

# 2025 Member Survey

Responses: 94



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# Our Approach

## Survey Approach:

- Conducted with **94 respondents**, reflecting a **38% increase** (26 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 2025 Member Survey?

## Triumphs:

Clear Alignment on the Purpose of IAC

A Strong and Engaged Community

Clearer Measurement of Impact

## Opportunities:

Amplifying Collective Awareness and Impact

Growing Legal and Financial Advisor Networks

Enhancing Resources for Diverse Needs

# Value of Include a Charity

## Training and Development

*"Great Training modules and guidance on fundraising and GIW."*

## Networking and Collaboration

*"The opportunity to be involved in the Advisory Council is really important to me and being part of a bigger conversation about Gifts in Wills as a collective is invaluable."*

## Advocacy and Industry Impact

*"The external work IAC do with policy makers and financial advisors is hugely important, we're happy to support this."*

## Event Quality and Accessibility

*"Attended most of the events offered and they have been very helpful for improving our best practice."*

## Access to Resources

*"Great marketing tools and resources."*

## Value for Money

*"The training and networking opportunities are valuable."*

## *What members are saying...*



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# Include a Charity Purpose and Impact



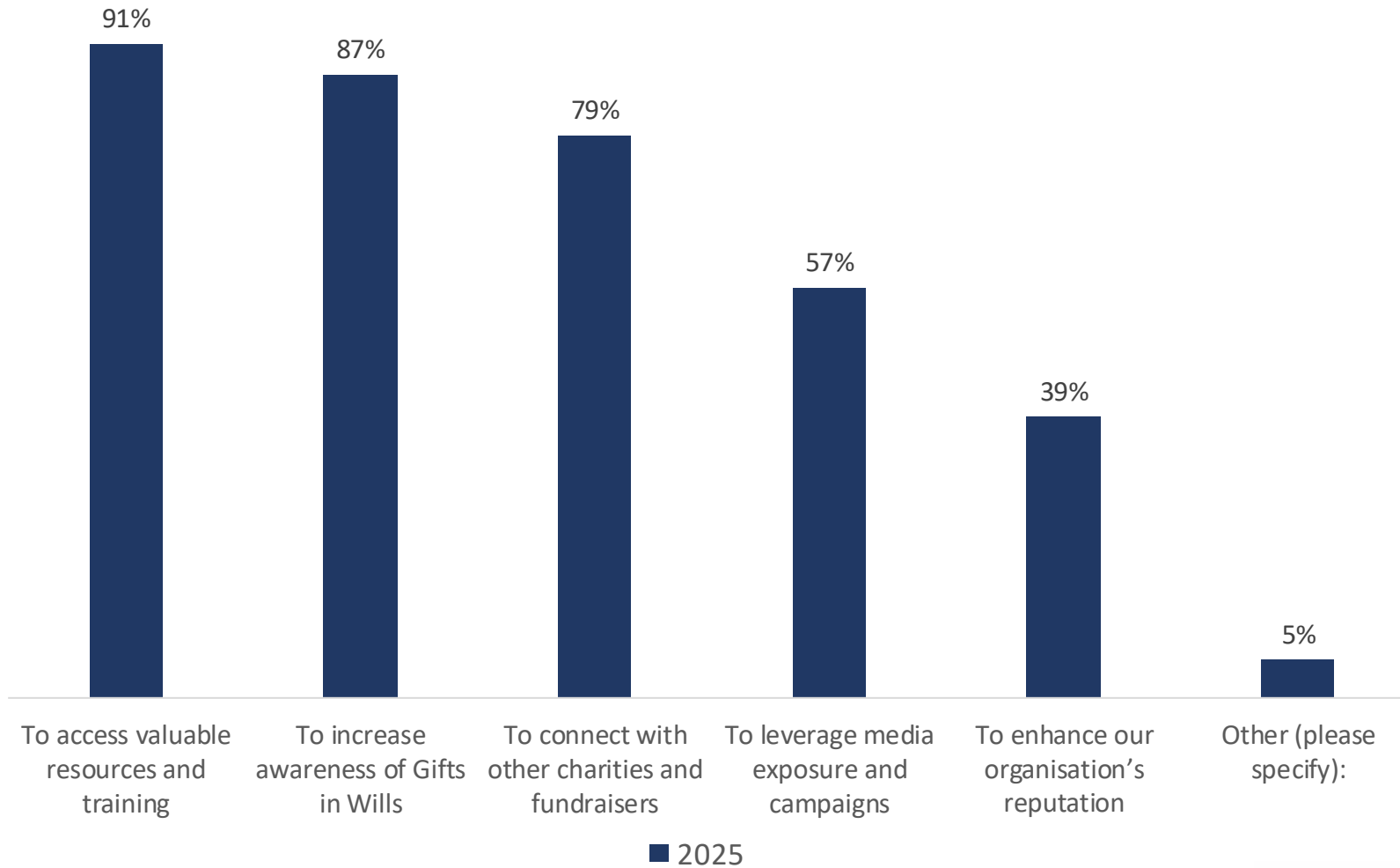
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# Purpose of IAC

