



# Say *hello* to Donor Republic



At the *heart*  
of fundraising



**INCLUDE  
A CHARITY**  
Make your mark

**Making the case for investment**



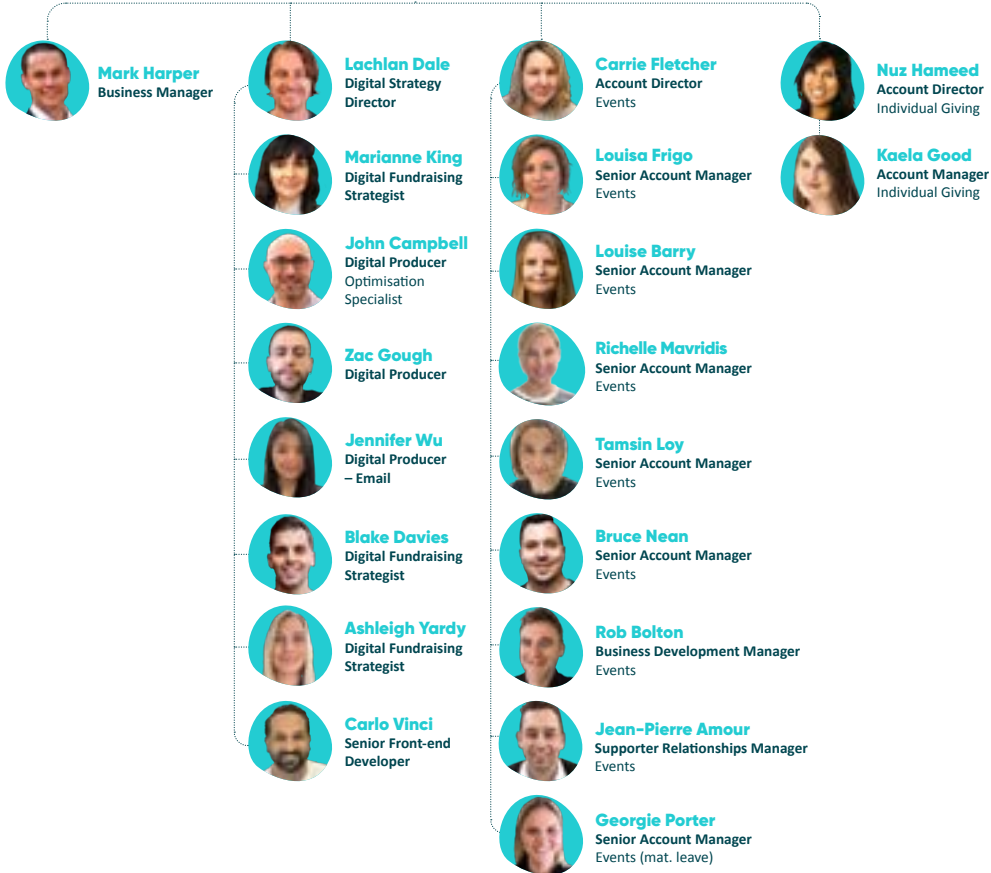
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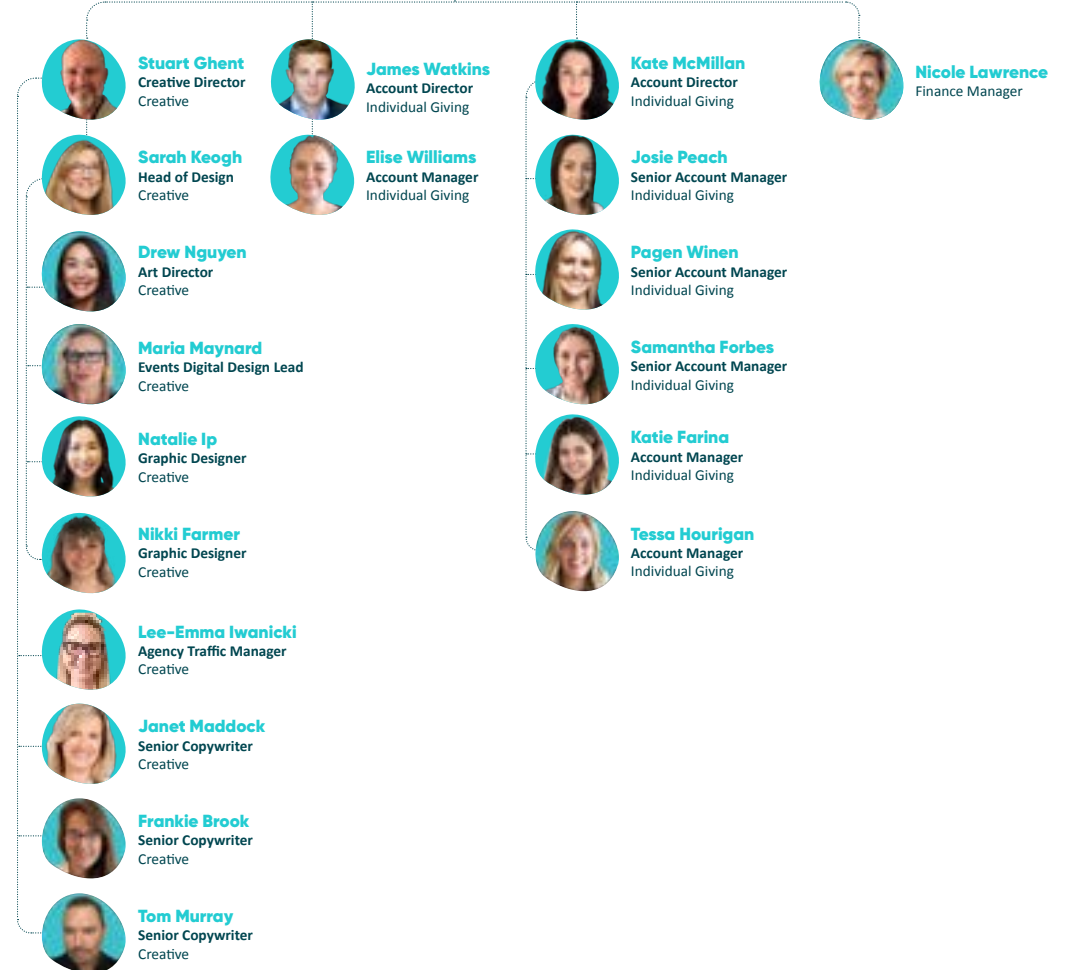
# Meet the Team



