

include a charity
Help the work live on.

IAC WEBINAR SERIES

INCLUDE A CHARITY: SURVEY FOR BEQUEST LEADS

MARTIN PAUL

DIRECTOR

MORE STRATEGIC

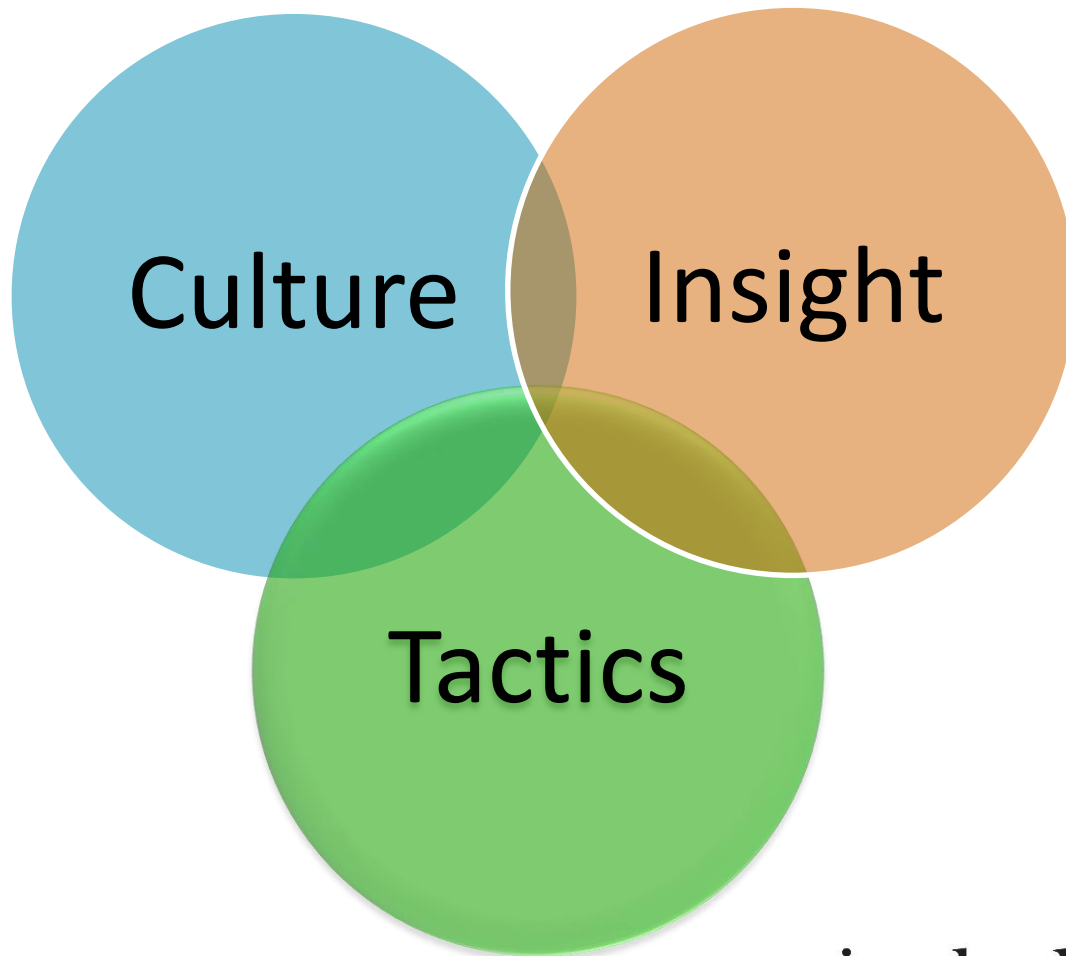


Fundraising Institute Australia

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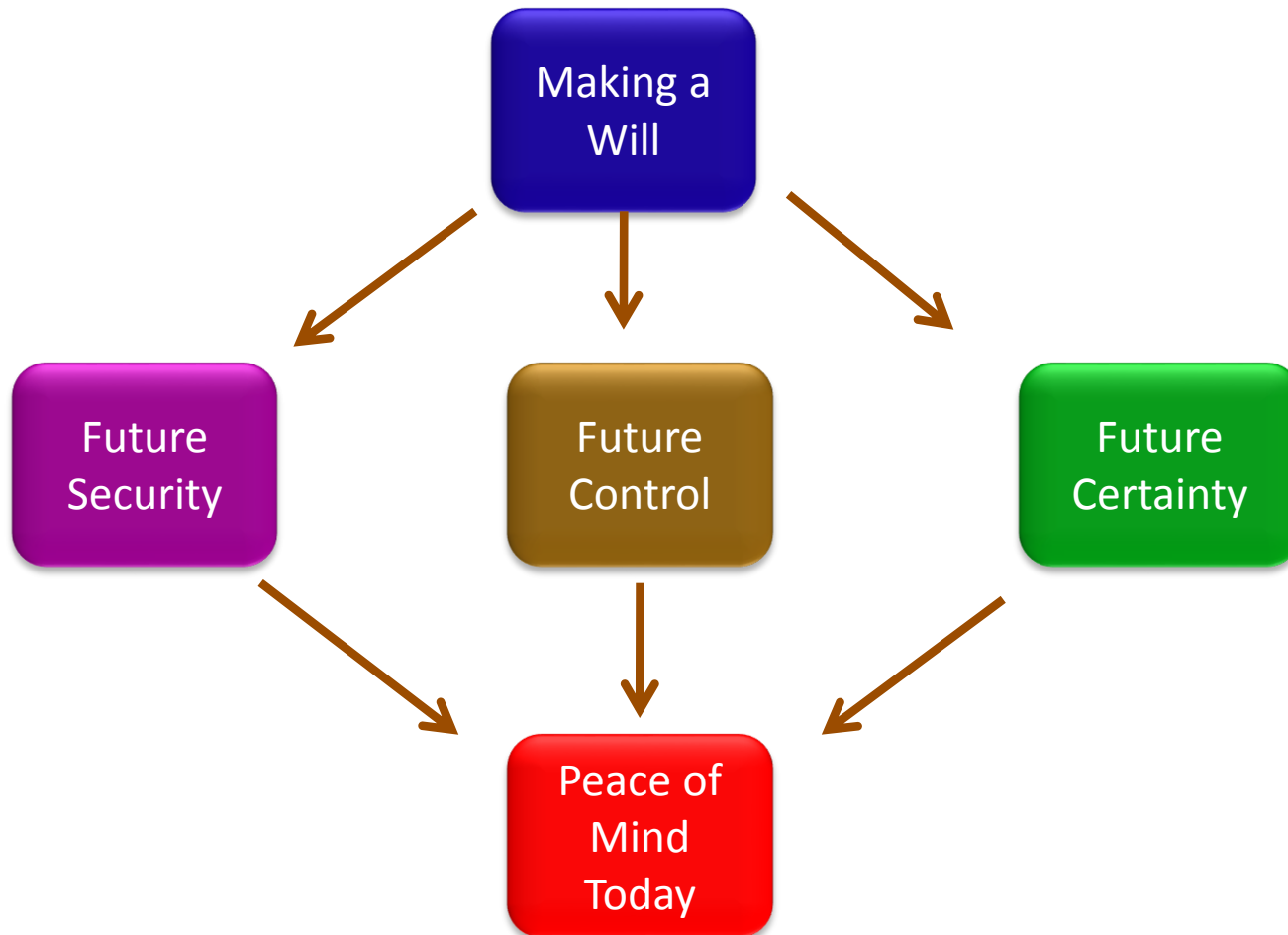
Successful Fundraising



