discussions



Seed Cycle: Style frames for animation



Seed Cycle: branches become hands

Seed Cycle: Storyboard excerpt

9



Narration

As you grow, you reach out.

Visual

The seedling rapidly grows into a mature gum tree as we arrive in dense branches, subtly shaped like a stethoscope (representing Medical Research & Healthcare)

10



Narration

You support.

Visual

Cut to a different part of the tree, where a book is nestled into the branches, and a rope swing can be seen in the distance (representing Children's Education & Welfare)

11



Narration

you shelter.

Visual

Cut to a different part of the tree, where a bird is tending to a nest in its branches (representing Environmental Conservation)

12



Narration

you care.

Visual

Cut to a different part of the tree, where intertwining branches form clasped hands (representing Social Welfare & Community Support)

"As you grow, you reach out.
You support. You shelter.
You care."

IAC Week Assets



- Tiles (digital media)
- Banners (digital media)
- Letter
- eDM
- Downloadable booklet

PR & Media



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Good
PR + EVENTS



PR STRATEGY:
INCLUDE A CHARITY CAMPAIGN

PR STRATEGY



INCREASE AWARENESS of the campaign
through earned media opportunities



Engage influencers
& ambassadors To lend their
voice to the campaign



Encourage Australians
to Leave a
gift in their will



Good
PR + EVENTS





Earned media opportunities:

- Highlight the stories of those who have already chosen to leave a gift in their will
- Showcasing IAC new research, trends and stats
- Leveraging any influencer and/or ambassadors that support the campaign
- Utilising legacy legend and solicitor focused content



MEDIA TARGETS

Television

- Morning shows (ABC Breakfast, Sunrise, Today, Today Extra, The Morning Show) – packages or live interviews
- Current affairs programs
- Evening news

RADIO & PODCASTS

- Interviews / news grabs across appropriate radio stations and podcast programs


Print & Online



- Newspapers eg: The Australian, Sydney Morning Herald, Daily Telegraph, Herald-Sun, Courier Mail, West Australian
- News online eg: News.com.au, ABC, SBS, The Guardian
- Lifestyle eg: Yahoo, 7News.com.au, 9Honey, Mamamia, Seniors
- Industry: Legal publications

INFLUENCERS + AMBASSADORS

*Were engaging ambassadors and influencers to support IAC campaign.
Reach their networks on social media and/or leverage their profile for media opportunities.*



AMBASSADOR/INFLUENCER EXAMPLES:



DANNII MINOGUE
BANDANNA DAY
CANTEEN AUSTRALIA
SINGER / media personality

SAMANTHA JADE
Daffodil Day
CANCER COUNCIL
SINGER

CANDICE WARNER
RED NOSE DAY
RED NOSE AUstRALIA
iron woman / media personality

'ALF STEWART'
RED NOSE DAY
RED NOSE AUstRALIA
HOME AND AWAY STAR

Examples of IAC AMBASSADOR/INFLUENCERS WE'RE APPROCHING:



BARRY Du BOIS

TV personality
diagnosed with rare form of
blood cancer



Angela bishop

tv personality
Husband passed away from cancer



LIZ ELLIS

former Australian netballer

Campaign timeline



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YOUR CONTACT



Patty barrett

MANAGING Director / Co-FOUNDER

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Digital



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Social Media Strategy
We. Communications

June 2025

Who are We. Communications?



A team with the right experience:

- Our third year partnering with IAC on their social media efforts
- Team members with experience working with some of Australia's most trusted brands in the NFP sector
- Expertise in organic social, advertising, content development, digital content strategy

Our communications objectives working with IAC in 2025



Increase public awareness of gifts in Wills and drive growth in bequest giving in Australia.



Inspire Australians with the stories of donors and charities to educate them on the true impact of a gift in their Will.



Encourage and train estate planning professionals and wealth advisors to reference gifts in Wills for clients.

Social plan on a page

1

Inform

Educate Australians on the true impact of Gifts in Wills for charities

Content

Videos:

- The true impact of gifts in wills
- Things legal professionals should know
- The value of gifts in wills to society
- What fundraisers loves about gifts in wills

Measurement

- Video views
- Reach

CTA

Become a Legacy Legend

- Professionals: Learn more about how to inspire and discuss leaving a gift with your clients in their wills
- General public: Learn more about the impact of leaving a gift in your will

Channels



Budget

35%

2

Inspire

Demonstrate impact by sharing stories and donor case studies

GIFs, coverage, statistics:

- IAC research, trends and statistics e.g. Only X% Australians include a bequest to charity in their Will
- Case study stories in PR coverage
- Ambassador stories and coverage

- Engagements
- Website clicks

Become a Legacy Legend

- Professionals: Learn more about how to inspire and discuss leaving a gift with your clients in their wills
- General public: Learn more about the impact of leaving a gift in your will



30%

3

Involve

Encourage Australians to leave a gift in their will for charities

Website tiles and statics

- Stills with a focused and direct CTA
- Best performing content - repurposed

- Website clicks

Leave a gift in your will

- Professionals: Register to receive guidance on how to start a conversation with your clients
- General public: Connect with a charity today or discover solicitors near you



35%

Learnings from 2024, Opportunities for 2025

Learnings

Channel:

Meta is a strong channel to drive volume of results while LinkedIn had better engagement intent with 57% higher click-through-rate and 48% higher engagement rate compared to Facebook.