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

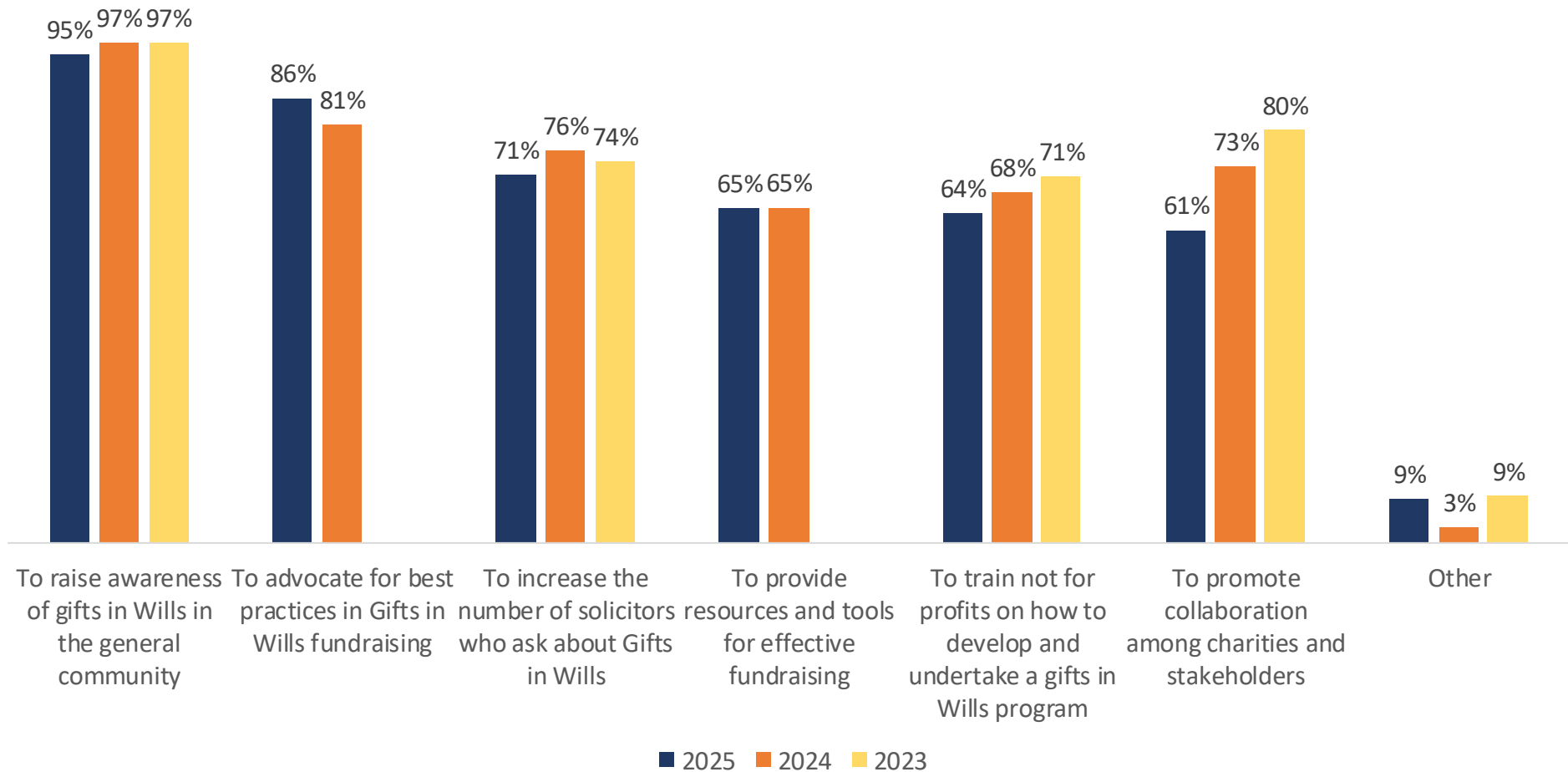


N: 94



# Purpose of IAC

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

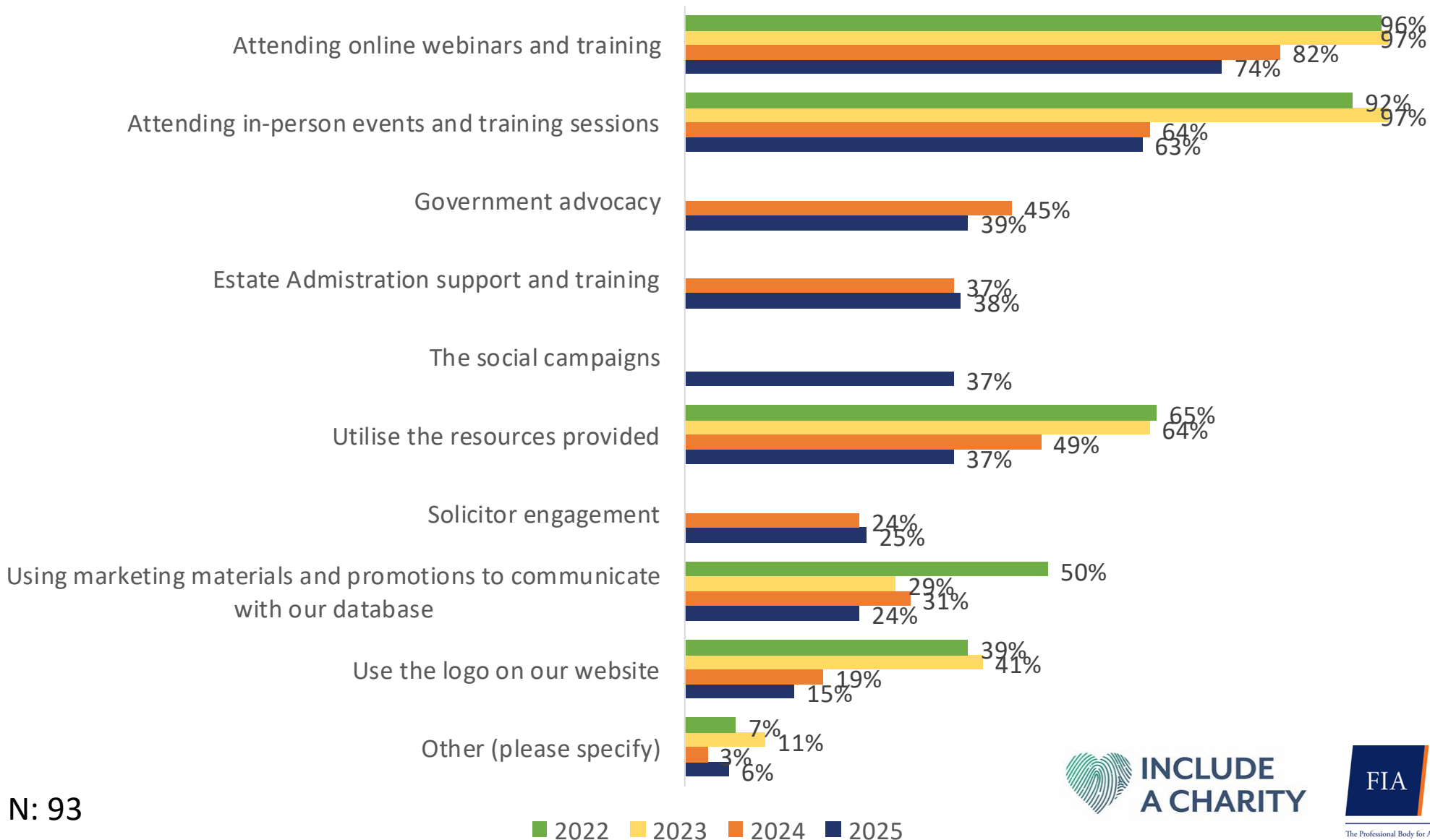


N: 94



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

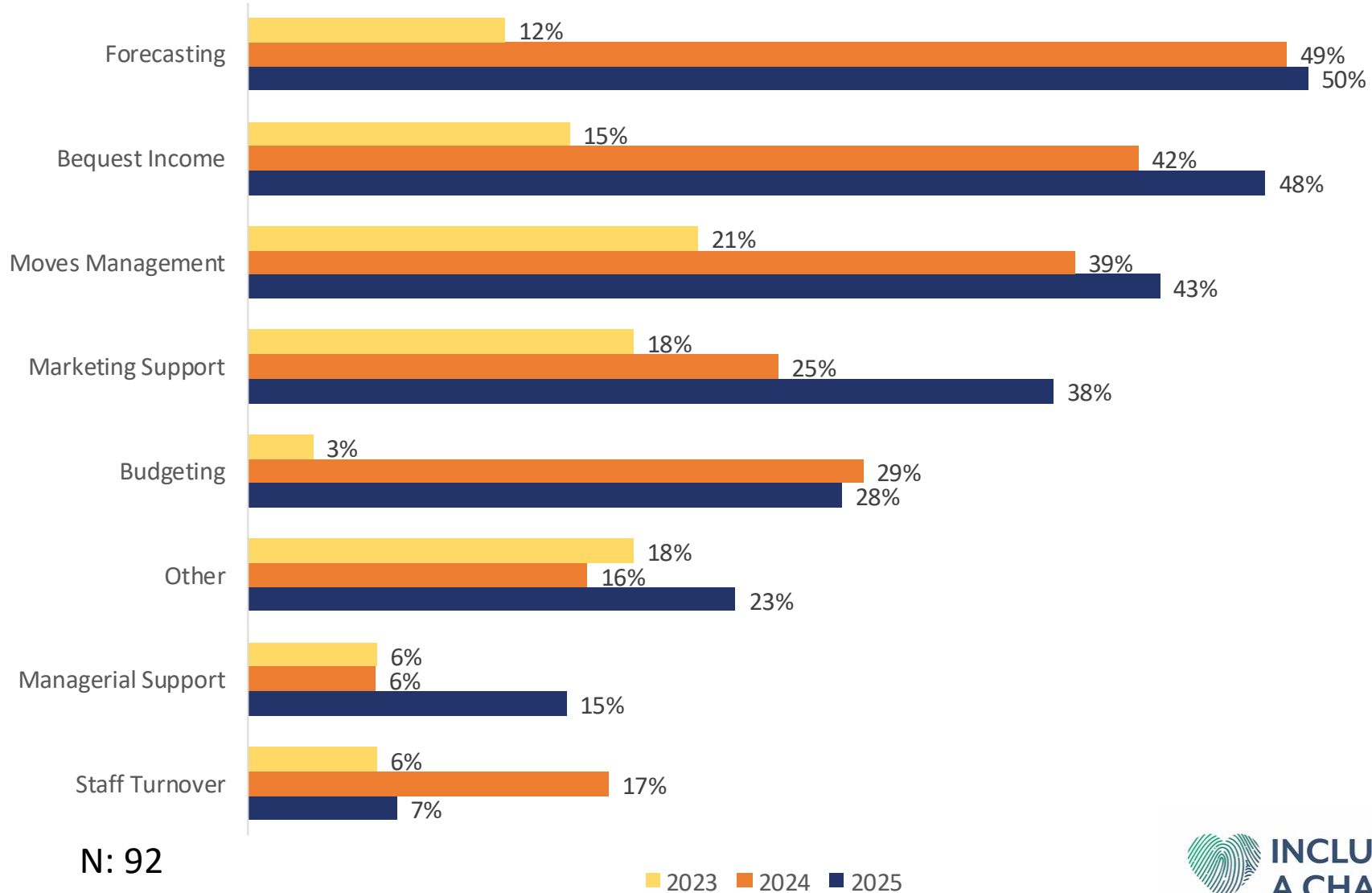


N: 93

■ 2022 ■ 2023 ■ 2024 ■ 2025

# Concerns

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



# Other

- Program is still in its infancy, and the donor pool has additional complexity when considering Gifts in Wills (GIW).
- Legal costs and delays.
- Limited internal capacity, with no dedicated GIW team or staff.
- Lack of Board and senior management support.
- Pipeline growth is a priority, with a need to increase the GIW pipeline.
- Limited team resources for relationship management.
- Staffing constraints: GIW is managed by the Head of Fundraising alongside major gifts, mid-value gifts, grants, regular giving, governance, and other responsibilities.
- Need for buy-in from other fundraising streams and internal stakeholders.
- Balancing policy and stakeholder expectations, particularly as the organisation operates in the xxx industry and cannot be perceived as opportunistic.
- Moves Management is relevant, but pipeline growth takes precedence as the program is still relatively young.
- Staying across the latest GIW trends in Australia and overseas.
- Overall, the program is not currently well supported.
- Limited capacity to develop and deliver the program effectively.
- Lead and enquiry acquisition challenges.
- Short staffing.
- Managing a program with very limited resources and a small database.
- Desire for ideas and learnings from other charities.
- Risk management in a fast-changing environment while pursuing growth.