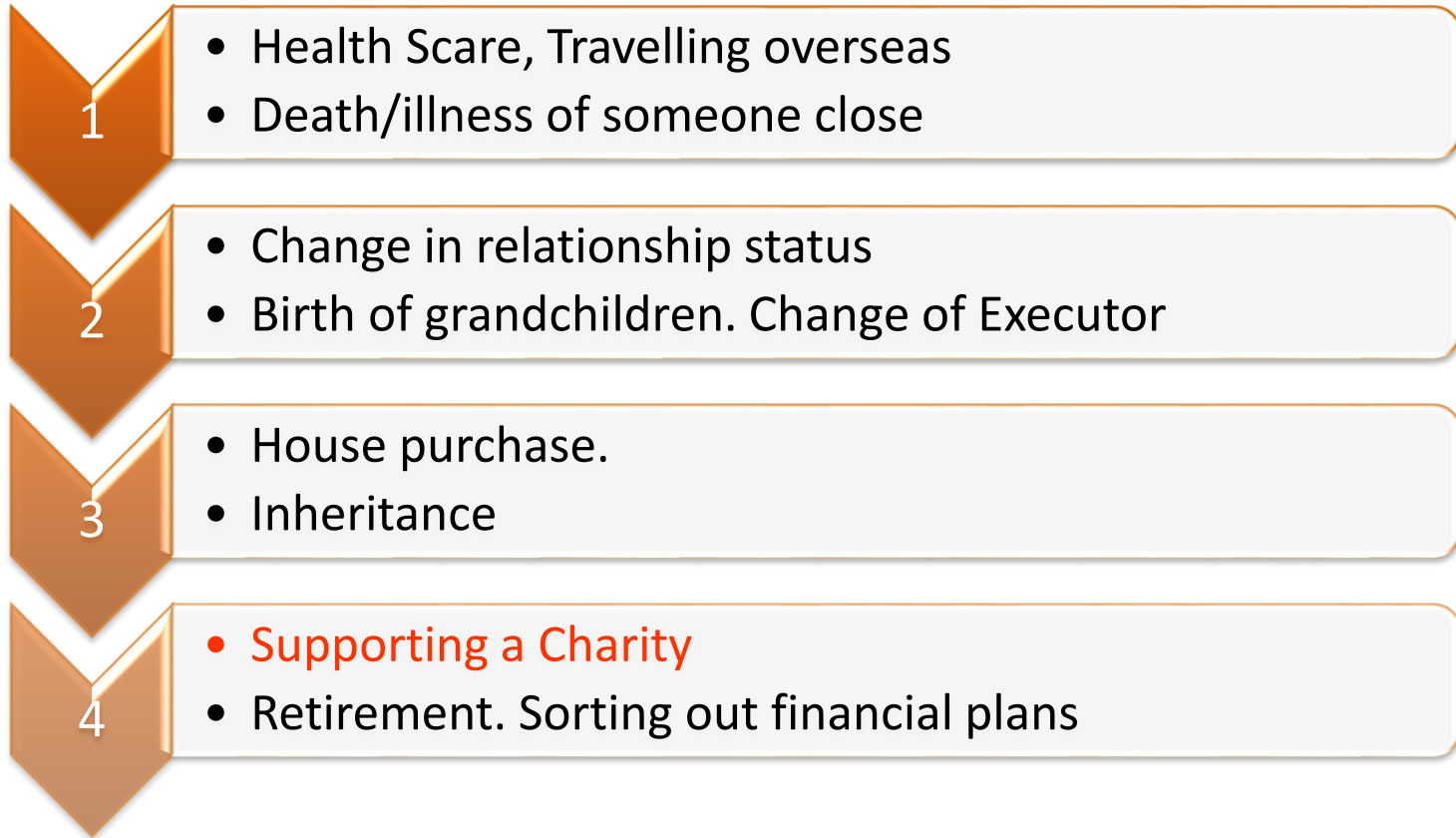
Bequest Best Practice

1. Data capture
 2. Analysis and targeting
 3. Lead generation (warm, survey, cold)
 4. Conversion (Moving from Why > How > Done)
 5. Donor care and stewardship
 6. Working with influencers
 7. Ongoing communications
 8. Promoting a positive Internal culture
 9. Measurement of success
-

Motivators to make a will



Triggers



They can happen anytime, so we must always be promoting

Bequest Surveys



UNHCR
United Nations
Australia for UNHCR

Your Experience with Australia for UNHCR

It is really important for us to understand more about your experience as a supporter, how clearly we want to be more effective, and help you determine about our work.

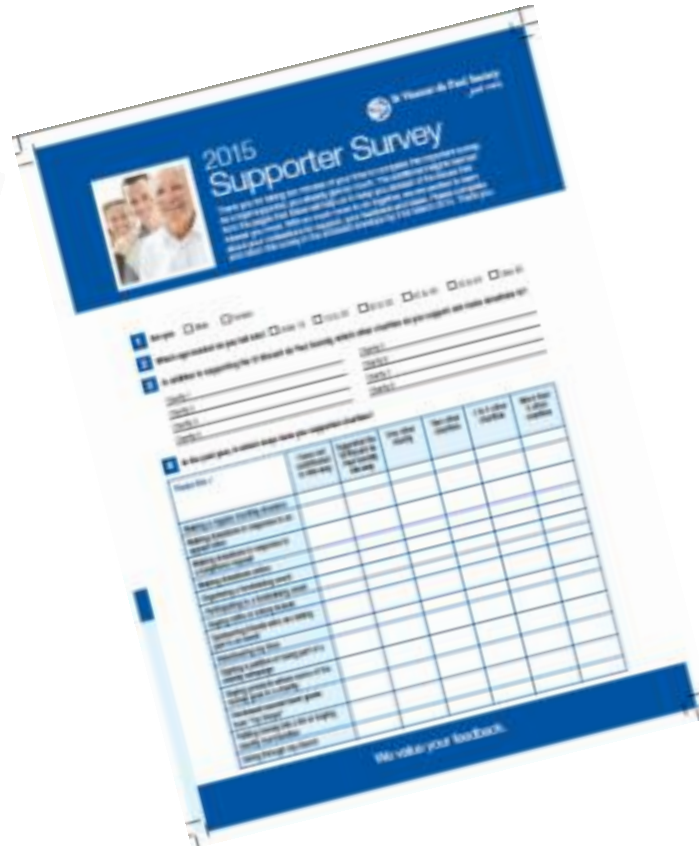
If a friend was thinking to make a donation to a charity and asked for your advice, how clearly would you be to recommend Australia for UNHCR as an organization worthy of support?

Strongly, likely: 1 2 3 4 5 6 7 8 9 10

The next two questions may appear very similar, in the first question we want to know how important submitting is to you, in the other how satisfied you are.

The rank of the statements below, please rate how important each is with regard to your support for Australia for UNHCR.

Statement	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
Improving our identity, name & logo	1	2	3	4	5
Our ability to attract our other supporters	1	2	3	4	5
Offering our other people a more comprehensive service	1	2	3	4	5
Providing the information	1	2	3	4	5
Recognizing the contribution of those in our past	1	2	3	4	5
Communicating to us the feedback we receive from our supporters	1	2	3	4	5



2015 Supporter Survey

Thank you for taking an interest in our work and helping us improve our support for children's cancer research. Your feedback is important to us and will help us to better understand your needs and how we can best support you. We will use your feedback to improve our services and to ensure we are meeting your needs.

1. Name: _____

2. Email: _____

3. How long have you been a supporter? Less than 1 year 1-2 years 3-5 years 6-10 years More than 10 years

4. How often do you donate? Once Twice Three times More than three times

5. How often do you volunteer? Once Twice Three times More than three times

6. How often do you attend events? Once Twice Three times More than three times

Statement	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
Being able to donate online	1	2	3	4	5
Being able to donate by direct debit	1	2	3	4	5
Being able to donate by cheque	1	2	3	4	5
Being able to donate by credit card	1	2	3	4	5
Being able to donate by bank transfer	1	2	3	4	5
Being able to donate by cash	1	2	3	4	5
Being able to donate by standing order	1	2	3	4	5
Being able to donate by mobile phone	1	2	3	4	5
Being able to donate by text message	1	2	3	4	5
Being able to donate by social media	1	2	3	4	5
Being able to donate by email	1	2	3	4	5
Being able to donate by phone	1	2	3	4	5
Being able to donate by post	1	2	3	4	5
Being able to donate by any other method	1	2	3	4	5

We value your feedback.



Adding depth



Donor Type

Value

Longevity

Behaviour

UNHCR
Your Experience with AUSAIDA for UNHCR
It is a great pleasure for us to share your views about your experience as a volunteer or partner of AUSAIDA for UNHCR. Your feedback will help us improve our work.

1 2 3 4 5
Strongly disagree Disagree Neutral Agree Strongly agree

1. How satisfied are you with the quality of the support provided by AUSAIDA for UNHCR?
2. How satisfied are you with the quantity of the support provided by AUSAIDA for UNHCR?
3. How satisfied are you with the timeliness of the support provided by AUSAIDA for UNHCR?
4. How satisfied are you with the effectiveness of the support provided by AUSAIDA for UNHCR?
5. How satisfied are you with the overall support provided by AUSAIDA for UNHCR?

6. How satisfied are you with the communication and information provided by AUSAIDA for UNHCR?
7. How satisfied are you with the training and capacity building provided by AUSAIDA for UNHCR?
8. How satisfied are you with the financial support provided by AUSAIDA for UNHCR?
9. How satisfied are you with the technical support provided by AUSAIDA for UNHCR?
10. How satisfied are you with the administrative support provided by AUSAIDA for UNHCR?

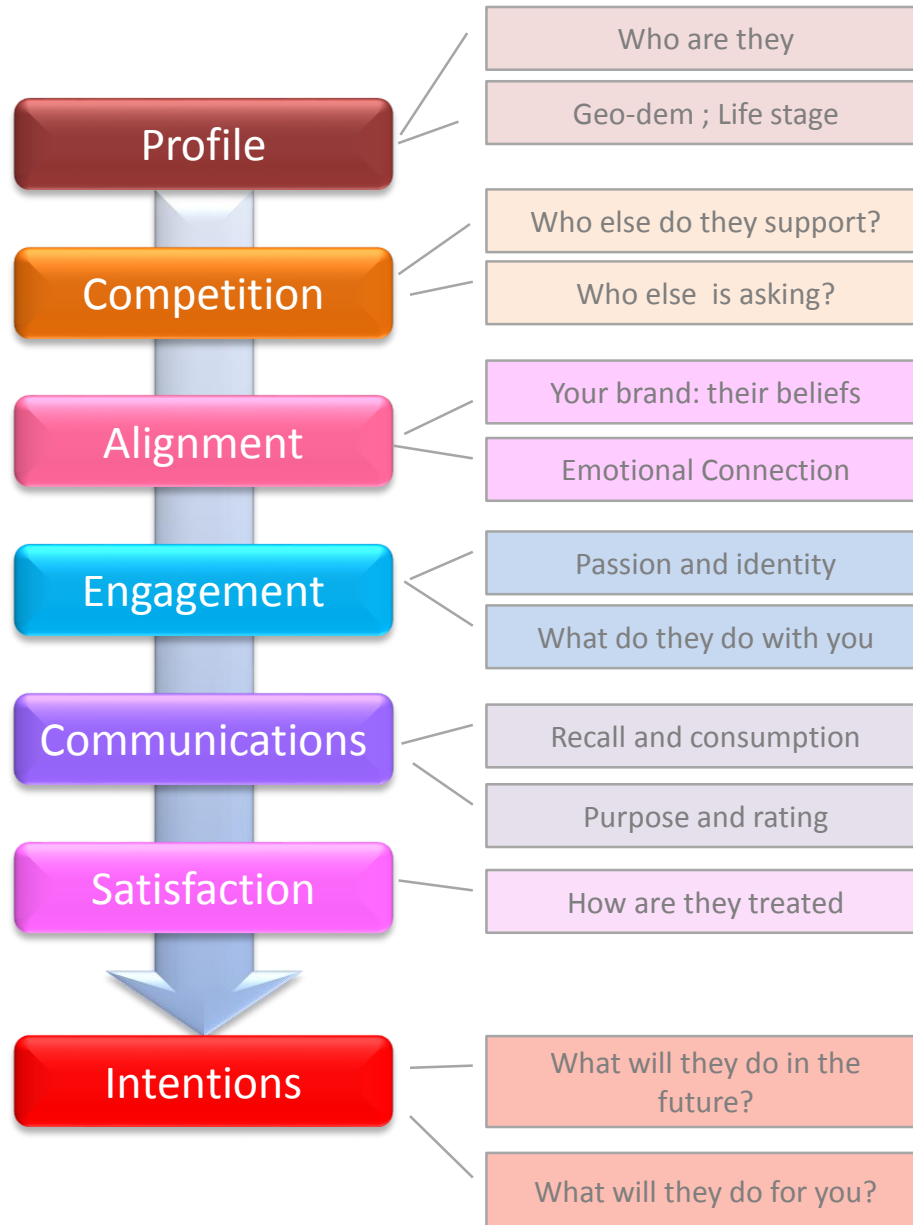
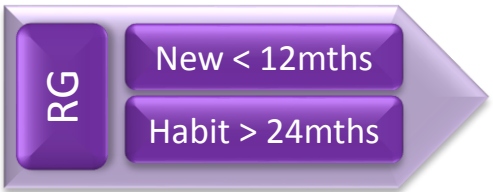
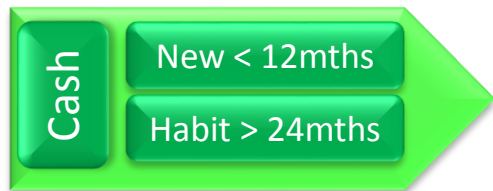
2015 Supporter Survey
Thank you for your support of the Australian Red Cross. We would like to hear from you about your experience with us. Your feedback will help us improve our work.