**Marcus Blease**  
Director



**Andrew Sabatino**  
Director





## Gifts in Wills



## What we're going to cover

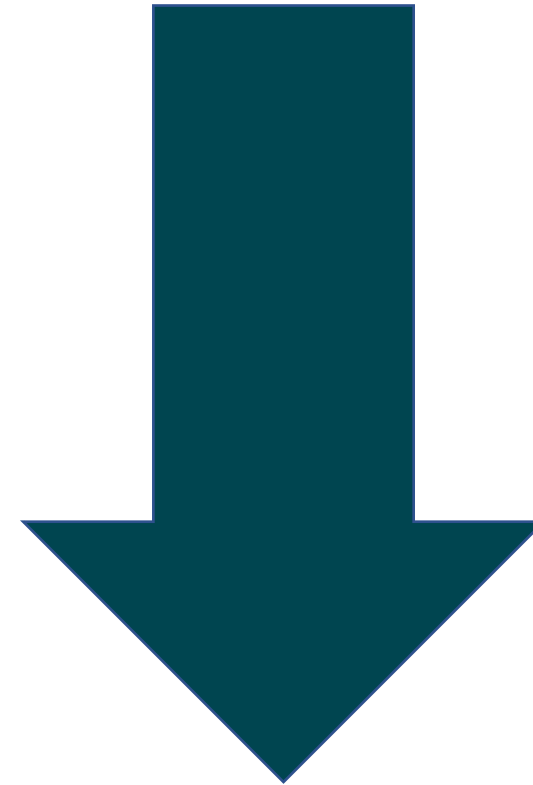
1. Detail the landscape and opportunity
2. Understand your organisation's performance
3. Develop a plan to understand what you want to invest in
4. Educate internal key stakeholders
5. Measure & report on success
6. Process summary.