Opportunities

Leverage channel strengths by prioritising LinkedIn for high-intent, considered actions, while using Meta to maximize reach and awareness

Creative format:

Carousels ads across both Facebook and LinkedIn contributed to over 70% of total clicks and engagements, making this format more conducive to highlight the emotional messaging tied to our campaign.



Explore more video and carousel content featuring personal stories of individuals who have left a charitable gift in their Will. This 1:1 personal engagement will have stronger cut-through with our audience.

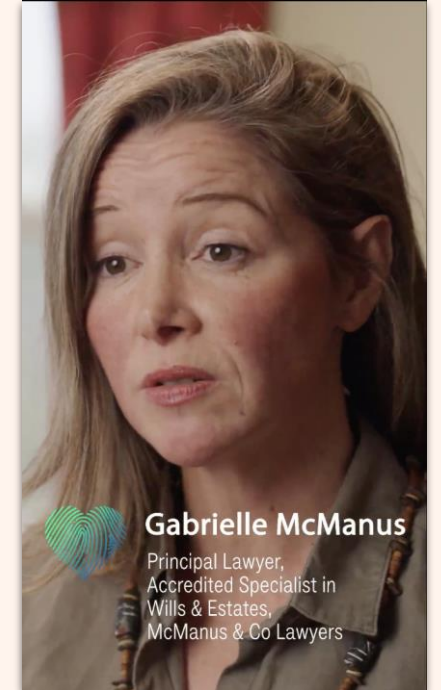
Content/Messaging

Thought leadership content on topics like charity trends and superannuation has consistently worked well in the media.



There is an opportunity to build on existing content and leverage executive thought leadership.

Examples of content



Overview of campaign

2.3M Impressions

Over the next 6 months, we expect to reach Australians 2.3M times across all our campaign content. This will be segmented by both General Public and estate planning professionals.

490K Video views

Based on results from last year's activity, we expect to drive an increase in video views across LinkedIn and Meta.

26K Website clicks

Based on results from last year's activity, we expect to drive an increase in website traffic to IAC by retargeting people who have watched our previous video content.

19K Engagements

We will have dedicated advertising spend to ensure that the right audience will be reached leveraging LinkedIn and Meta's targeting capabilities. This includes a mix of demographic, geographic, interest-based and behavioural signals.



Campaign Timings

Phase 1: Road to IAC week

June to July

- Launch social campaign with educational materials to inform and encourage audiences to learn more on IAC website

Phase 2: Road to IAC week

August

- Sustain activity in the lead up to IAC week
- Opportunity to integrate social and PR to drive more momentum through coverage and amplify for impact

Phase 3: IAC week Sprint

Late August - September

- Budget uplift at the most crucial moment of our campaign
- Retargeting those who have engaged with the campaign with a strong CTA



Questions?

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Humanize
Complexity

Thank you!

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IAC Week Roadshow



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IAC Week Roadshow – Keynote Speakers:



Nick Jaffer
F.EdPlus, FFIA
President & CEO,
Global
Philanthropic
(Asia Pacific)

IAC Week Roadshow – Keynote Speakers:



**Ligia Peña, CFRE and AFP
Master Trainer
International Legacy &
Fundraising Consultant
Globetrotting
Fundraising**

IAC Week Roadshow –



- Monday Sept 1 - Perth, WA
- Wednesday, Sept 3 - Melbourne, VIC
- Thursday, Sept 4 – Virtual Zoom
- Friday, Sept 5 – Brisbane, QLD
- Monday, Sept 8 – Sydney, NSW
- Sept 3 & 8 - Legal & CEO Breakfasts

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Make your mark

INCLUDE A CHARITY WEEK MEMBER OVERVIEW
Wednesday, June 11
10.30am - 11.45am

 Fundraising Institute Australia
The Professional Body for Australian Fundraising

Major sponsor
 **Apple Marketing Group**

Q&A



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Take aways and action items

- Plan your campaign now – teams and cross-teams and leadership (digital/comms/marketing/data analysis)
- Plan timelines for eDMs/website/socials/internal promotions
- Share graphics and assets to cross-teams early (can adapt for brand)
- PR and media – prime your local media to share doughnut release/
- Digital – Re-post when you see IAC Week promotions.
- Video – share the 60 second video on your personal socials
- IAC Week Roadshow – register yourself and teammates when registration is released.
- Establish tracking of metrics and activities.

Thank you
Be part of the movement



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FIA

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