1 2 3 4 5
Strongly disagree Disagree Neutral Agree Strongly agree

1. How satisfied are you with the quality of the support provided by the Australian Red Cross?
2. How satisfied are you with the quantity of the support provided by the Australian Red Cross?
3. How satisfied are you with the timeliness of the support provided by the Australian Red Cross?
4. How satisfied are you with the effectiveness of the support provided by the Australian Red Cross?
5. How satisfied are you with the overall support provided by the Australian Red Cross?

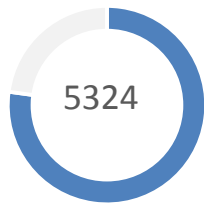
6. How satisfied are you with the communication and information provided by the Australian Red Cross?
7. How satisfied are you with the training and capacity building provided by the Australian Red Cross?
8. How satisfied are you with the financial support provided by the Australian Red Cross?
9. How satisfied are you with the technical support provided by the Australian Red Cross?
10. How satisfied are you with the administrative support provided by the Australian Red Cross?



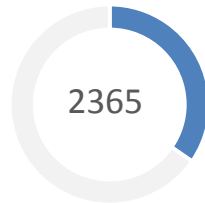


8,314 Donors

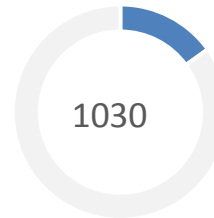
Appeal Donors



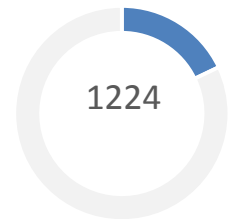
Regular Giving



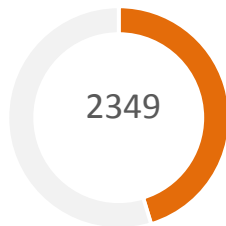
Face to face



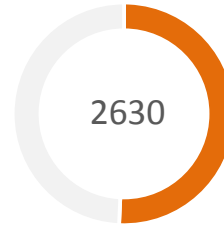
RG+Cash



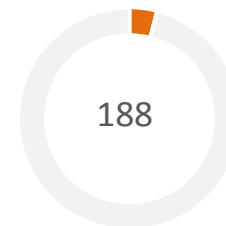
Low Value (<\$100)



Medium Value (\$100 to \$1000)



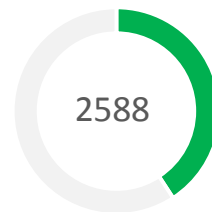
High Value (\$1,000+)



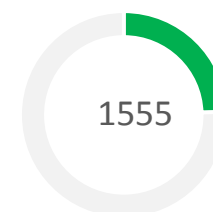
New (Under 2 years)



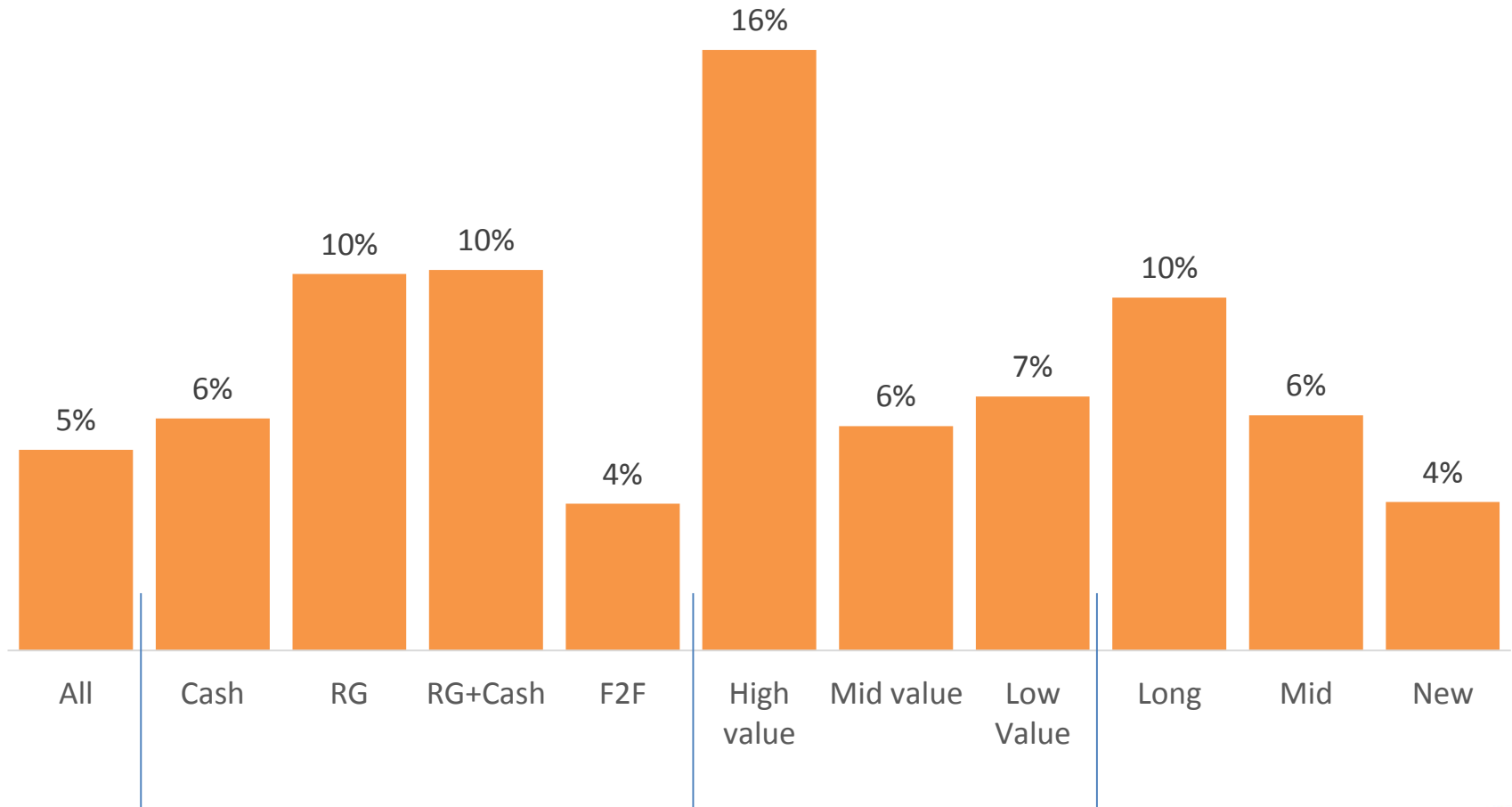
Medium (3 to 7 years)



Long (7 years+)



Survey Response Rates



Q14. Supporting The Wayside Chapel In Other Ways

With so many people in need of our help we are interested in whether you would consider supporting Wayside Chapel in other ways.

Many people have chosen to nominate The Wayside Chapel in their Will after they have made provision for their family and loved ones. This is one of the most significant ways you can make a lasting impact to support the work of Wayside. Have you included The Wayside Chapel in your Will?

- Yes, I have already included The Wayside Chapel in my Will
- I intend to include The Wayside Chapel in my Will when I next update it
- I am considering including The Wayside Chapel in my Will
- I am not able to include The Wayside Chapel in my Will at this time