We've all experienced this



First area to  
have the  
budget  
increased



First area to  
have expenses  
decreased

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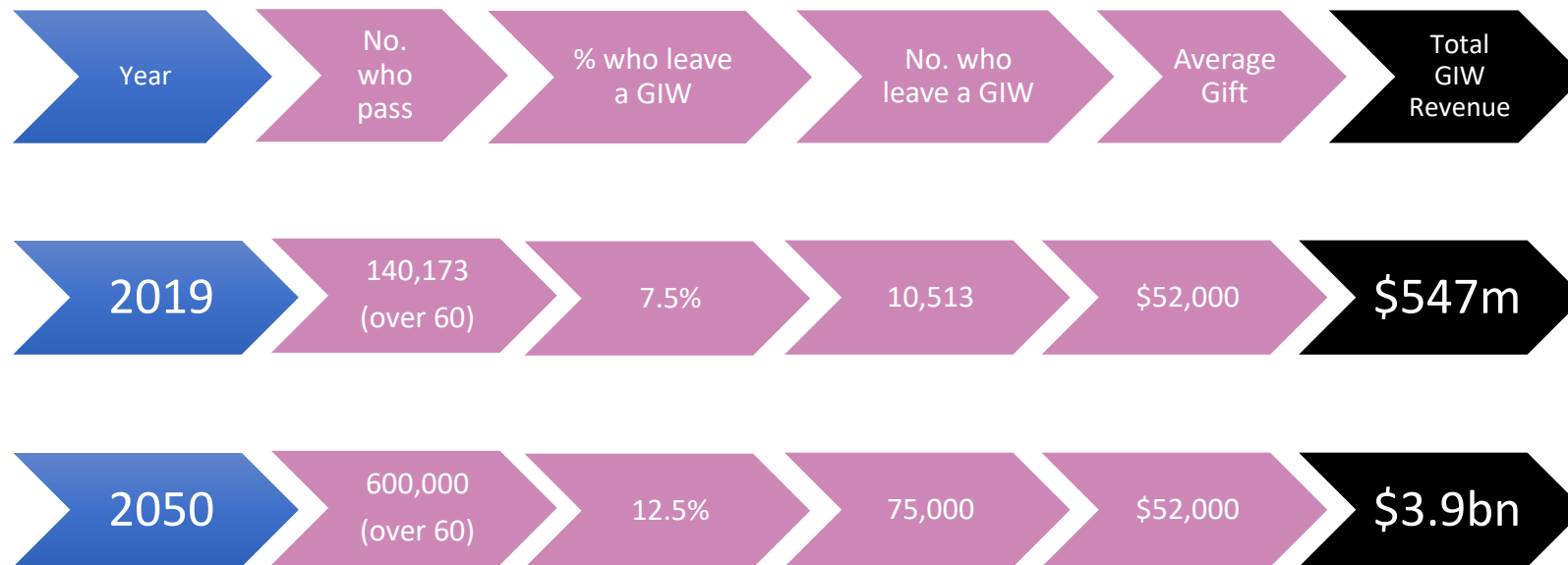
# 1. Detail the landscape & opportunity

Stronger  
*together*



# Growth Potential

Research estimates that currently there are 7.5% Australian's who on their passing leave a gift in their Will. This means there are 10,513 Australians passing away each year leaving an average gift of \$52,000. Combined this means there is \$547m left to the sector annually. Over the coming decades this is set to significantly grow with the boomer generation passing.



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## Growth Potential



23%



8%



## Growth Potential

Children

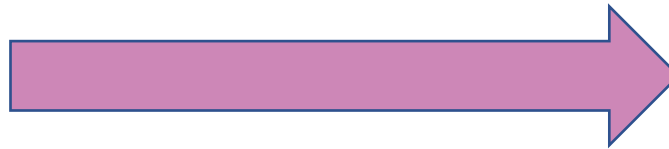
4%



No children

30%

\$89K

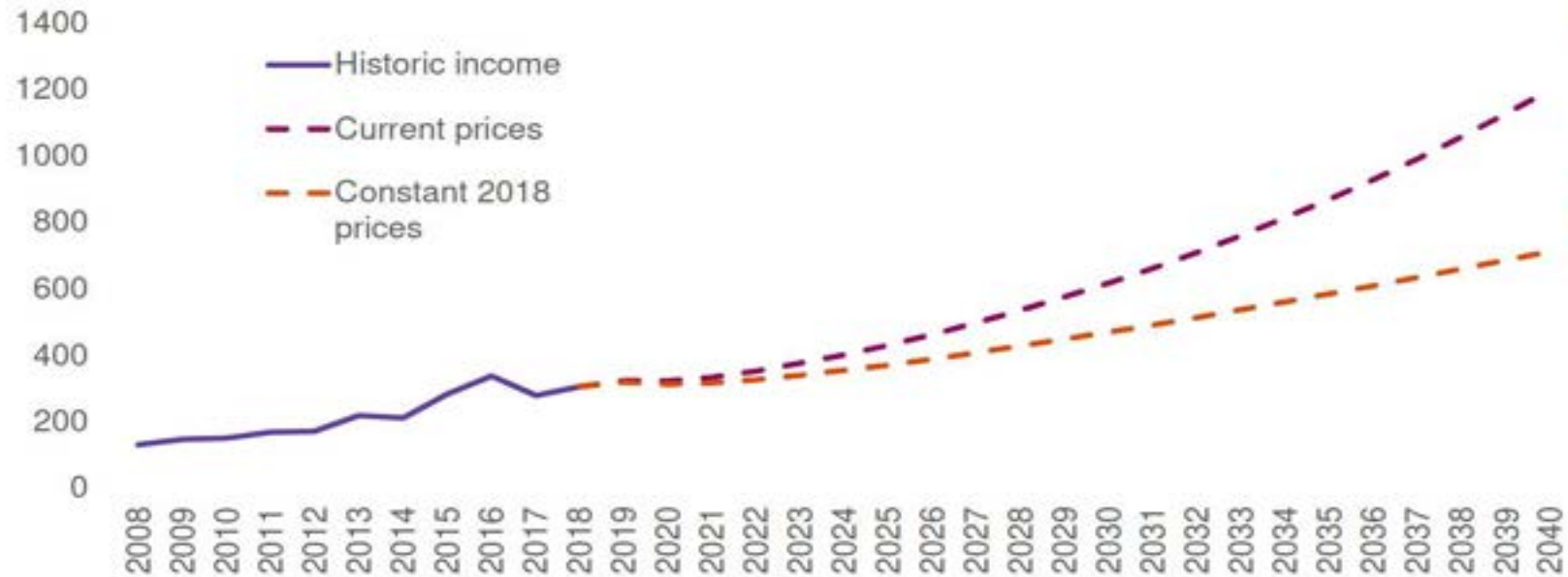


\$260K

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# Legacy Monitor future projections

Bequest income forecasts, 2018 – 2040, \$m



Nominal growth  
**6.5%**  
p.a.