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# Key Insights

## Capability-Building Remains Central

Members consistently engage with Include a Charity for training, resources, and professional development. Results highlight the importance of continuing to evolve capability support so it remains relevant to changing member needs.

## Shared Understanding of IAC's Core Purpose

There is strong alignment on Include a Charity's role in raising awareness of GIW and promoting best practice. Results suggest a need to consider how collaboration is positioned alongside other priorities to ensure efforts remain aligned with current member focus.

## Increasing Emphasis on Financial Predictability

Responses indicate increasing attention on forecasting, income reliability, and program management. This reinforces the value of strengthening practical tools and guidance as GIW programs continue to mature.

*What did we learn?*



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# Include a Charity Week Deep Dive

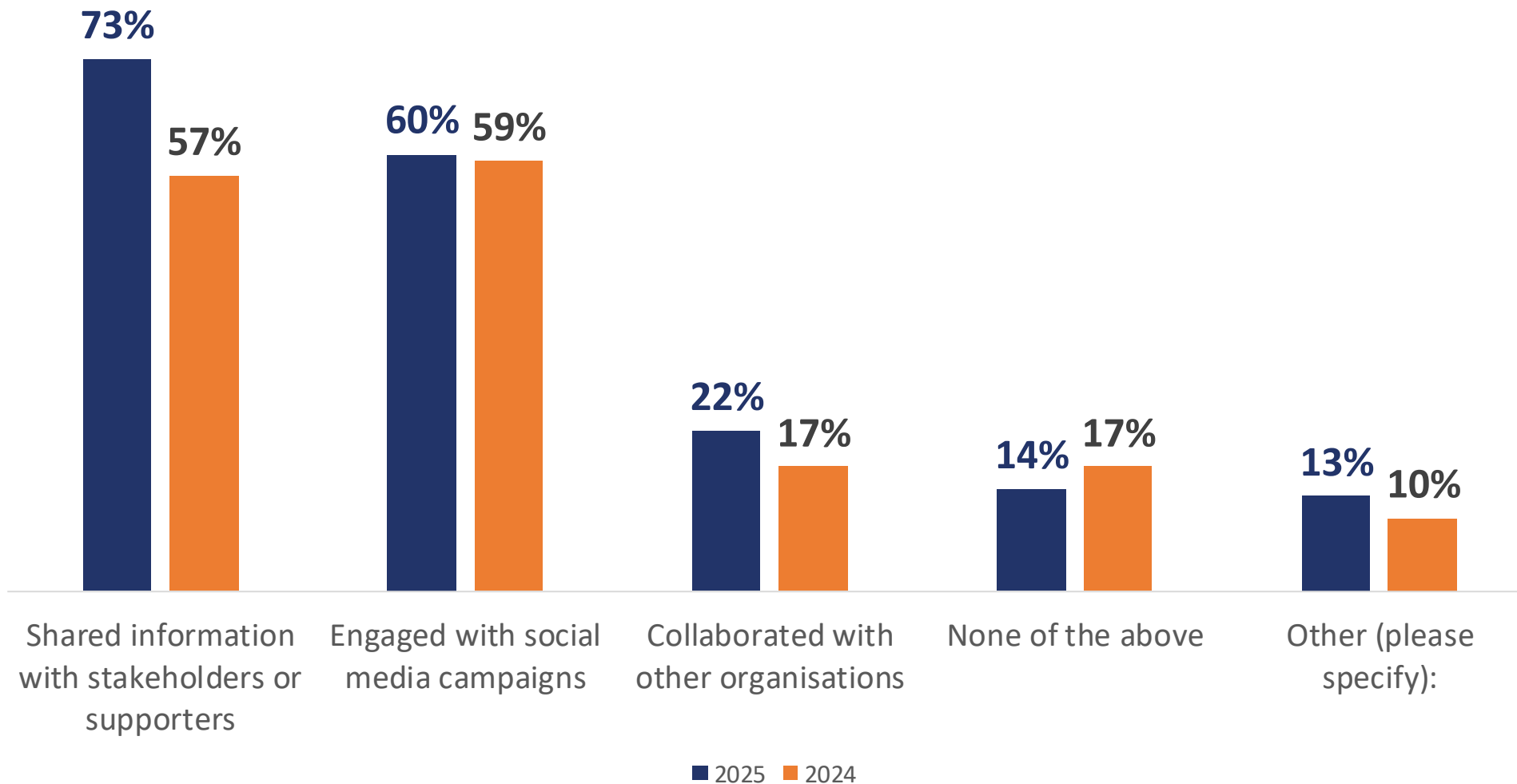


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Please share details of your involvement with IAC Week 2025.  
Select all that apply.



N: 90



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# How does IAC Week boost your Gifts in Wills program?

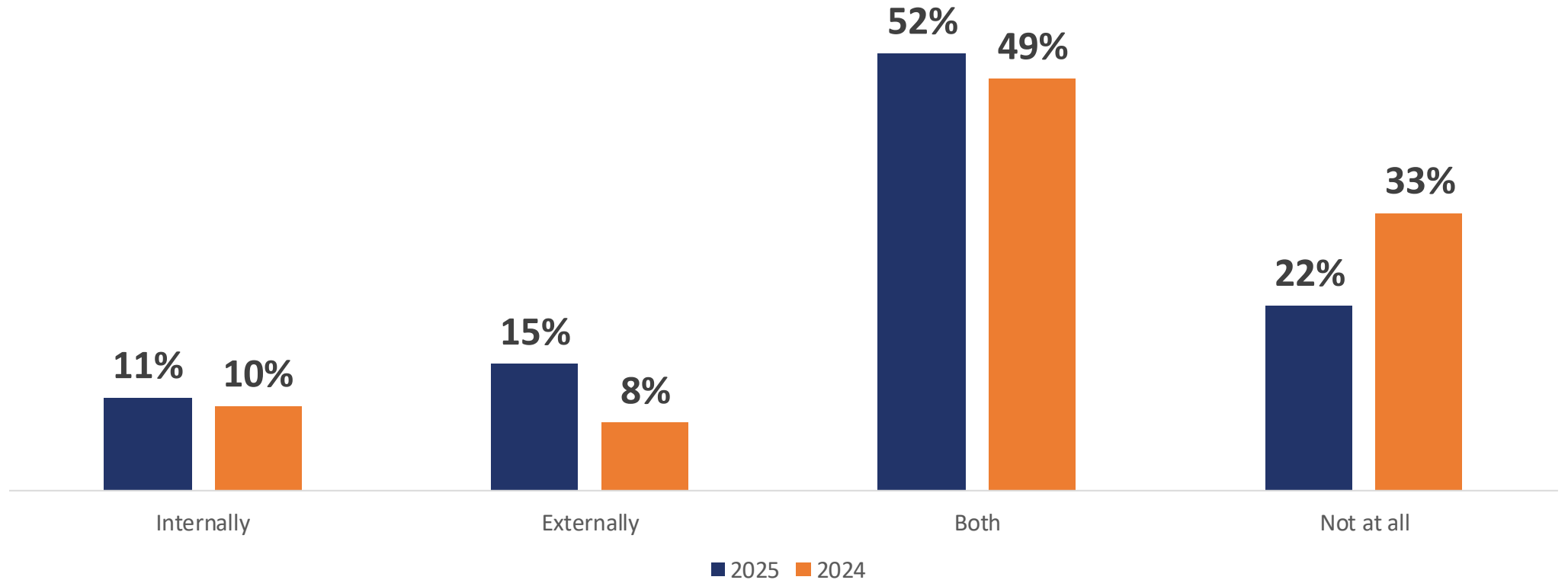
## Please rank.



|   | Average Ranking |
|---|-----------------|
| Increases awareness of our GiW program                            | 2.1             |
| Drives engagement with potential donors                           | 3.3             |
| Enhances visibility through media coverage                        | 4               |
| Fosters discussions around Gifts in Wills with stakeholders       | 4.2             |
| Provides valuable marketing materials and resources               | 4.6             |
| Encourages collaboration with other organisations                 | 5.6             |
| Generates new leads and inquiries about GiWs to your organisation | 5.6             |
| Boosts participation in our events and webinars                   | 6.9             |
| Other   | 8.6             |


N: 82

## Did you utilise the IAC Week messaging during this time?



N: 89

Please rank  
your  
preference for  
the following  
media assets:



|   | Average Ranking |
|---|-----------------|
| Downloadable Guide                      | <b>2.4</b>      |
| Graphics - Digital Tiles and Banners    | <b>3.3</b>      |
| Videos                                  | <b>3.4</b>      |
| Editable EDM Copy                       | <b>3.7</b>      |
| Videos Still                            | <b>4.3</b>      |
| Media Release to Share with Local Media | <b>4.5</b>      |
| Other                                   | <b>6.4</b>      |

N: 76



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## Flexibility Influences Asset Uptake

Feedback suggests that the ability to use IAC assets is shaped by existing brand guidelines and approval processes, particularly within larger organisations.