Normalise

Acknowledge

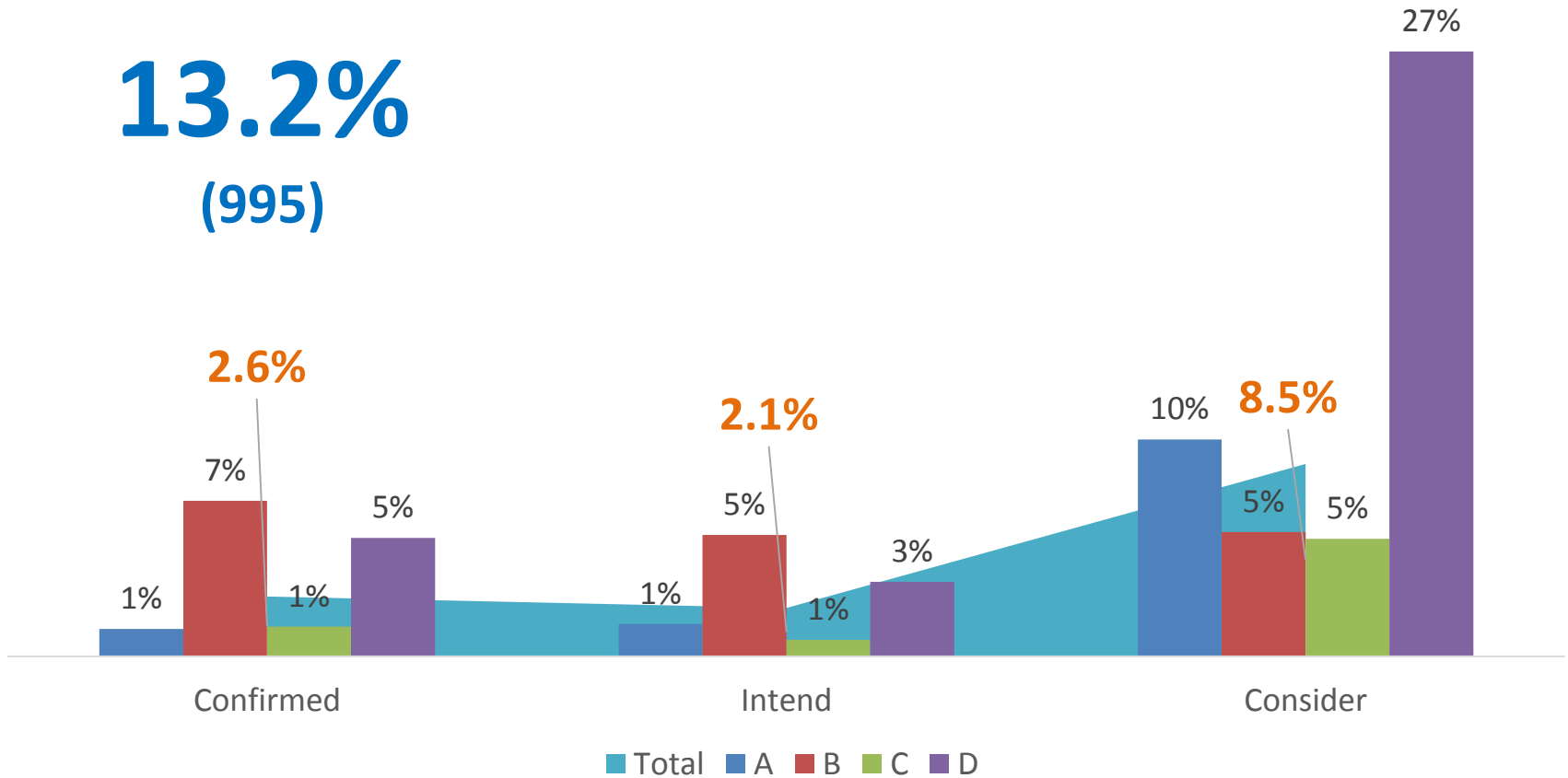
Reason

Classification

Bequest Response Rates by charity

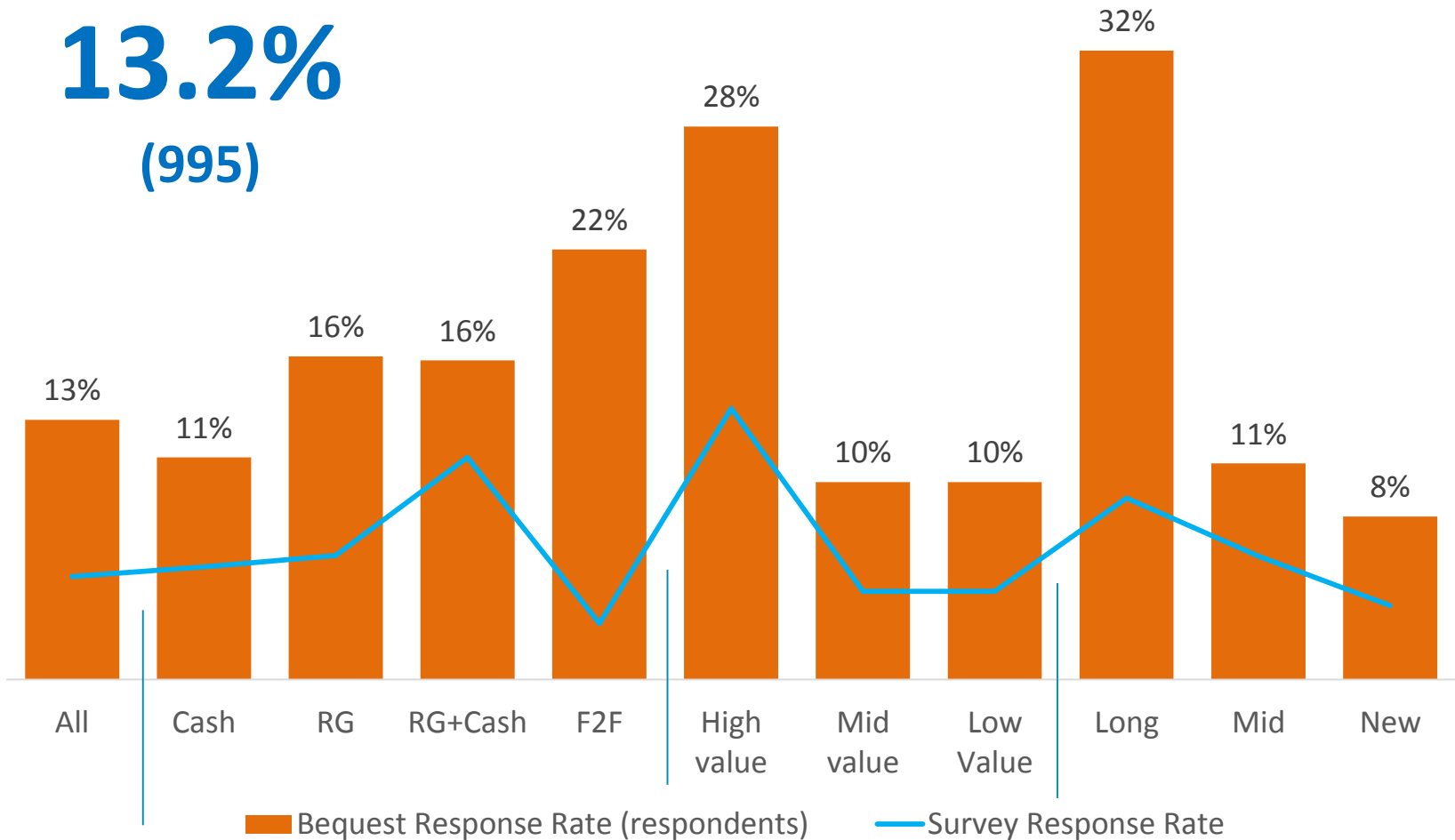
Bequest Leads as % of respondents

13.2%
(995)



Bequest Response Rates by type

13.2%
(995)



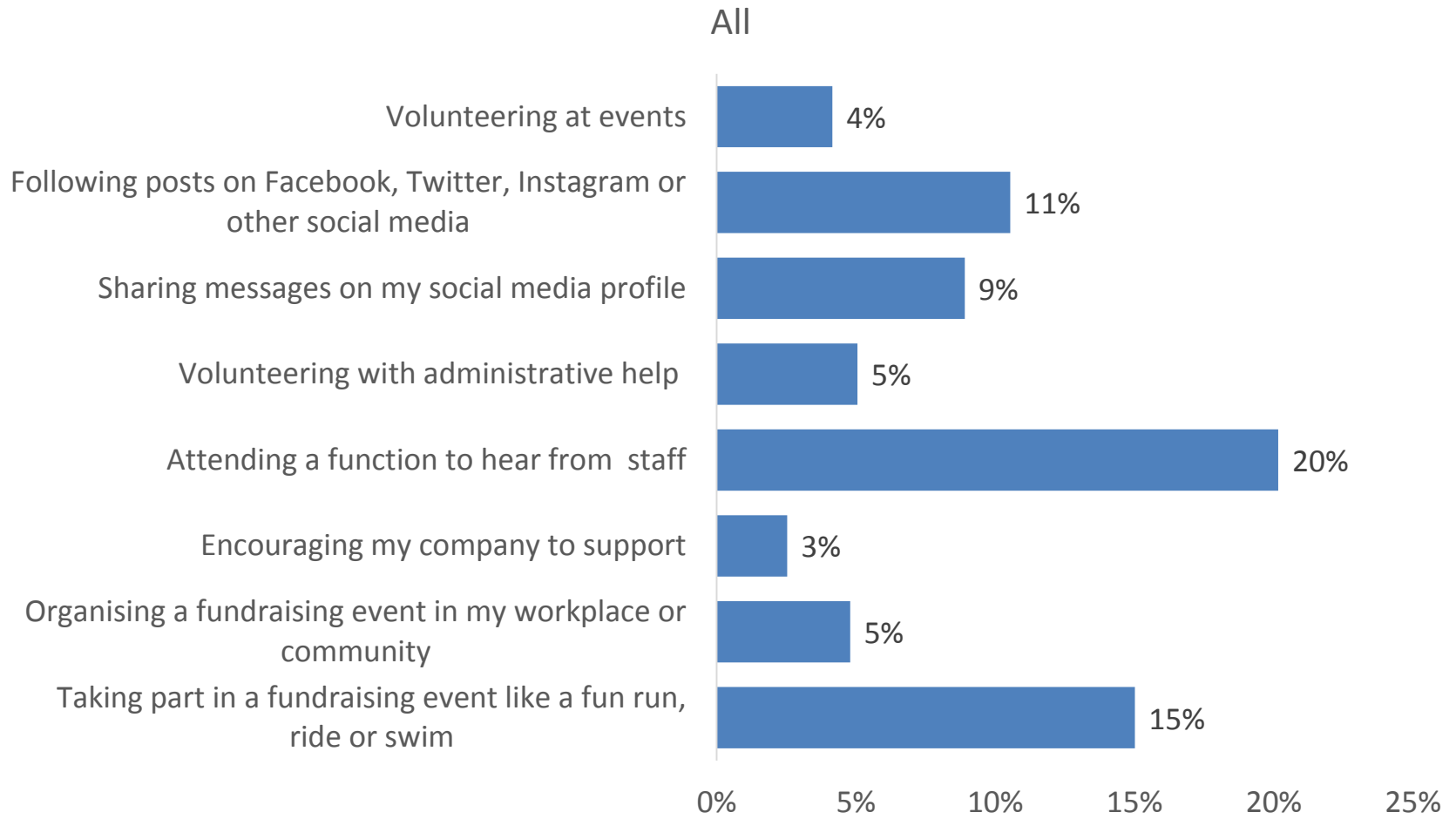
Other Extensions

- 13.** In a serious refugee crisis, would you be willing to consider an exceptional gift of \$5,000 or more?
- Yes, I would be willing to consider making a significant donation
 - Possibly. Please send me more information at the time
 - No, unfortunately I am not able to make a significant contribution at present

In which of the following ways would you be interested in becoming more involved with the St Vincent de Paul Society? Please select all that apply.

