

include a charity week
Help the work live on.

11-17 September 2017

Campaign Director – Helen Merrick
May 2017

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Overview

1. Why be part of the campaign?
2. Community awareness campaign
3. Legal and financial advisers campaign
4. Keynote Speaker Series
5. Suppporter engagement
6. What next?

Overview

Include a
Charity's role

Consideration

- Have you ever considered leaving a donation to a charity or not-for-profit organisation in your will?

Intention

- When you next update your will/make a will (delete as necessary), how likely are you to leave a donation to a charity or not-for-profit organisation in your will?

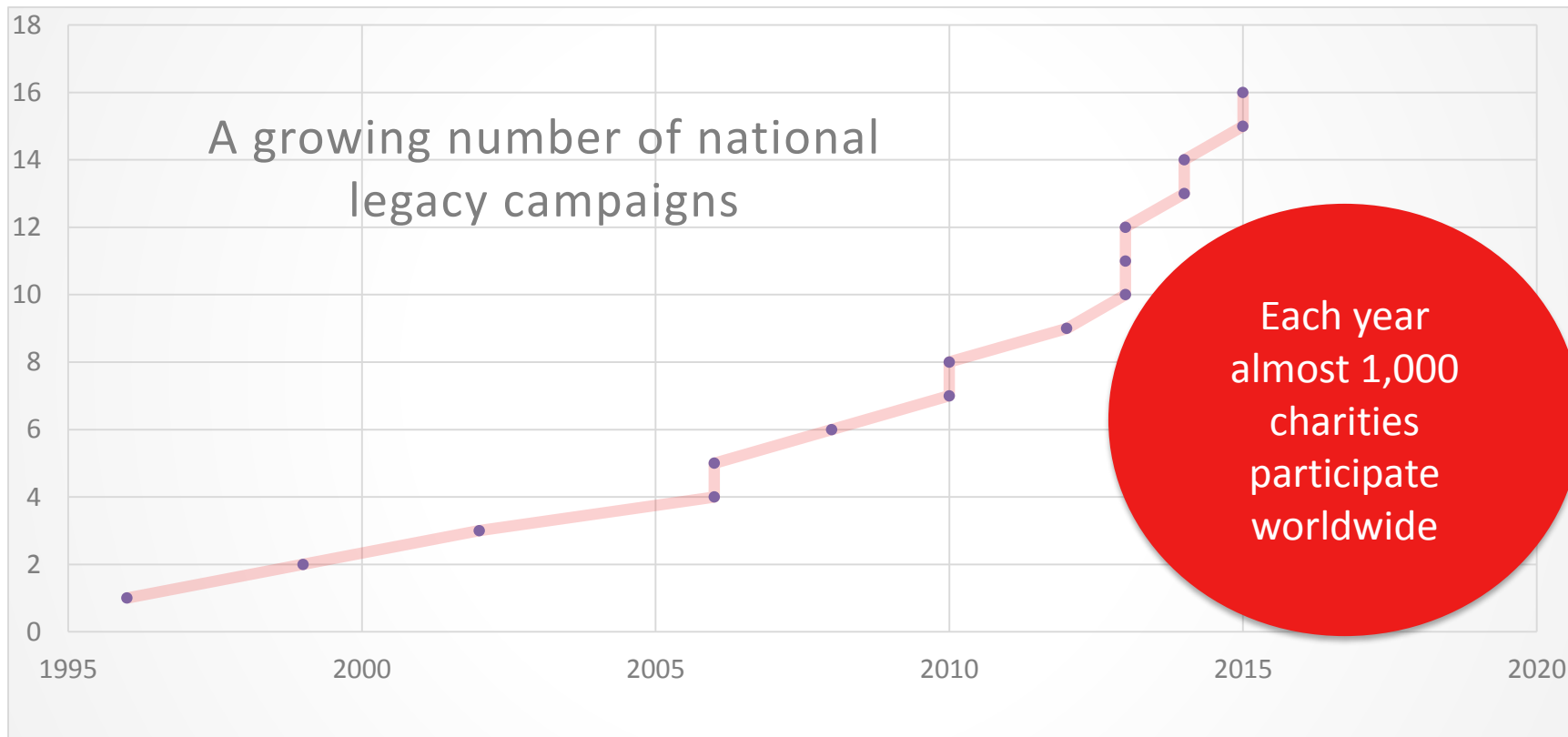
Action

- Have you left a donation to a charity or not-for-profit organisation in your will?