More flexibility and customisation options are seen as factors that could support broader and more consistent use.

*"We prefer to develop our own campaign tailored to our supporters interests and motivations."*

## Earlier Access Supports Effective Planning

Responses indicate that earlier access to campaign assets would help organisations better integrate them into existing planning and approval cycles.

*"If materials were released at least 3 months in advance to IAC week. Campaign planning and our lengthy approvals processes requires a much longer lead time"*

## Additional Guidance Would Support Confidence

Practical guidance - such as examples or workshops - would help teams make fuller use of the assets.

*"A workshop on engagement on gifting in wills for our communications and marketing team"*

## *What members are saying...*



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**Which channels achieved the best supporter engagement?**

**Please rank.**



|              | Average Ranking |
|--------------|-----------------|
| Email        | 2.5             |
| Social Media | 2.6             |
| Website      | 3.1             |
| Telephone    | 3.5             |
| Direct Mail  | 4.1             |
| Other        | 5.2             |

N: 76



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## IaC PR



*“Through life’s toughest moments, I’ve seen the power of support and community. Include a Charity is how we make sure that power keeps reaching others.”*

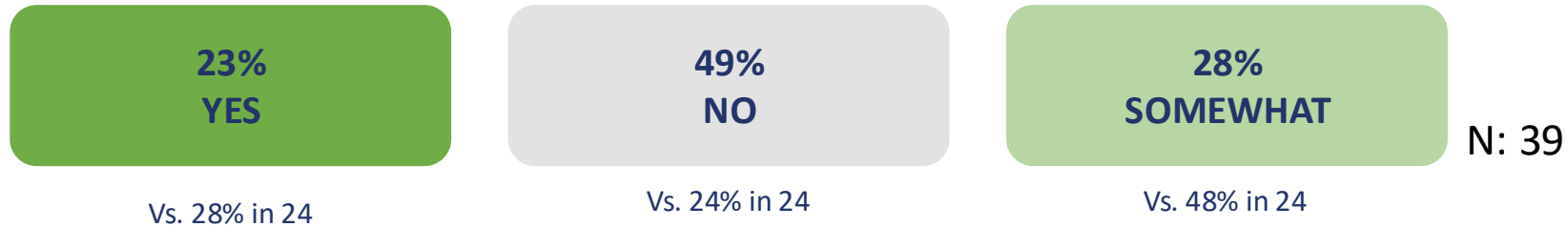
– **Barry Du Bois**, TV presenter and advocate living with a rare blood cancer

IAC Week 2025 Campaign Results saw us working with our new PR partner who brought in TV celebrity and IAC Ambassador Barry Du Bois, we secured 170 pieces of media coverage across television, radio, print and online, with a total audience reach of 5,139,956.

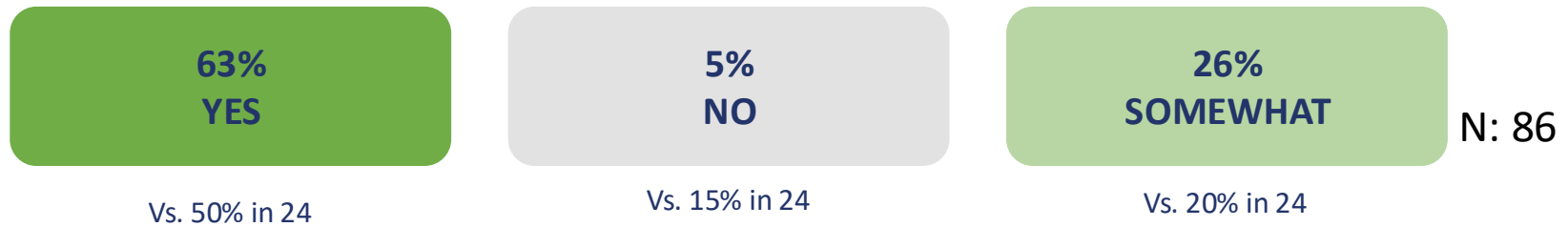


# Success of Include a Charity Week

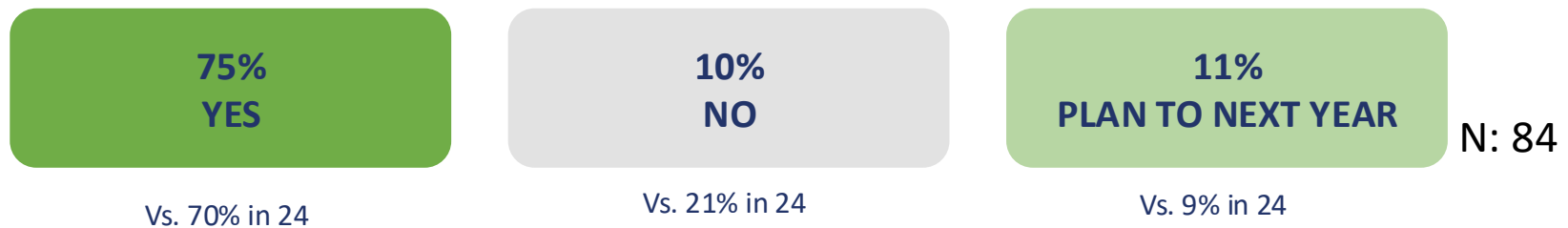
## Did media coverage increase your profile over IAC Week?