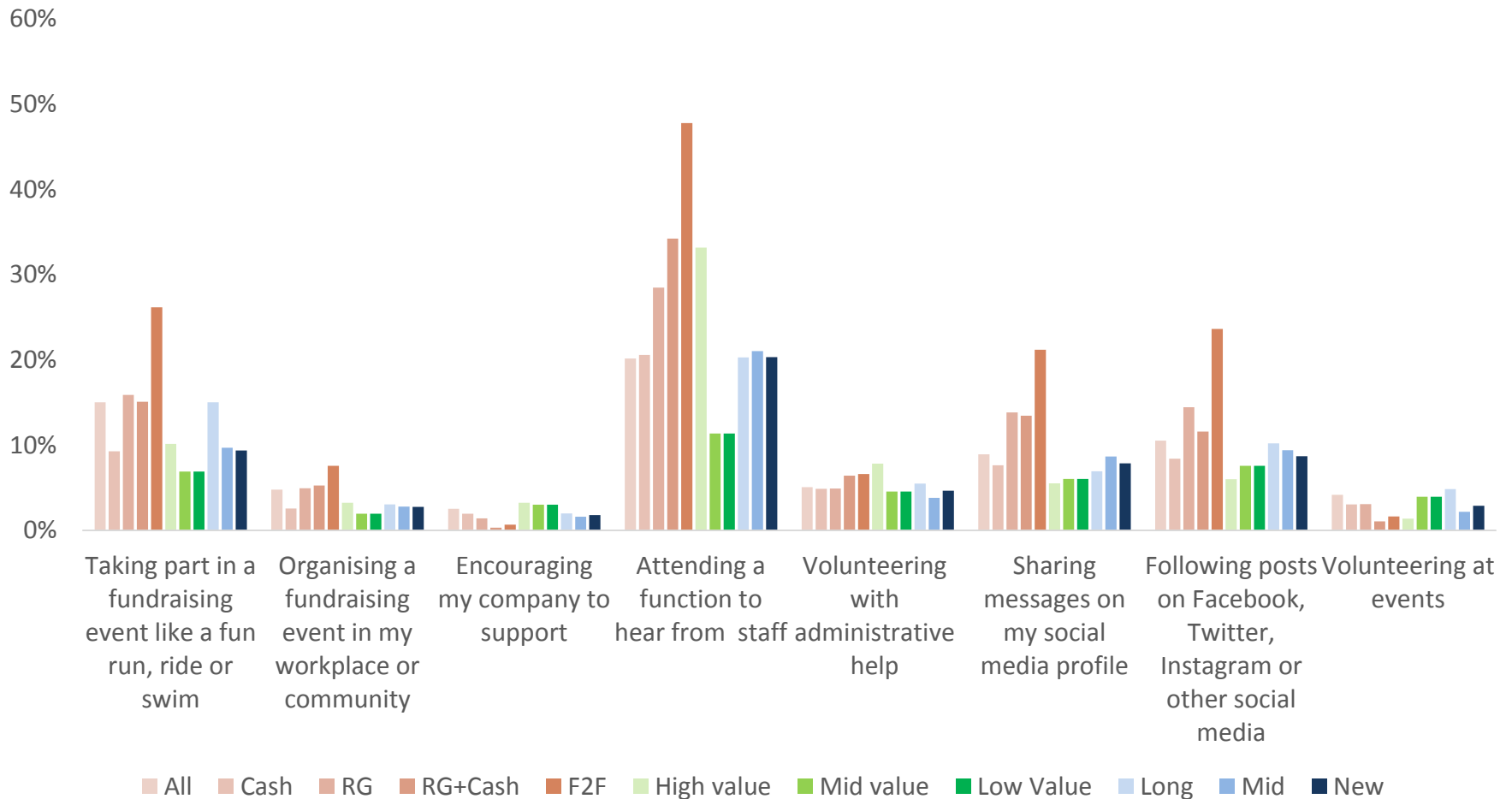
- Taking part in a fundraising event like a local fun run, ride or swim
- Taking part in an overseas fundraising trek or ride
- Organising a fundraising event in my workplace, church or community
- Giving "alternative charitable gifts" for Christmas or birthdays
- Sharing and following posts on Facebook, Twitter, Instagram or other social media
- Volunteering in my local community
- Helping with a doorknock or street collection in my local area
- Making a regular monthly donation
- Taking part in a Community "Sleepout"
- Influencing others to support an important project

Extending supporters



Extension by value longevity and type

Chart Title



Extending supporters

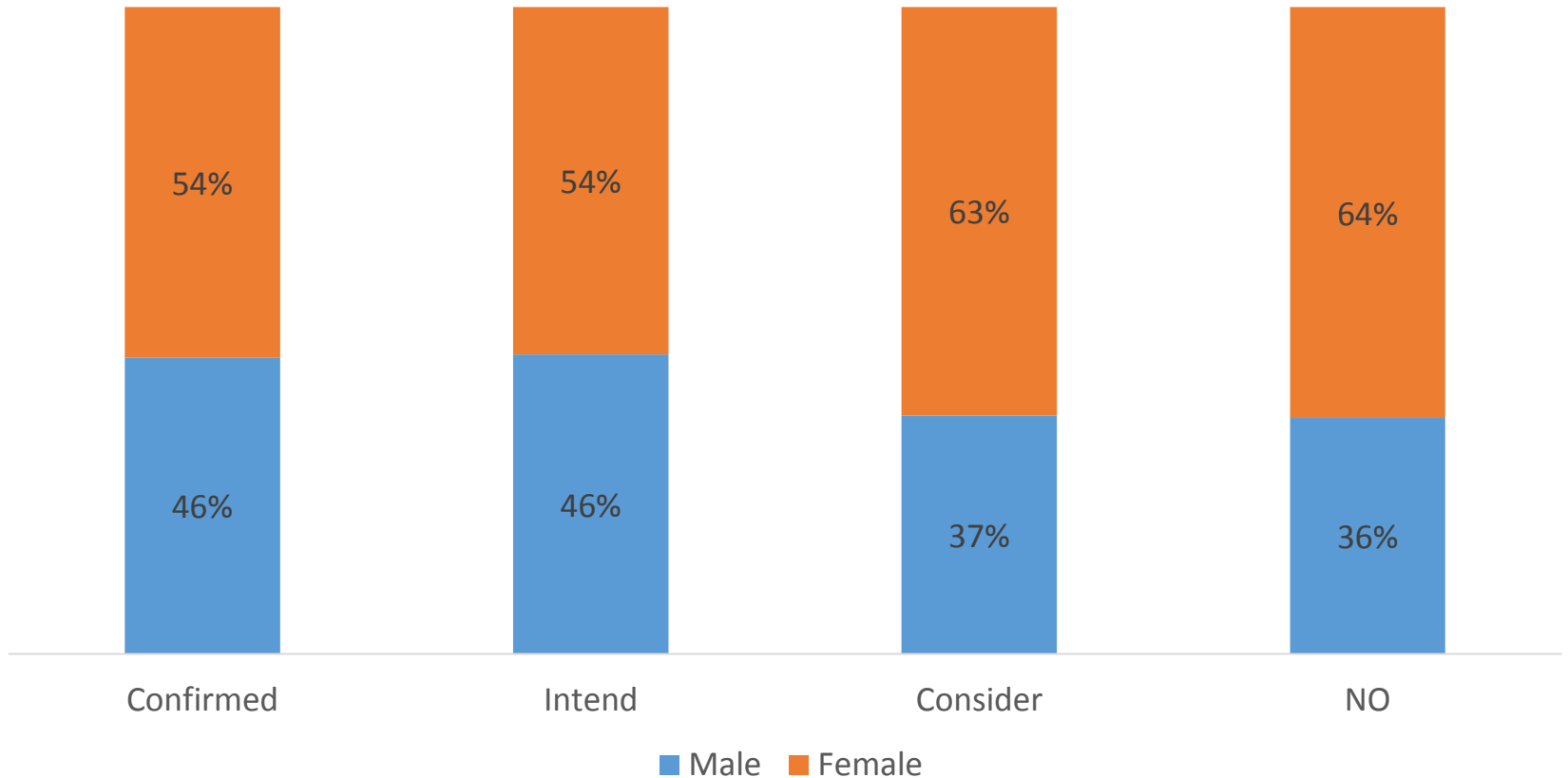
- 198** confirmed bequestors
 - 160** intending bequestors
 - 637** considering a bequest
 - 41** new major donors
 - 203** prospective major donors
 - 848** event fundraisers
 - 240** community fundraising organisers
 - 1087** potential alternative gift buyers
 - 2,155** engaged donors making comments
-

Understanding Donors

1. Are they who we think they are?
2. What are they like?
3. What do they think of us?
4. Are they satisfied?
5. Are they engaged?
6. What do they think of our communications?