Real growth  
**4.1%**  
p.a.

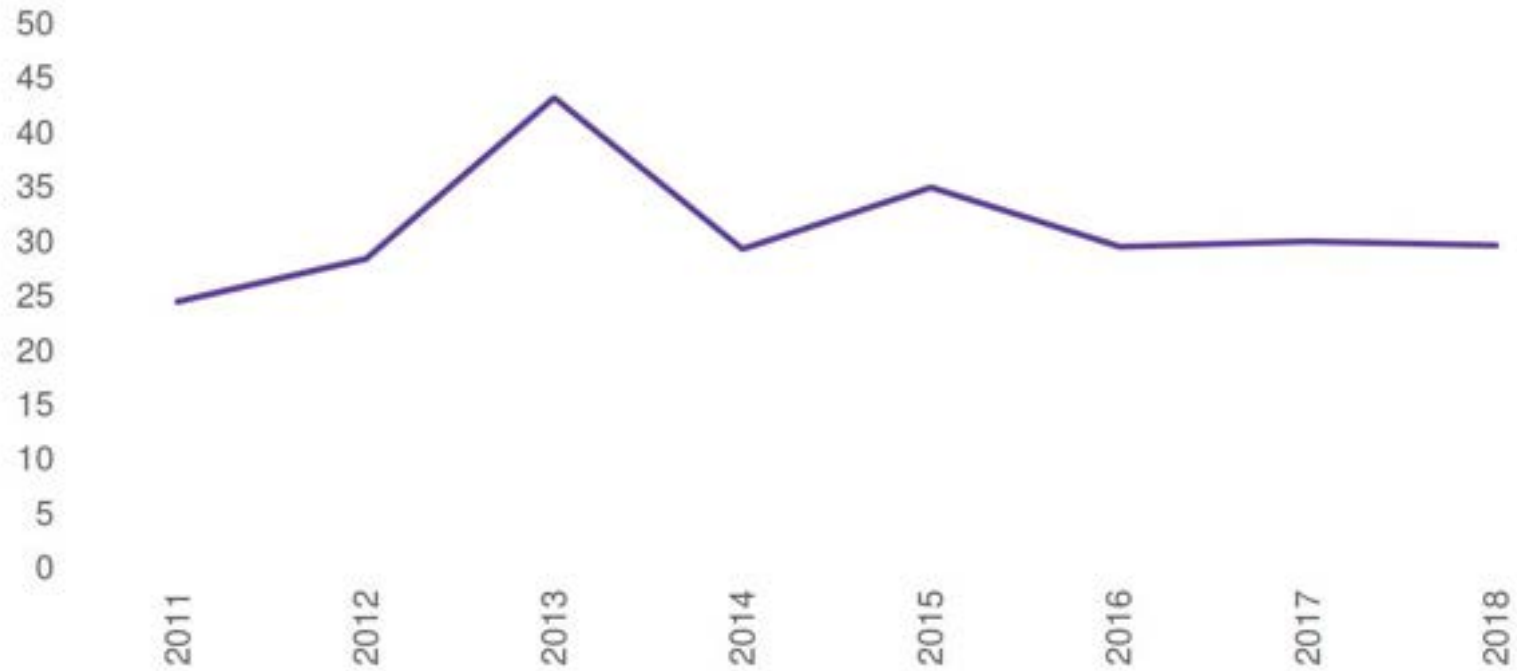
Pareto Fundraising, Legacy Foresight





## Australia GIW's per 1000 deaths

Average bequests per 1,000 deaths, 2011-2018