## Did you have support from your marketing team?



## Did you run social media over IAC week?



# Success of Include a Charity Week

## Please state your lead time for planning for IAC Week



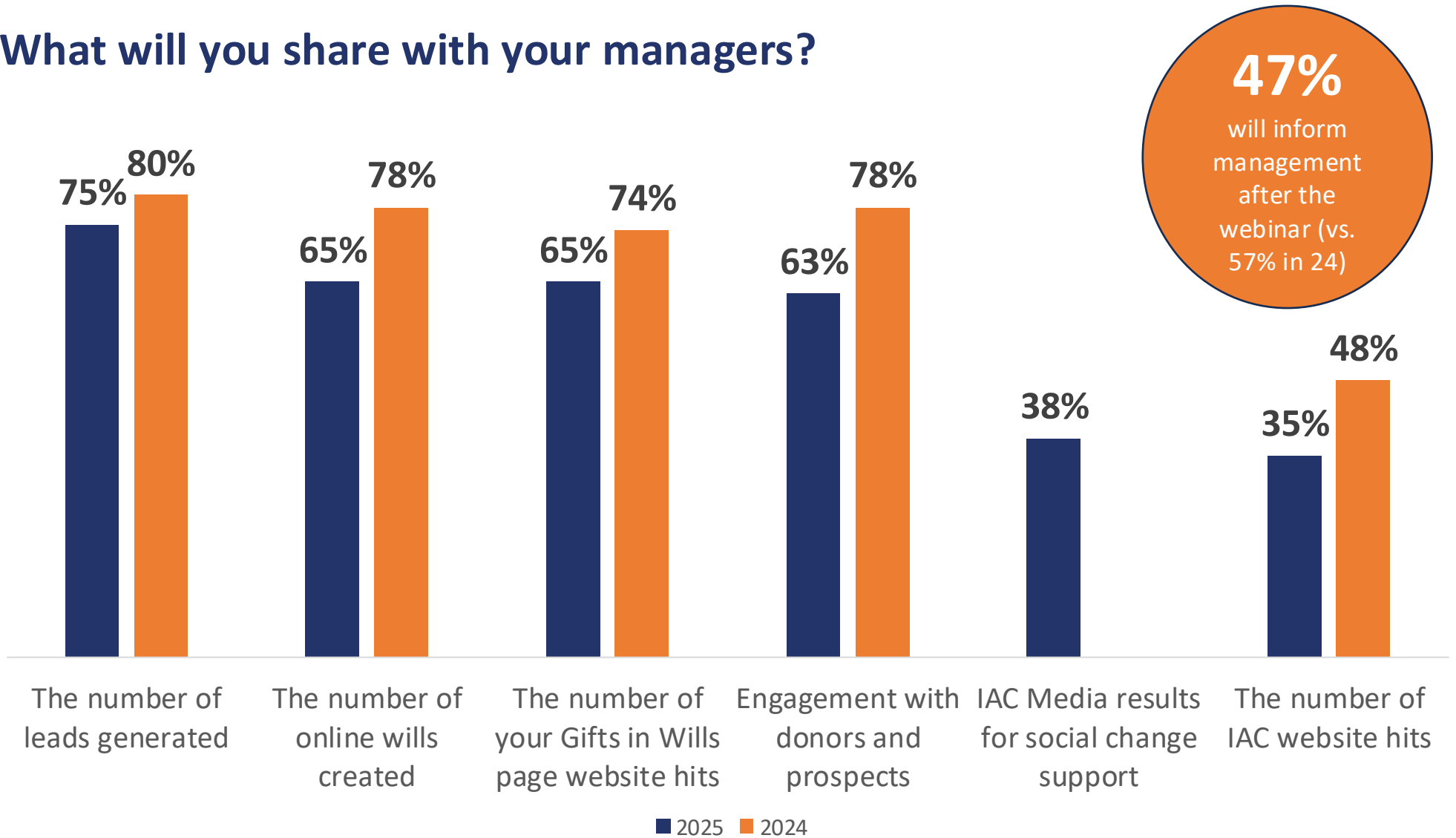
## Did you receive more digital coverage to your website for IAC Week?



## Did you generate leads for IAC Week?

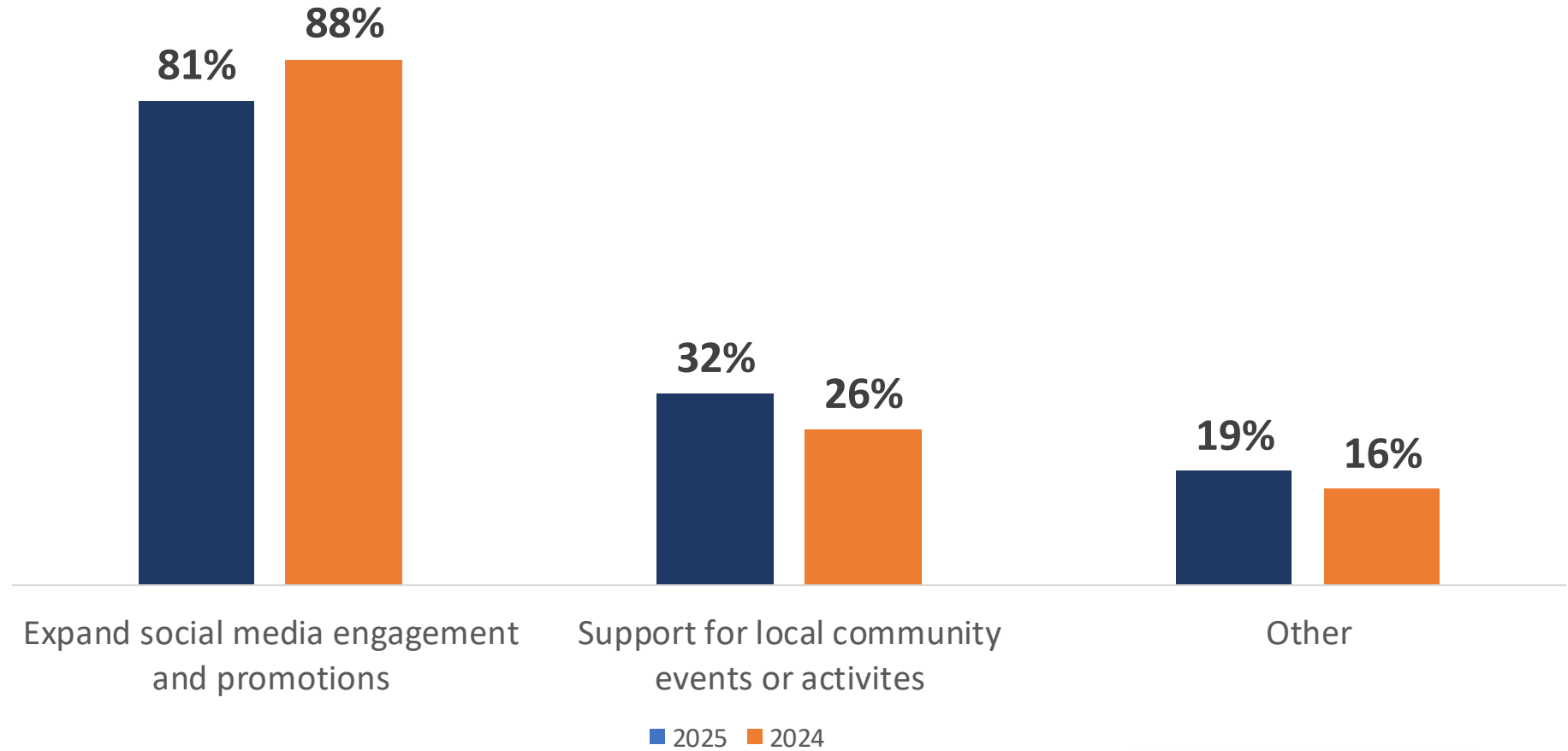


### What will you share with your managers?



N: 72 Not significant results

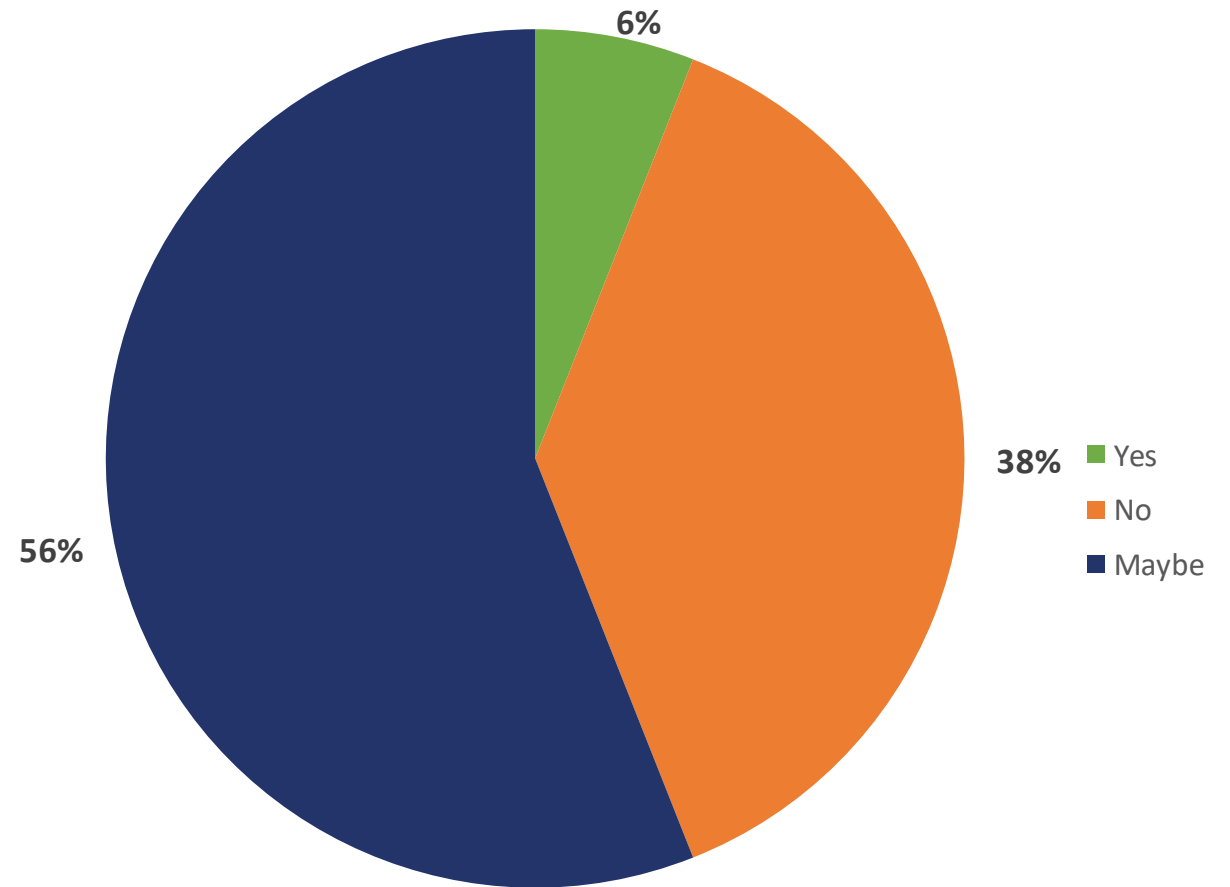
## How else would you suggest maximising your involvement in IAC Week?