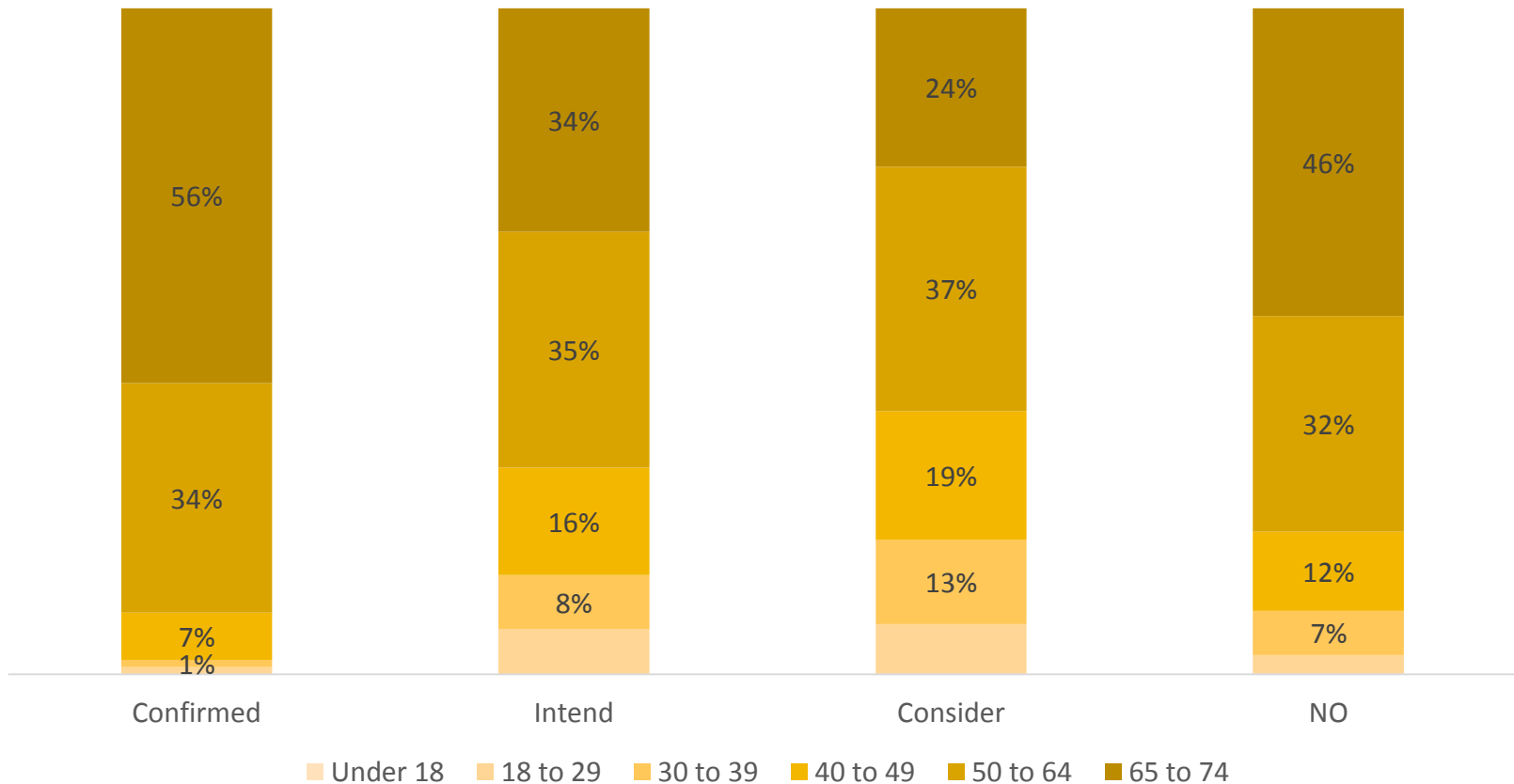
Understanding Donors

Bequest response by gender



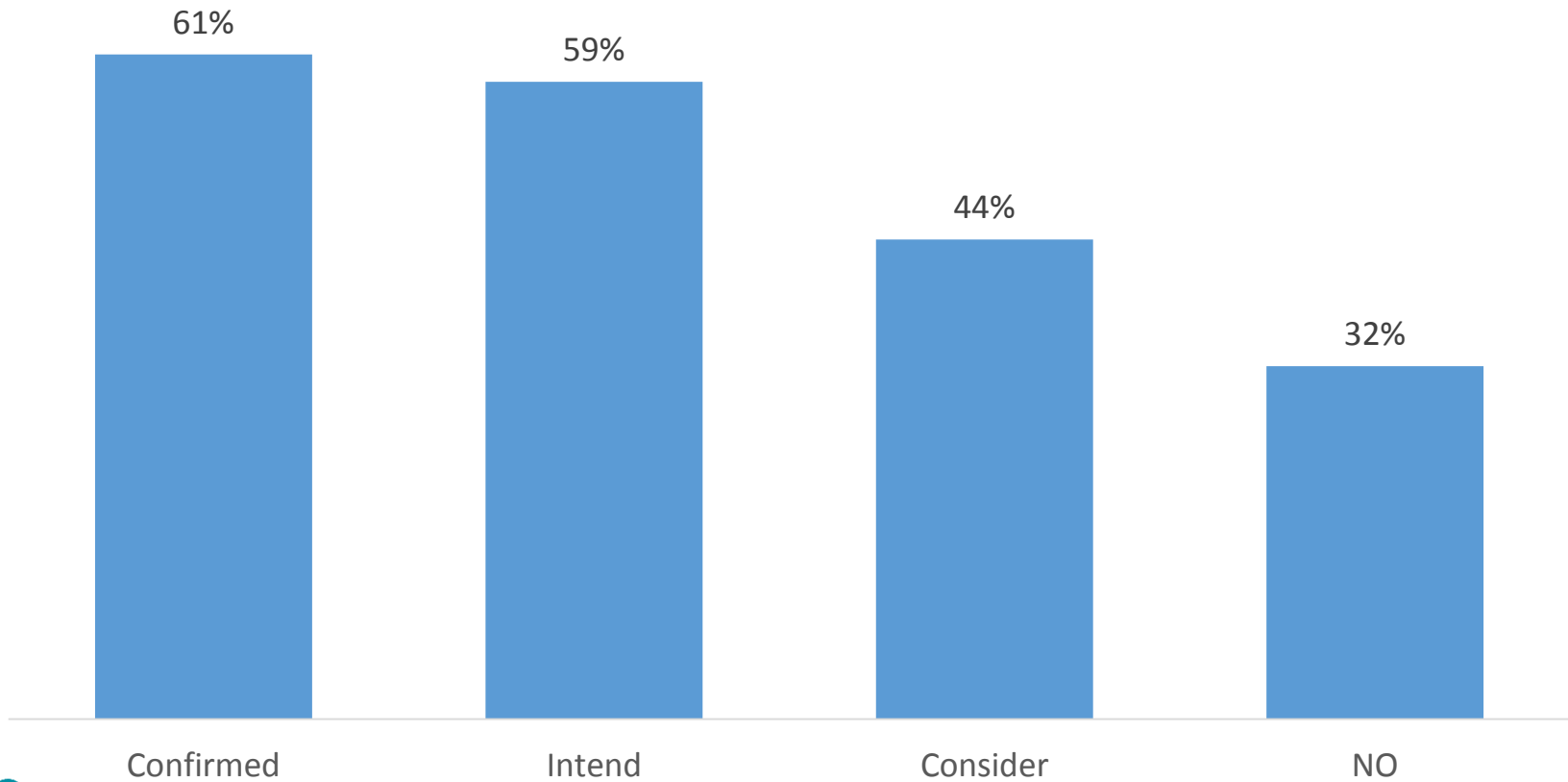
Understanding Donors

Bequest response by Age



Understanding Donors

Giving to them is an important part of who I am



Net Endorser Score

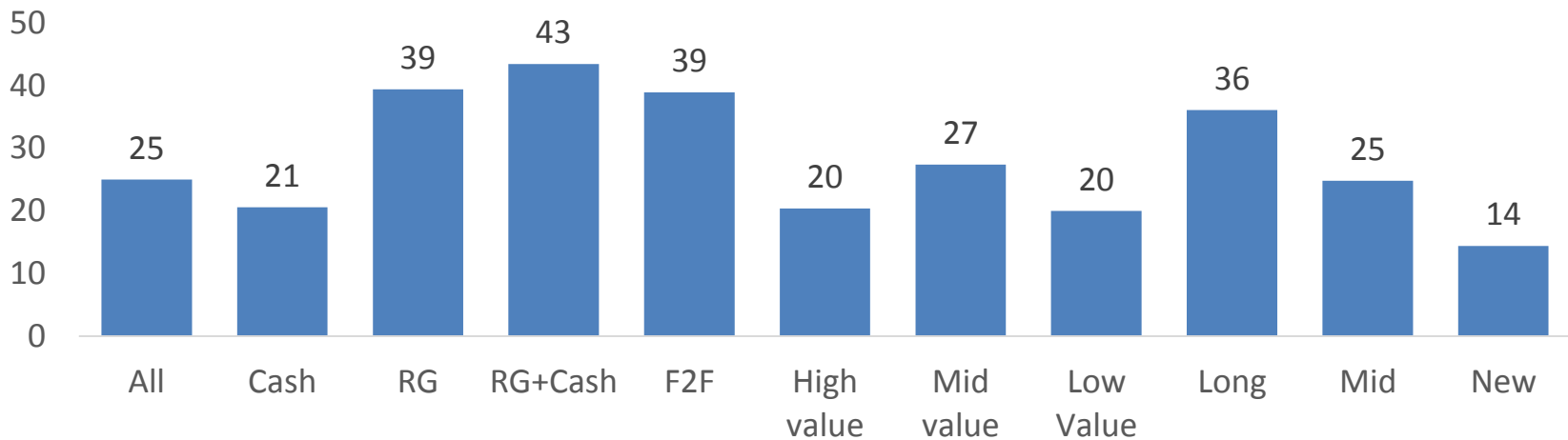
If a friend was looking to make a donation to a charity and asked for your advice, how likely would you be to recommend the St Vincent de Paul Society as a charity worthy of support?