Pareto Fundraising Benchmarking

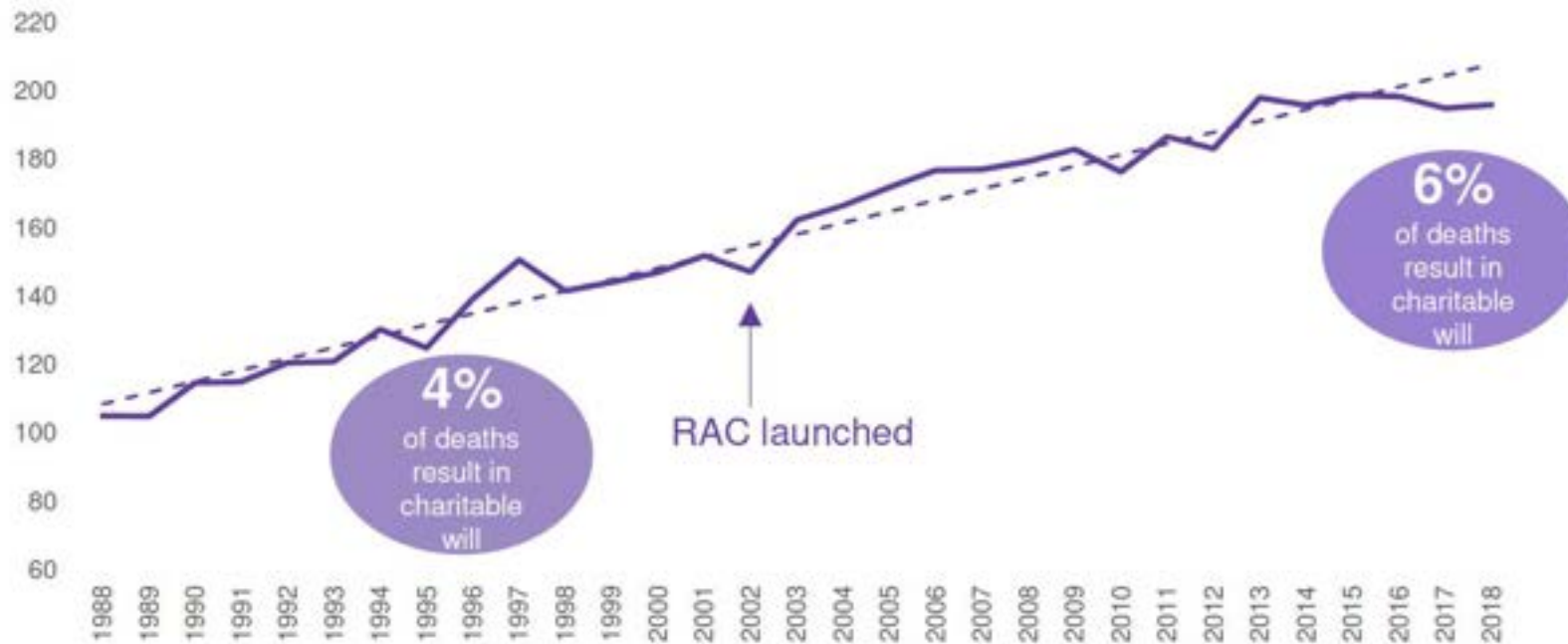
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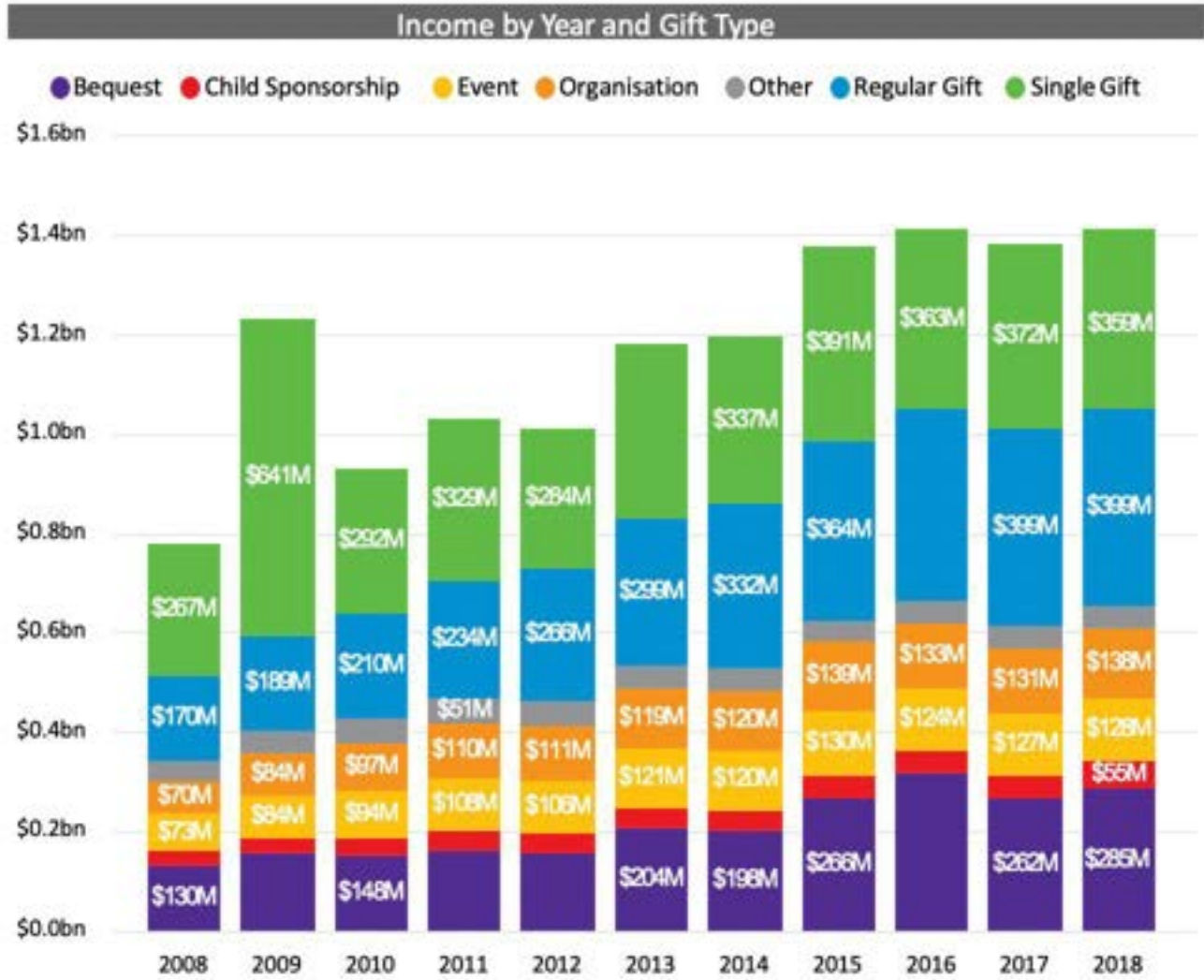