N: 75



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



Growing  
Reach of IAC

N: 71

# Key Insights

## Digital Channels Anchor Member Participation

Email, social media, and websites continue to be rated as the most effective channels for supporter engagement during IAC Week.

Results suggest member effort is most confidently directed toward established digital channels, indicating where collective activity is currently perceived to deliver the strongest return.

## Consistent Digital Outcomes Year on Year

Results remain broadly consistent year on year, with 78% of members reporting lead generation and 74% reporting increased digital coverage during IAC Week.

These outcomes suggest coordinated digital activity, supported by social media and internal marketing teams, continues to underpin member participation and visibility.

## Preparation and Channel Choice Shape Participation

Most organisations plan for IAC Week three months or more in advance, showing the role of early preparation in enabling participation.

Responses also indicate a preference for established digital channels and a more cautious appetite for shared paid media, suggesting an opportunity to further clarify where collective promotion delivers the most value.

## *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 | 2.0             |
| Creating solicitor assets for Include a Charity Week          | 2.6             |
| More marketing and communications for behavioural change      | 2.6             |
| Devising and delivering gifts in Wills training modules       | 2.8             |

N: 74



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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 | 2.1             |
| Creation of a National Will Register                         | 2.5             |
| Probate reform for improved Will execution                   | 3.3             |
| Capital Gains Tax education for estate administrators        | 3.3             |
| Harmonisation of probate offices nationally                  | 3.9             |

N: 67



# Engagement



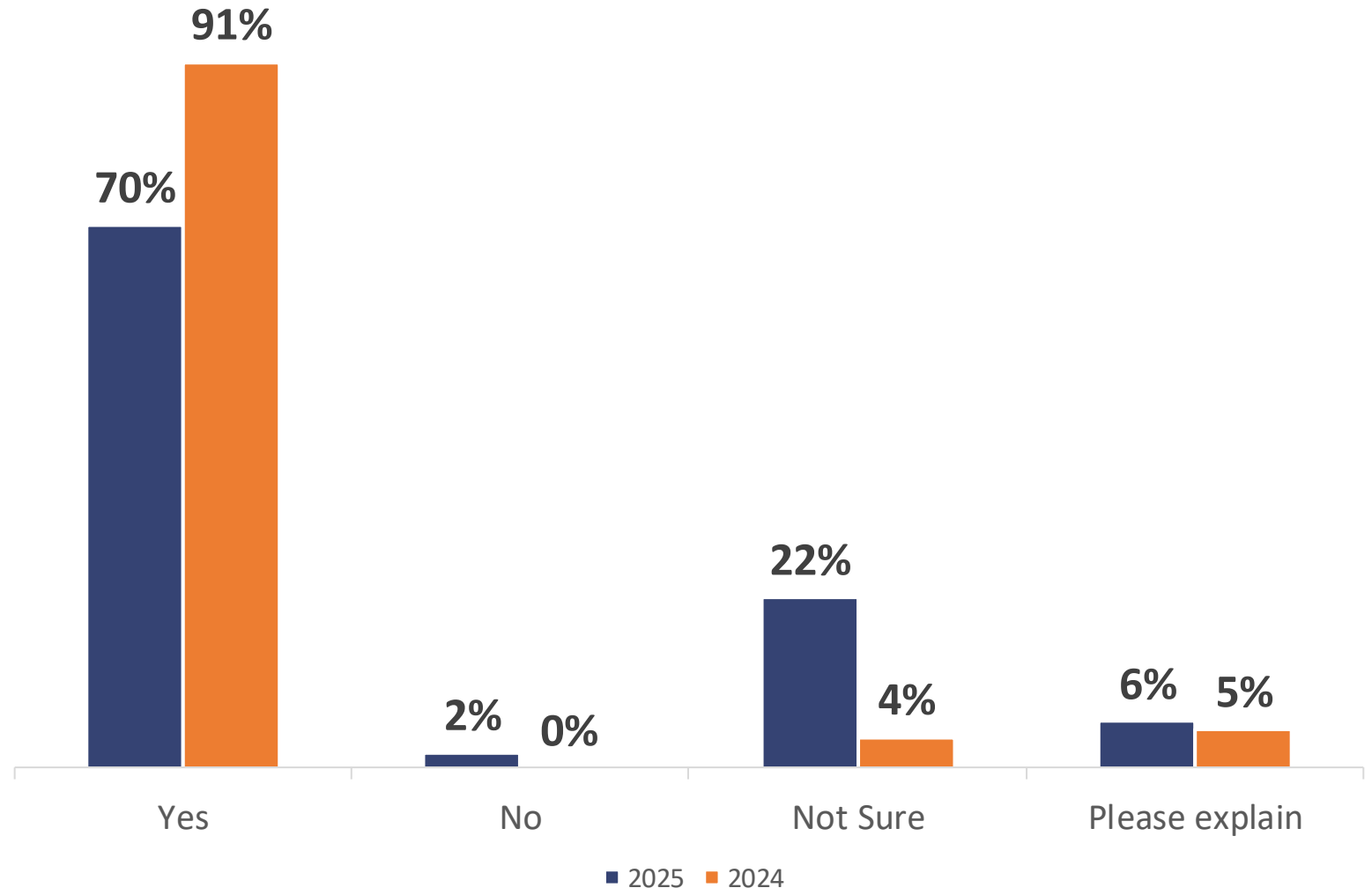
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We now drive traffic to your personal IAC web page through our social media campaigns and provide metrics and results to members.

Would you like to see more campaigns of this kind?