Unlikely

Extremely Likely

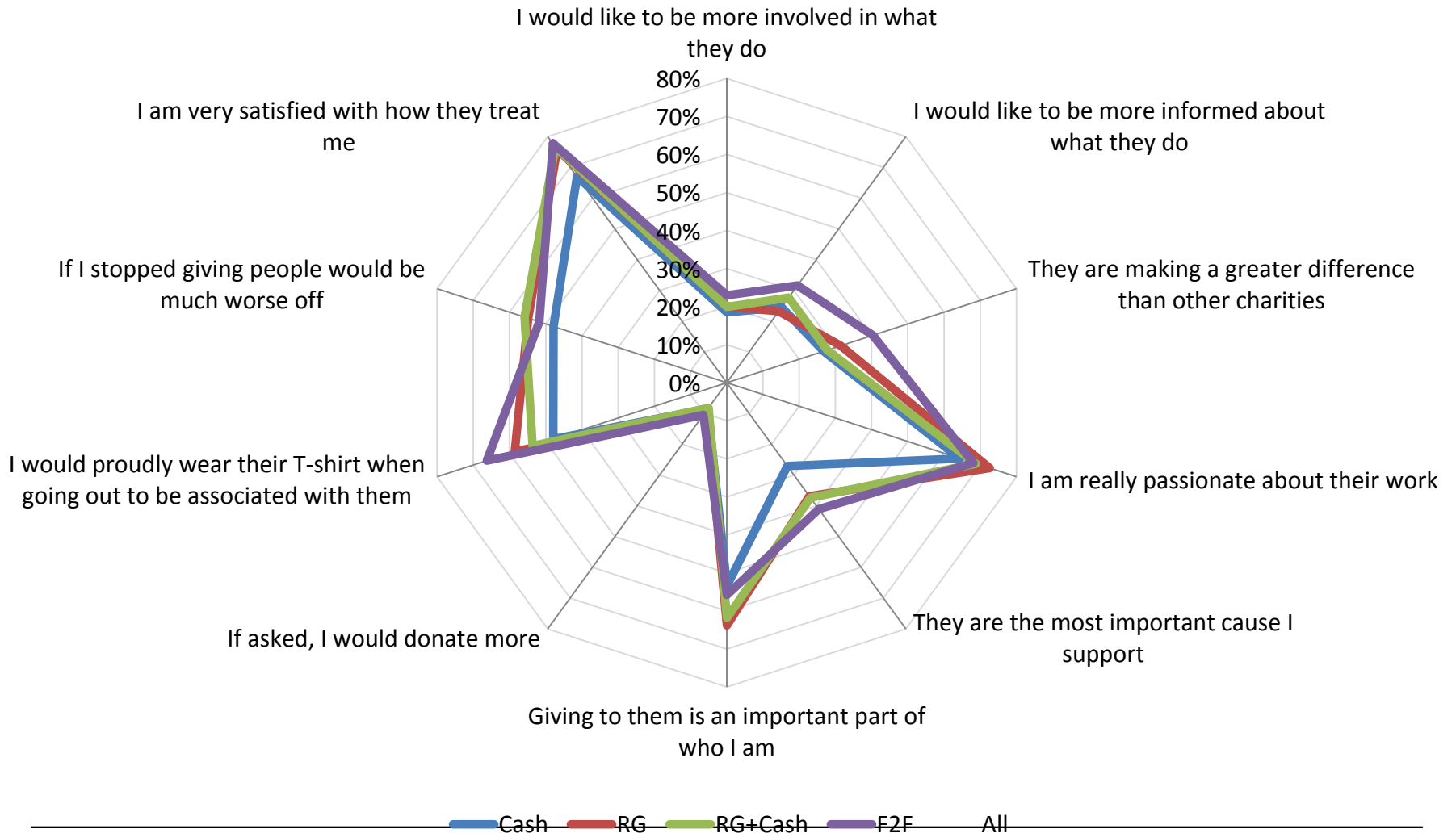


Net Promoter Score



Engagement Elements

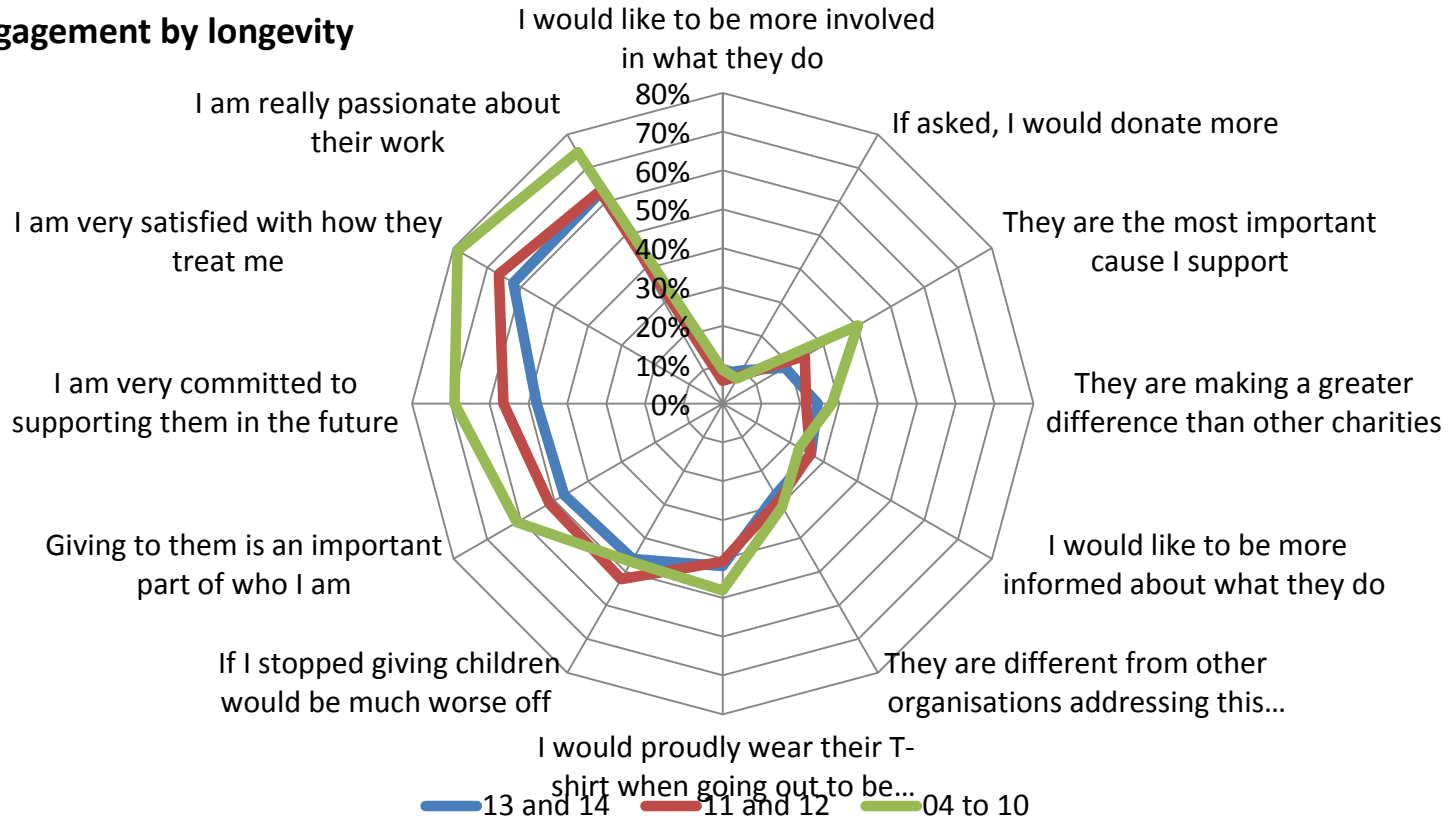
By Donor Type (average)