# A different approach can result in amazing growth!

## A very different pattern in the UK!

Bequests per 1,000 deaths, UK legacy market, 1988 - 2018





GIW's = 120% growth in last 10 years

2<sup>nd</sup> to 134% to RG.

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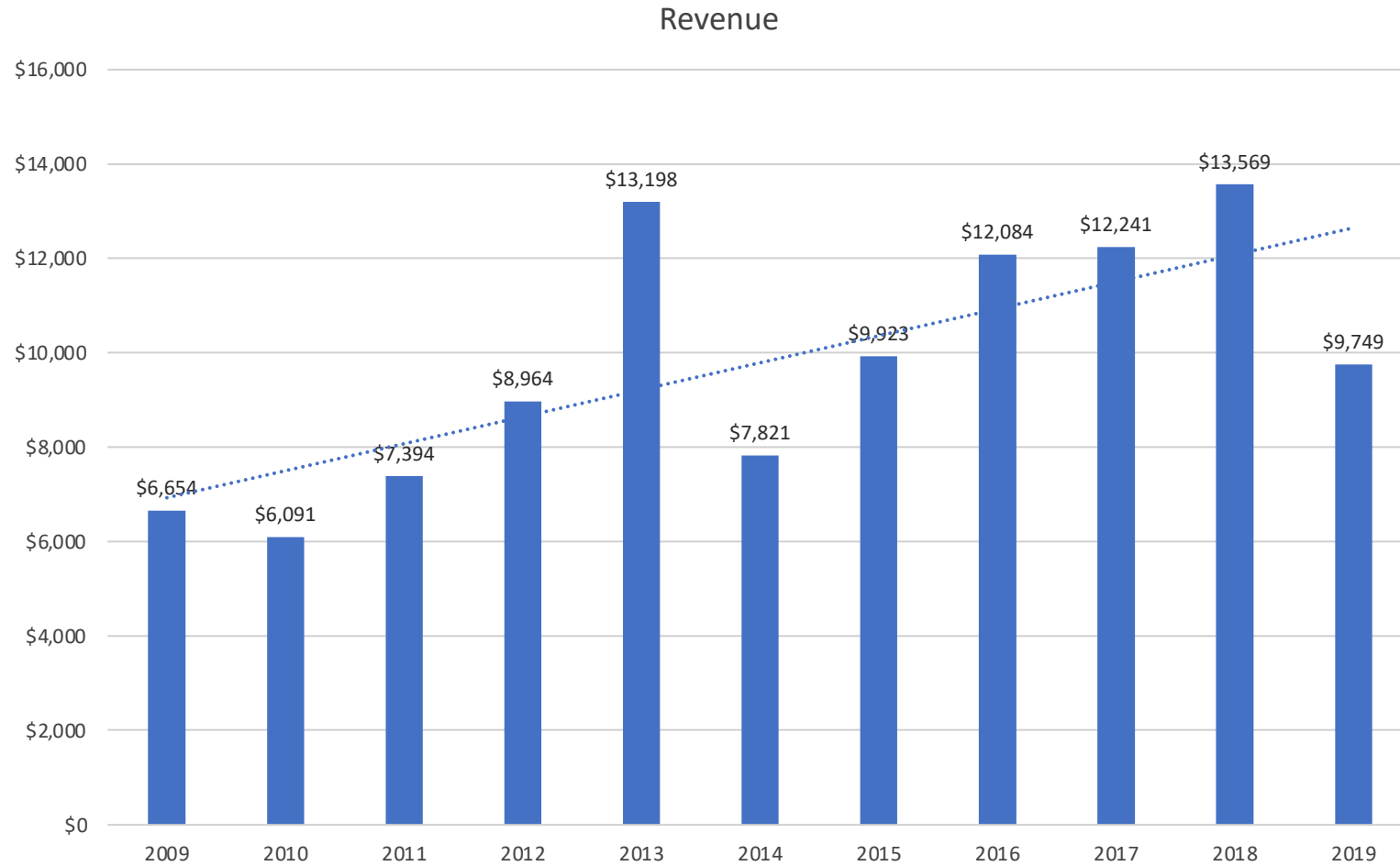
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## 2. Understand your organisation's performance