N: 82



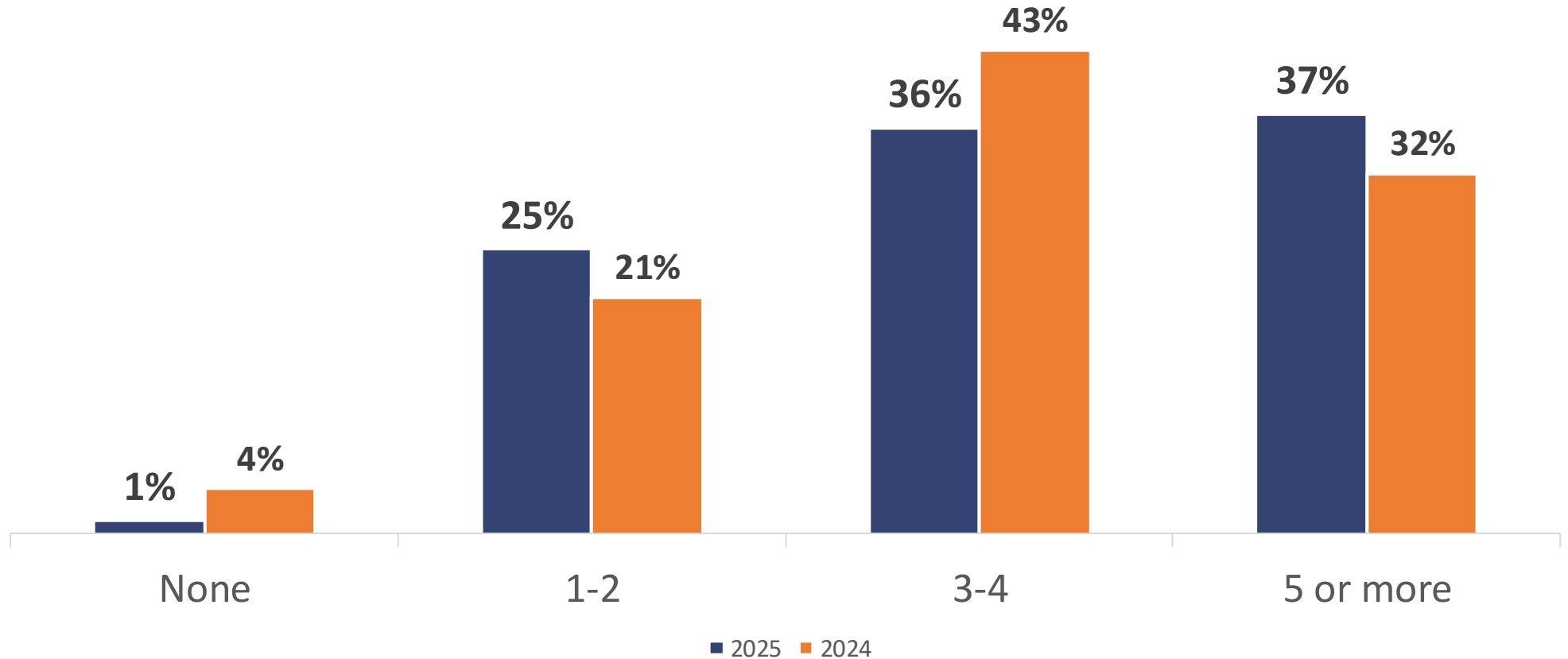
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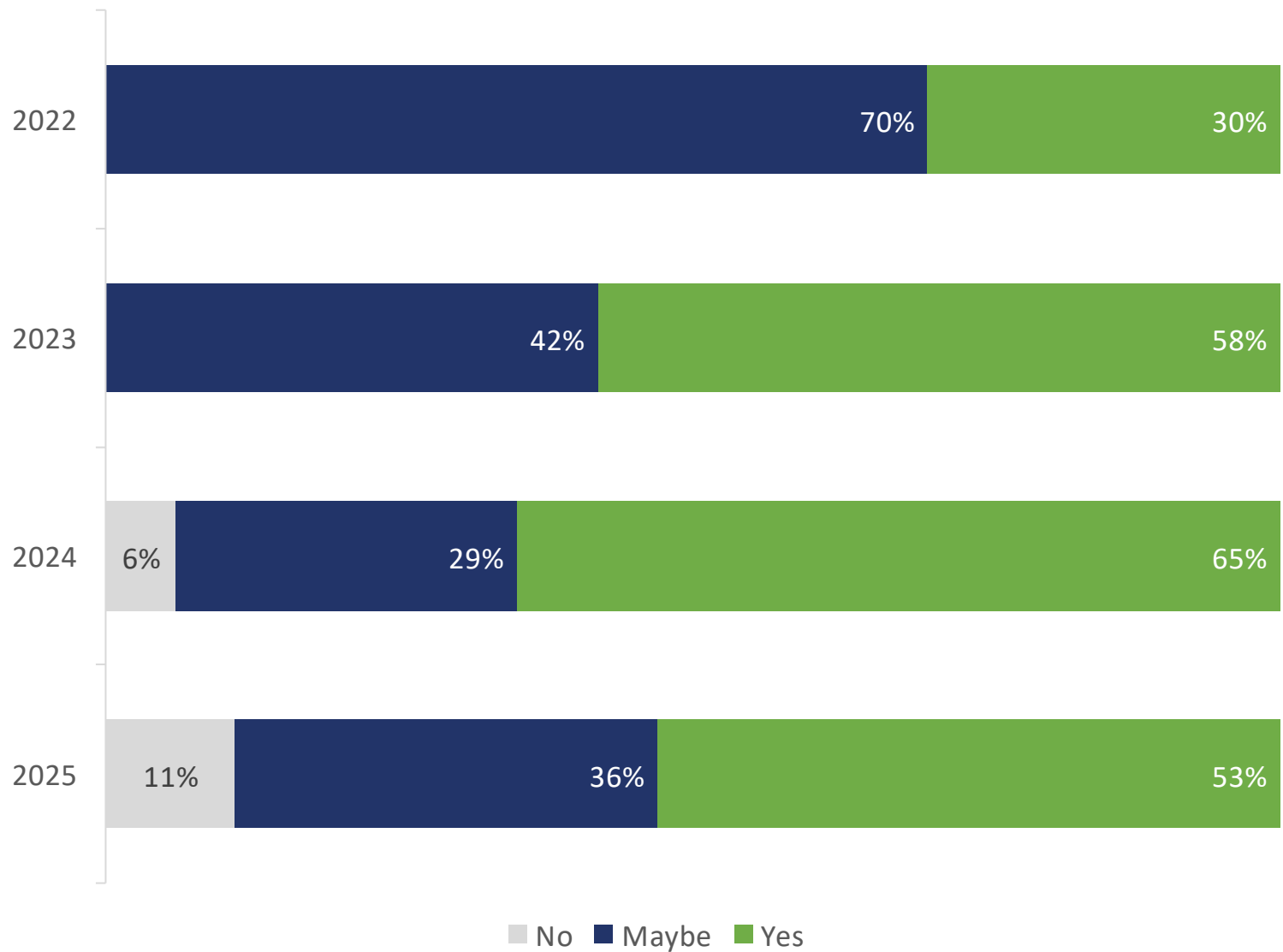
## How many IAC training days, events and webinars did you attend this year?



N: 83

From 2023-2024, 65% of IAC members reported they received value for money.

# Did you feel you received value for money in 2024-2025?



N: 83



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# Quotes

## Value

### Training and Events Are a Key Engagement Anchor

*"Lots of great training, workshops, webinars, activity. IAC goes from strength to strength each year."*

*"It enables access to latest information in the GIW sector and creates pathways to peers."*

*"The external work IAC do with policy makers and financial advisors is hugely important, we're happy to support this. "*

*"I found Bequest Assist collaborations for Estate Administration training really valuable."*

## Opportunities

### Social change has further to go

*"It's a lot to pay for not many conversions. But love being part of the IAC movement."*

*"The membership fee is not cheap"*

*"I feel IAC does good work, and I personally benefited from the learning and networking opportunities, but is hard to quantify impact on actual program"*

*"To put it simply, I want to see IAC get loud. Especially during IAC week but throughout the year."*