Sample =

Engagement by longevity

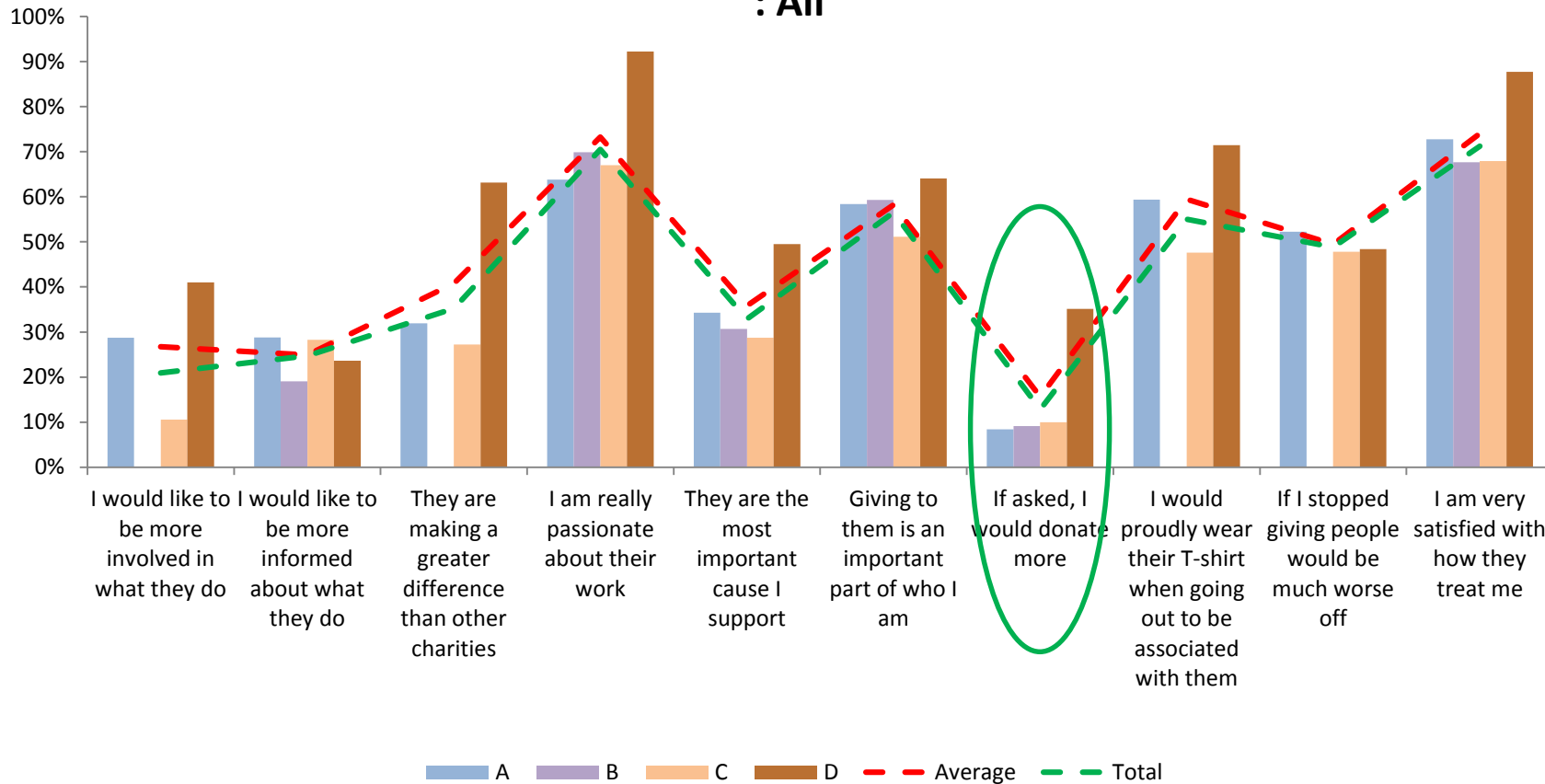
Engagement by longevity



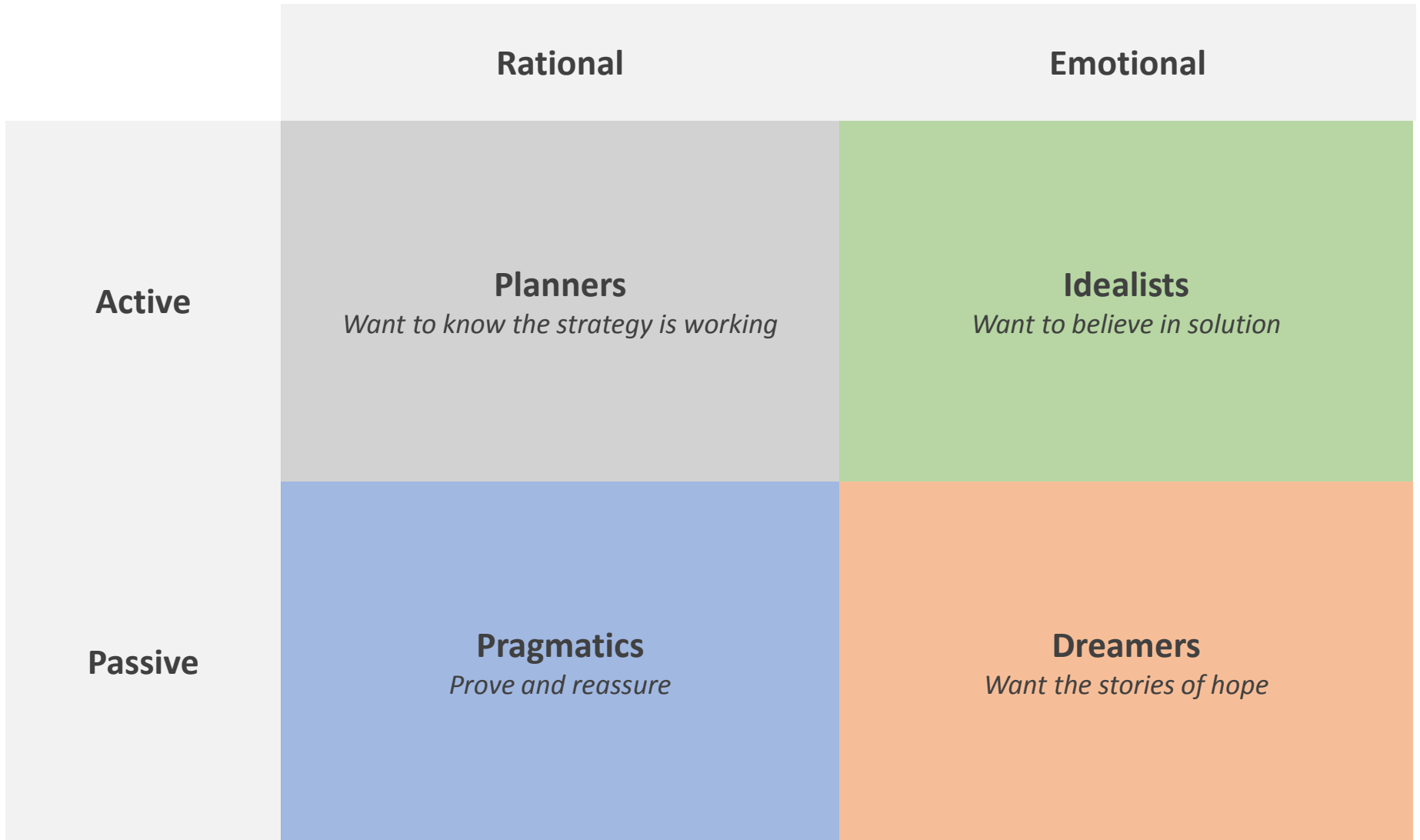
Longer standing supporters are more engaged on most measures

Thinking about your support for charity X would you agree or disagree with the following statements?

: All

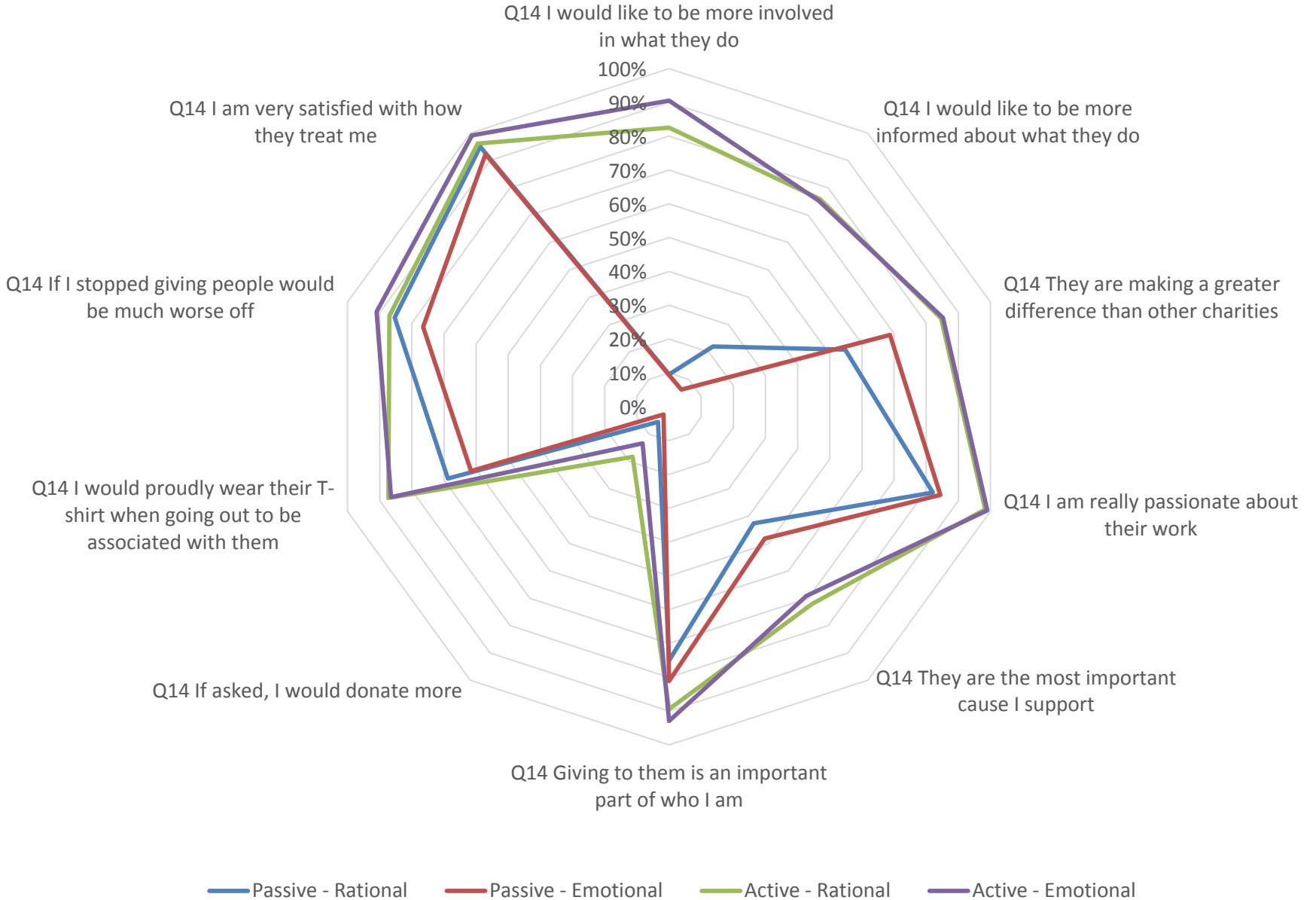


Your supporters are more engaged and willing to do more than other charity supporters



Re – expressed by Martin

Engagement



include a charity
Help the work live on.

QUESTIONS?

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include a charity
Help the work live on.

THANK YOU

MARTIN PAUL

DIRECTOR

MORE STRATEGIC

NEXT IAC WEBINAR: 9 DECEMBER

INCLUDE A CHARITY: LEGAL ENGAGEMENT TOOLKIT
ROSS ANDERSON MFIA, NATIONAL GIFTS IN WILLS MANAGER,
NATIONAL STROKE FOUNDATION

FOR MORE INFORMATION AND TO REGISTER VISIT WWW.FIA.ORG.AU/IAC

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GO MAKE A
DIFFERENCE

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Fundraising Institute Australia