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## Some basic metrics

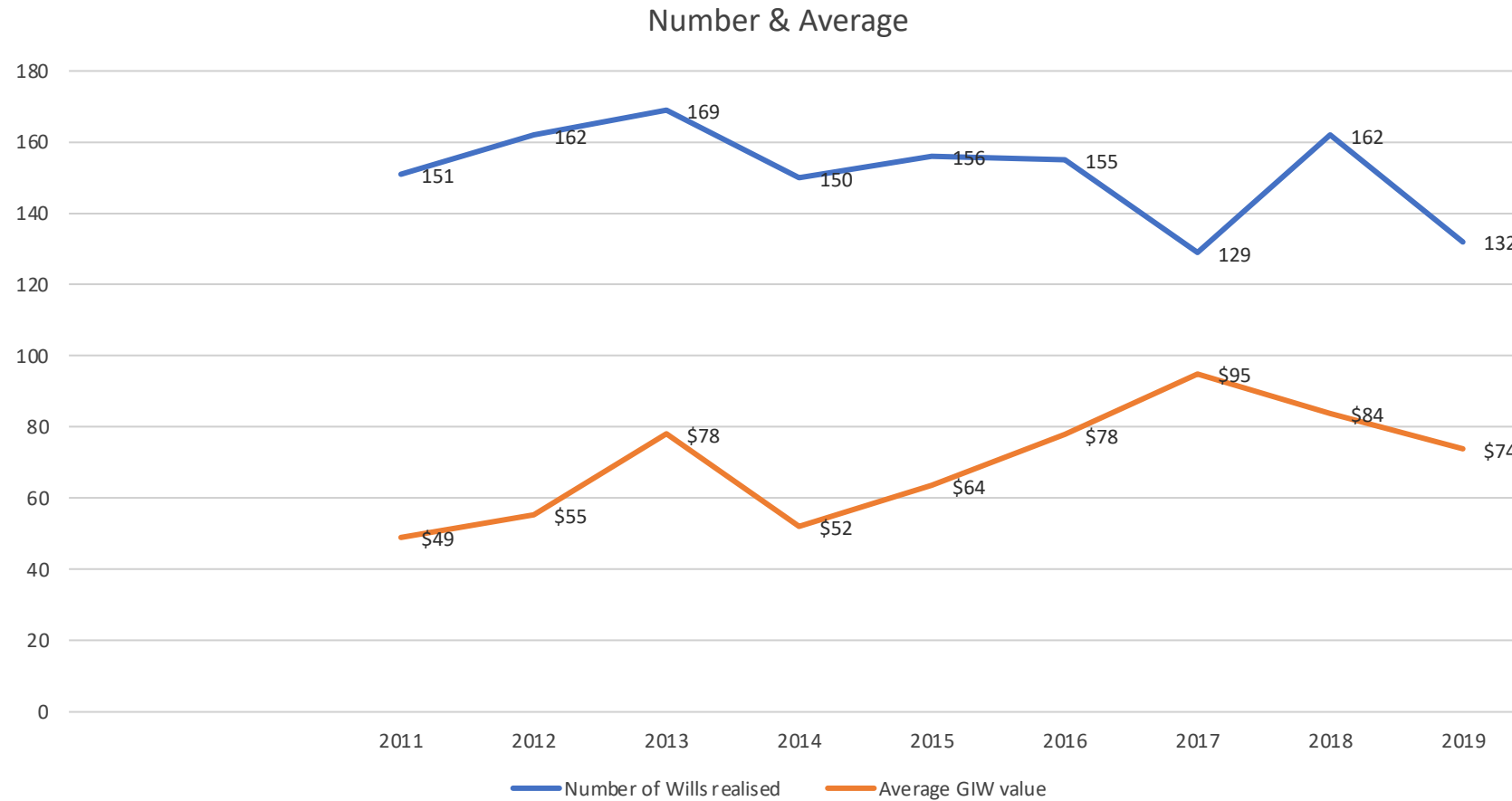


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# Real World GIW Volume & Value