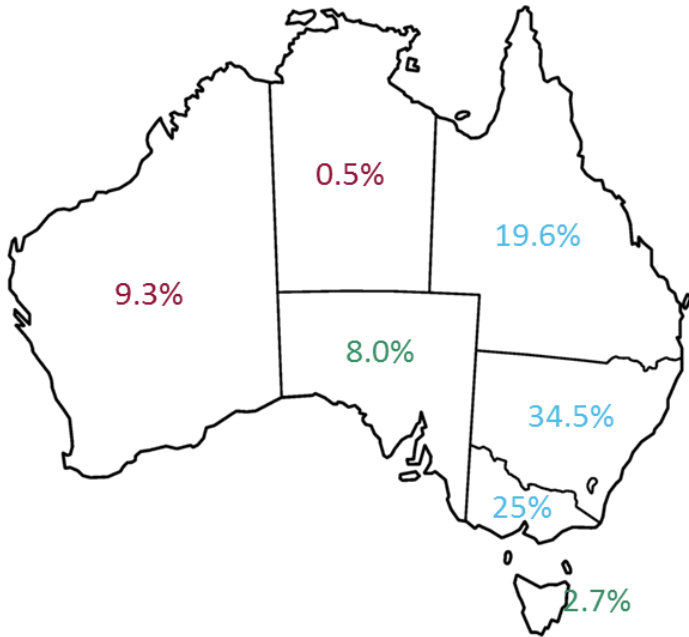
Recommendation

- How likely would you be to tell others about leaving a donation in their will?

