



include a charity

Help the work live on.

# Impact Report 2016



**Include a Charity** is a collaboration of many of Australia's favourite charities, covering a range of causes and aspects of our community, from medical research and education to animal welfare, the environment, the arts and more.

The goal of the Include a Charity campaign is to encourage more people to leave a gift in their Will, increasing the funds invested in the charitable sector and thereby boosting the positive impact these organisations have on our society.

In 2015, Include a Charity became part of Fundraising Institute Australia (FIA). The campaign relies on its supporters, volunteers and partners who enable us to promote this important area of philanthropy. We extend our sincere thanks to all those who provide us with their expertise and pro bono support, including:



Include a Charity acts on behalf of campaign supporters to promote charitable gifts in Wills to the Australian public via television, radio, online and print advertising and throughout Include a Charity Week, held in September each year. Through these activities, we aim to raise the profile of charitable gifts in Wills, initiate conversations and engage the Australian community by asking them to think about their legacy and to consider including a charity in their Will. We also facilitate training in the charity sector, undertake market research and campaign within the legal community to encourage legal professionals to initiate conversations about charitable gifts during the Will making process.

Thank you for your valuable contribution so far to the Include a Charity campaign. Your support has already made a difference and we can achieve so much more working together.

## Our achievements in 2016

**A COMBINED INVESTMENT OF**  
**\$150,000** INTO  
 public awareness advertising and publicity delivered  
**\$878,284 IN MEDIA VALUE**

**MORE THAN 3,000 SOLICITORS**  
 now stock our campaign materials  
 so those making a Will can get  
**MORE INFORMATION**



We delivered best practice gifts in Wills  
**TRAINING, EVENTS AND SPECIAL INTEREST GROUPS**  
**TO 223 PEOPLE**  
 AND WEBINARS  
**TO 256 PEOPLE**  
 and presented at a variety of industry conferences



**UNDERTOOK A QUALITATIVE RESEARCH PROJECT**  
 WITH **FIVE** LEADING CHARITIES  
 to understand the motivations  
 of gifts in Wills donors



### Spotlight on

**include a charity week**  
 Help the work live on.

*5-11 September 2016*

- Nearly **200 people** attended our Include a Charity Week events across Australia
- **90,189 people** reached on Facebook and 391 new page likes
- Digital campaign video received **76,000 views**
- **243 website clicks** through display remarketing
- **219 clicks** to our website from our Lawyers Weekly online banner
- **276 views** of our Include a Charity Week article on Lawyers Weekly website
- **39 media pieces** across, print, radio and online in the lead up to and during the campaign
- **\$163,560** in media value delivered by Initiative during September
- **61% supporter engagement** against a target of 40%

## Managing the campaign

2016 was a year of consolidation. Our 2015 integration with FIA has allowed us to strengthen our back-office processes and utilise a wider team to improve our service to supporters. We welcomed our first full-time staff member, Campaign Coordinator Kate Delaney, who is based at the FIA office, and is responsible for the day-to-day running of the campaign and addressing supporter enquiries.

Our Campaign Director, Karen Armstrong MFIA CFRE, finished with us in October 2016, after 18 months, to focus on other projects. Karen's leadership was integral in the successful integration of the business and expansion of Include a Charity's partnerships and industry relationships. Helen Merrick has been in the role since October 2016.

Include a Charity would like to thank our 2016 Advisory Committee members and Ambassadors for their input, time and effort. We are hugely grateful to our outgoing Chair, Ross Anderson MFIA, for his contribution to our campaign over the past five years. Roewen Wishart FFIA CFRE stepped into this role in 2017 and is already working hard with us to continue the success of the campaign.

### Advisory Committee

- Ross Anderson MFIA (Chair)
- Dr Christopher Baker AMFIA
- Paul Evans
- Pauline Keyvar
- Sharne Nicholls
- Carol O'Caroll MFIA
- Jen O'Donnell AMFIA
- Maisa Paiva MFIA
- Rebecca Passlow
- Elizabeth Phegan MFIA
- Julia Schaefer
- Jakki Travers
- Emma Wills
- Roewen Wishart FFIA CFRE

### Ambassadors

- Trevor Capps EMFIA (Chair)
- Susan Ball
- Linda Bolton
- Frances Cinelli EMFIA
- Caroline Lord
- Maisa Paiva MFIA
- Amanda Shiell MFIA



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2017 marks the beginning of **Include a Charity's** new three-year strategy. Our vision is to significantly increase the amount of revenue left to Australian charities through gifts in Wills over the next decade.

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Over the next three years we plan to:

- Increase the percentage of solicitors likely to ask their clients about including a gift in their Will from 27% to 40%
- Increase non-rejecters of the concept to be consistently over 30%
- Increase consideration of leaving a gift in your Will to 20%

Thank you for your support so far. We look forward to working with you in the future to increase the impact of gifts in Wills in Australia.

If you would like to be more involved in the campaign please contact our Campaign Director, Helen Merrick, at [hmerrick@fia.org.au](mailto:hmerrick@fia.org.au)

 [facebook.com/includeacharityAUS](https://facebook.com/includeacharityAUS)

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