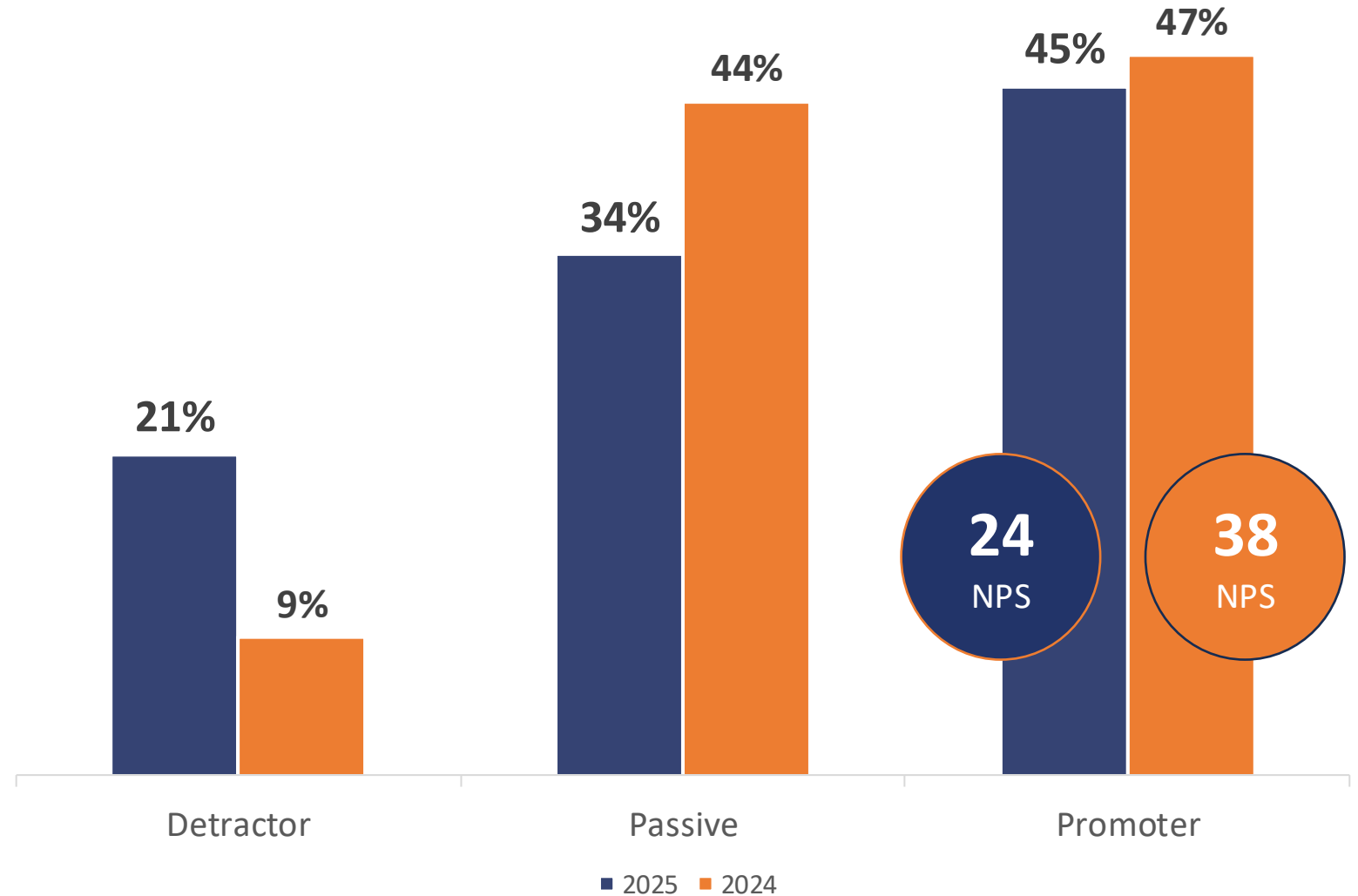


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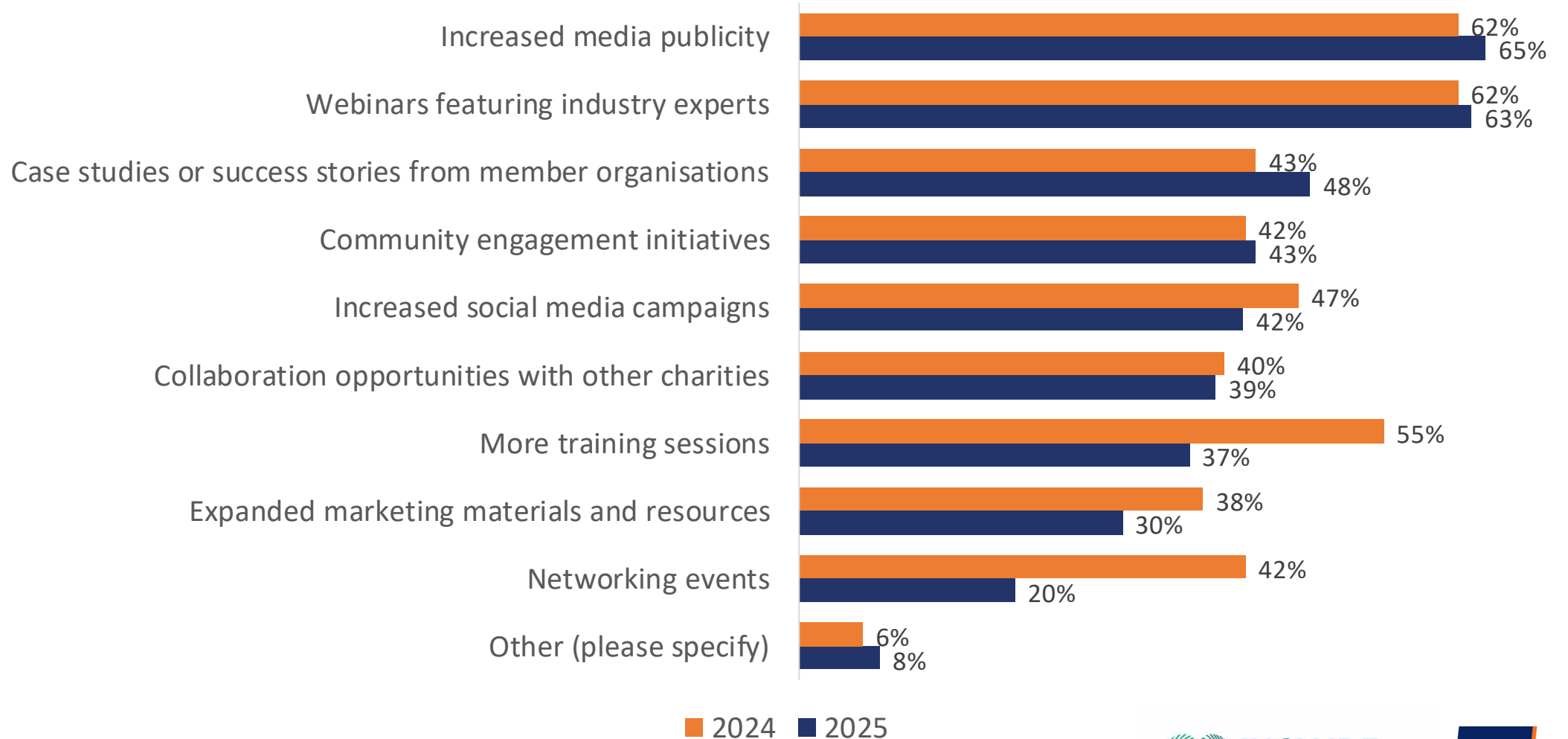
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# NPS: Would you recommend IAC membership to another organisation?




N: 80

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



N: 79

Please rank the following topics for IAC Conference:



|                       | Average Ranking |
|-----------------------|-----------------|
| Acquisition           | 2.7             |
| Stewardship           | 2.8             |
| Research              | 3.7             |
| Marketing             | 3.9             |
| Estate Planning       | 4.7             |
| Estate Administration | 4.7             |
| Human Interest        | 5.6             |
| Other                 | 7.8             |

N: 72



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# Key Insights

## Training and Events Are a Key Engagement Anchor

Engagement with IAC remains strong, with most members attending three or more training days, events, or webinars during the year.

This sustained participation suggests training and events are a primary way members stay connected to sector knowledge, professional development, and the broader fundraising community.

## Advocacy Is Linked to Perceived Value

More than half of members report receiving value for money from IAC, and overall advocacy remains positive, supported by a substantial proportion of promoters.

Open-text responses suggest advocacy is most often linked to the quality of training, access to shared knowledge, and feeling connected to a broader sector network.

## Opportunity to Strengthen Relevance Across Contexts

Members who were unsure or less likely to recommend IAC most often referenced organisational fit, internal capacity, or clarity of relevance rather than dissatisfaction.

This suggests an opportunity to further tailor how IAC's value is articulated across different organisational contexts, helping members more clearly see where offerings align with their specific needs.

## *What did we learn?*



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# Key Insights

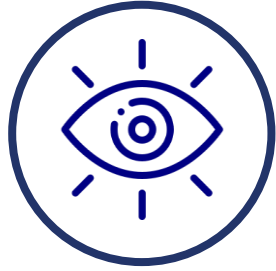


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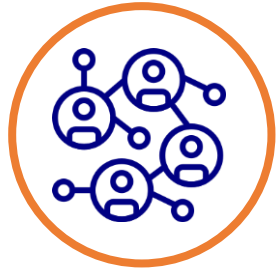
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# Triumphs



## Shared Clarity on the Role of IAC

Members demonstrate strong alignment around IAC's purpose in raising awareness of GIW, supporting professional development, and promoting good practice. This shared understanding reinforces IAC's relevance across a wide range of organisations.



## IAC Functions as a Consistent Point of Connection

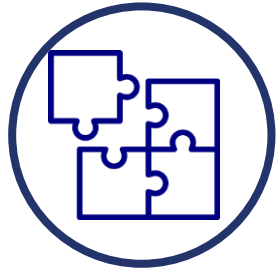
Sustained participation across training, events, and webinars suggests that members view IAC as an ongoing source of learning, sector connection, and insight - supporting engagement beyond individual campaigns.



## Digital Activity Continues to Support Member Visibility

Coordinated digital activity during IAC Week remains effective in supporting member reach and lead generation, particularly through channels where organisations already focus their effort.

# Opportunities



## Deepening Relevance Across Diverse Member Contexts

Variation in how members perceive value appears more closely linked to organisational context than to disengagement. There is an opportunity to further clarify and tailor how IAC's offering supports organisations at different stages of maturity and capacity.



## Enabling Broader Use Through Timing and Flexibility

Feedback highlights the potential to increase asset uptake through earlier release, greater adaptability, and practical guidance - supporting organisations with more complex planning and approval processes.



## Focusing Collective Promotion Where Impact Is Clearest

While digital channels are clearly prioritised, views on shared paid media are mixed. This suggests an opportunity to better define where collective promotion delivers the strongest return, or to concentrate efforts on channels members already see as most effective.

# Thank you for being part of a movement

[www.includeacharity.com.au](http://www.includeacharity.com.au)



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