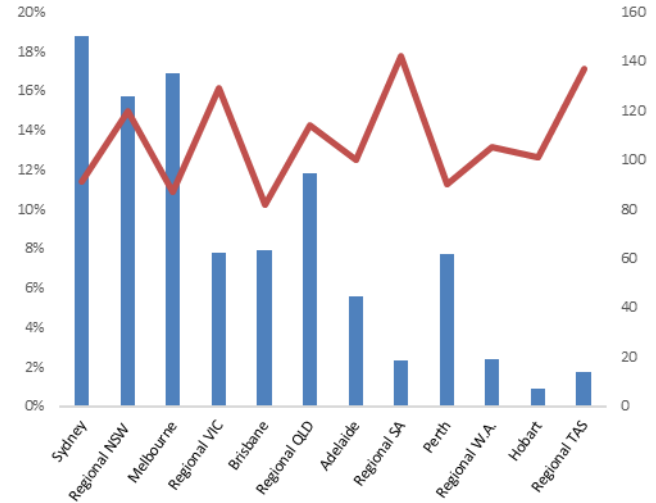
International legacy campaigns



Target: Australians 55 years +



SKEWED TO REGIONAL AREAS



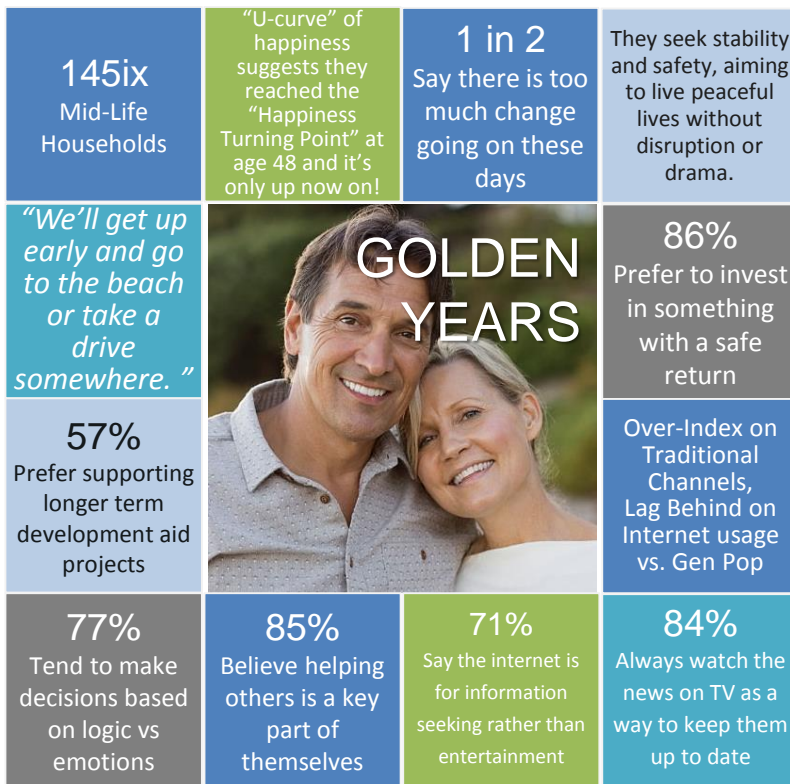
Target: Australians 55 years +

HAPPIER THAN EVER

Markedly higher levels of confidence, satisfaction and time has resulted in these couples leading happier lives as retirees.

HELP WHERE IT MATTERS

Willing to offer help as it is a key principal of life, they tend to lean towards charities that are doing great work providing proactive aid and support.



TRADITIONALIST COMFORTS

On the whole, they aren't willing to take big risks, make rash decisions or be swept up in the latest fad.

OVERLOAD AVOIDANCE

Experience gives them the confidence to collect & consume information without going into the deep end. Traditional channels like TV, Newspapers & Radio still enjoyed regularly.

Media activity

Medium	Format	Publishers	Timing
TV	30second TVC	Foxtel	August (Lead up ti IAC Week) and IA Week
Newspapers	HPC & Medium Strip	News Ltd	August (Lead up ti IAC Week) and IA Week
Digital	Video and Display	Fairfax, Realestate.com.au, Facebook, Cadreon, Yahoo7!, News.com.au	August (Lead up ti IAC Week) and IA Week

Digital

- **Prospecting (audience building)** - Start by reaching the target audience and encouraging engagement in the video content being produced by Momentary.
- **Remarketing** - Reach back out to those people who engaged with the video content and encourage them to visit the IaC website to read further information on how they can have a positive impact on society by making a gift in their will.
- **List build for future engagement** – Facebook ‘likes’ and test email harvesting.

Digital

- **YouTUBE** – engaging supporter focused video
- **Facebook** – highly targeted ads, video and promoted posts
- **Paid Search**
 - Paid Google AdWords
 - Existing Google Grant
- **Display Remarketing** – via the Google Display Network

#WiseWords

- Social media campaign
- Content generation for marketing activity
- Survey sent to supporters
- <https://www.eiseverywhere.com/esurvey/index.php?surveyid=46204>
- Spread the word through your own channels

Legal and Financial Advisors

- Development of behaviour change campaign based on UK research and qualitative findings
- Comms plan development by July
- Part of wider marketing activity
- Launch Include a Charity Week and continuing

Include a Charity Week Keynote Speaker Series

Dr. Russell James



- Professor in the Department of Personal Financial Planning at Texas Tech University.
- Ph.D. in consumer economics from the University of Missouri, where his dissertation was on charitable giving.
- Over 150 publications in academic journals, conference proceedings, and books.
- *The New York Times*, *The Wall Street Journal*, *CNN*, *MSNBC*, *CNBC*, *ABC News*, *U.S. News & World Report*, *USA Today*, *the Associated Press*, *Bloomberg News* and the *Chronicle of Philanthropy* and his financial neuroimaging research was profiled in *The Wall Street Journal's Smart Money Magazine*.

Two supporter opportunities

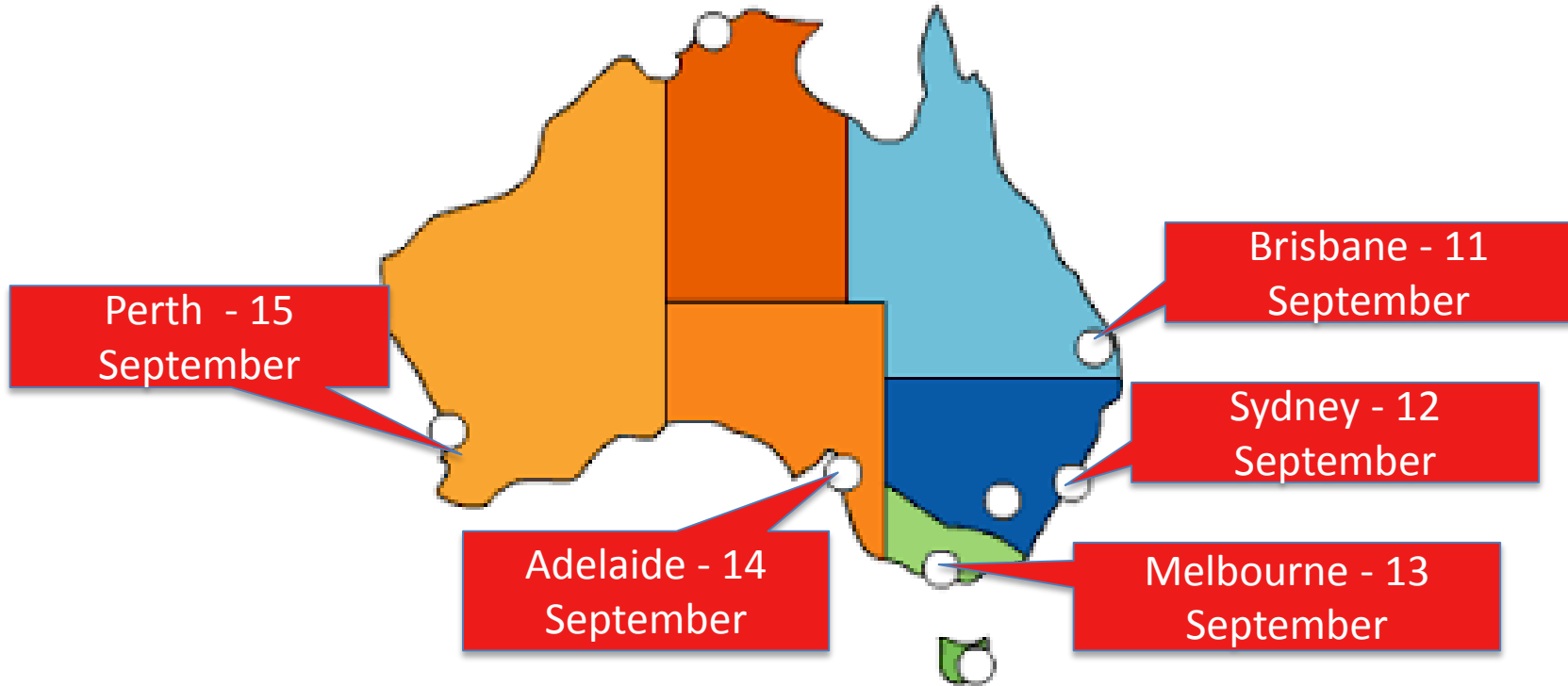
SEMINAR

Inside the mind of the gifts in wills donor: a review of neuroimaging and experimental psychology research impact legacy gift marketing (1 hour)

WORKSHOP (EXCLUSIVE TO SUPPORTERS)

The 10 amendments of Gifts in Wills Marketing (2.5/3 hours)

Include a Charity – Speaker schedule



Media

- Using Russell James, case stories and #WiseWords
- Long-lead women'/seniors publications
- Online women's/seniors publications
- Legal publications
- Philanthropy/NFP media
- Newspapers
- TV
- Metro and regional radio (talkback)



Supporter activities

The screenshot shows the Guide Dogs NSW/ACT website. At the top, there is a navigation bar with links for 'What we do', 'Education and Resources', 'Guide Dogs', 'Help Us', 'News and Events', and 'Shop'. A blue banner at the top right says 'You can help end the waiting. Donate today'. The main content area is titled 'Include A Charity' and features a video player with the text 'include a charity' overlaid. Below the video, there is a link to 'Find out more about the campaign.' and the 'include a charity' logo with the tagline 'Help the work live on.'

- ✓ Send through your case studies for PR/digital coverage
- ✓ Complete the #WiseWords survey and utilise for your campaign
- ✓ Post a link to IAC Week on your organisation's website (improves SEO)
- ✓ Schedule social media posts & plan collateral
- ✓ Reserve your seat to Keynote Speaker Series
- ✓ Utilise the handbook with links to all campaign assets to integrate with your gifts in wills marketing (will be sent out in coming days)
- ✓ Plan an internal event to help market gifts in wills to your staff, Board and volunteers
- ✓ Contact us for ideas



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THANK YOU & QUESTIONS

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