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## Real World Assessments

### Key insight:

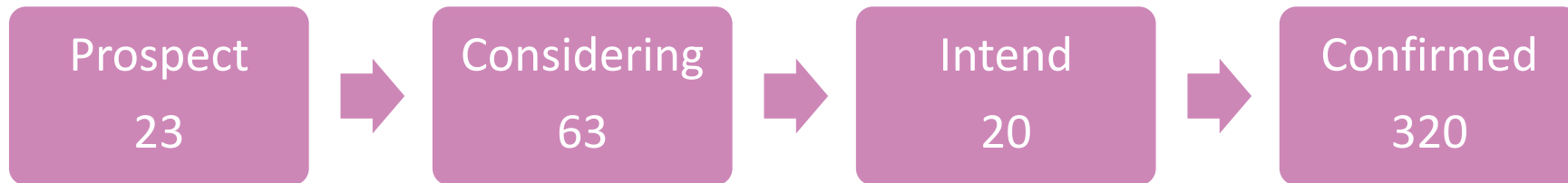
Likely revenue growth largely driven by property prices & asset increases.

Not by increase in number GIWs.

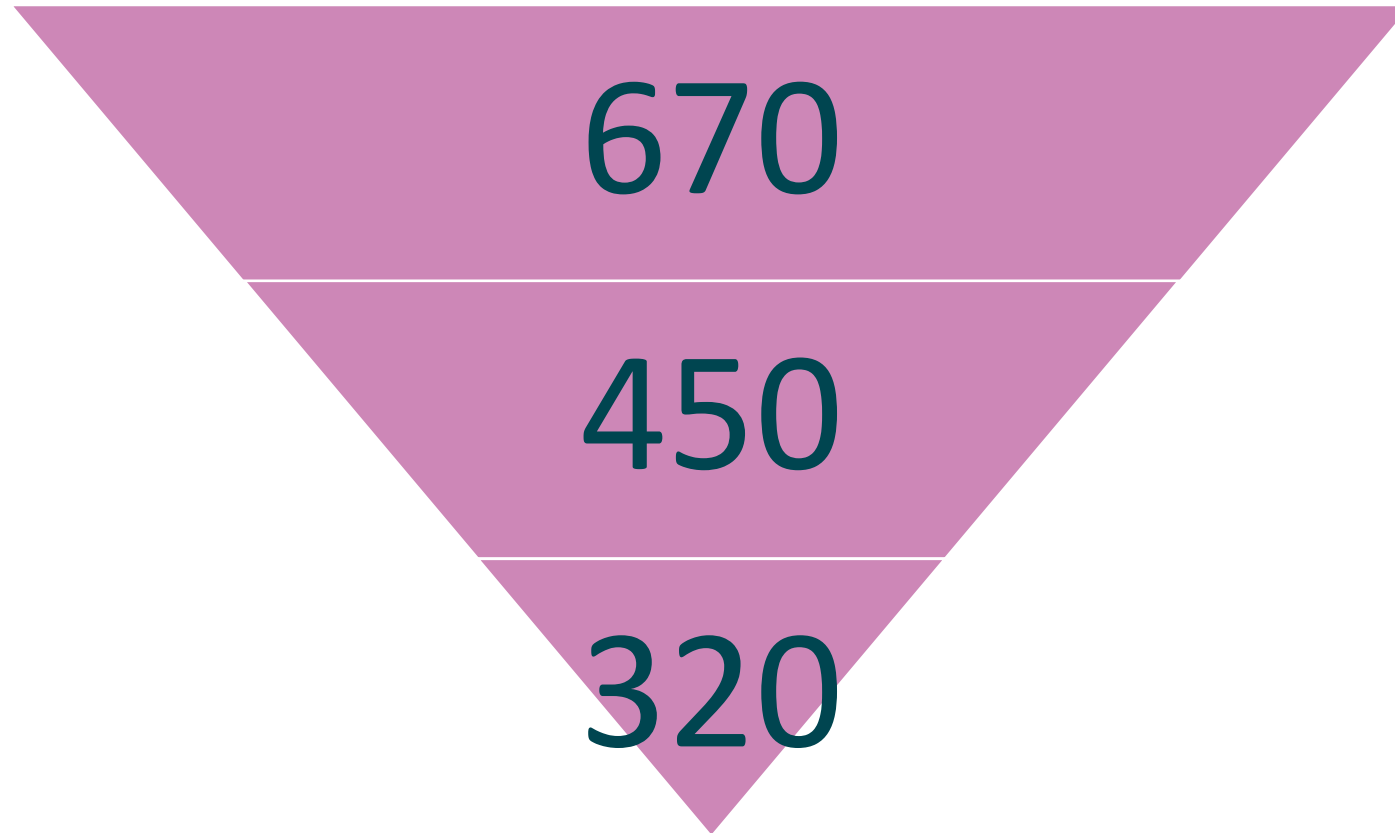
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## Health of your funnel



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Ideal funnel

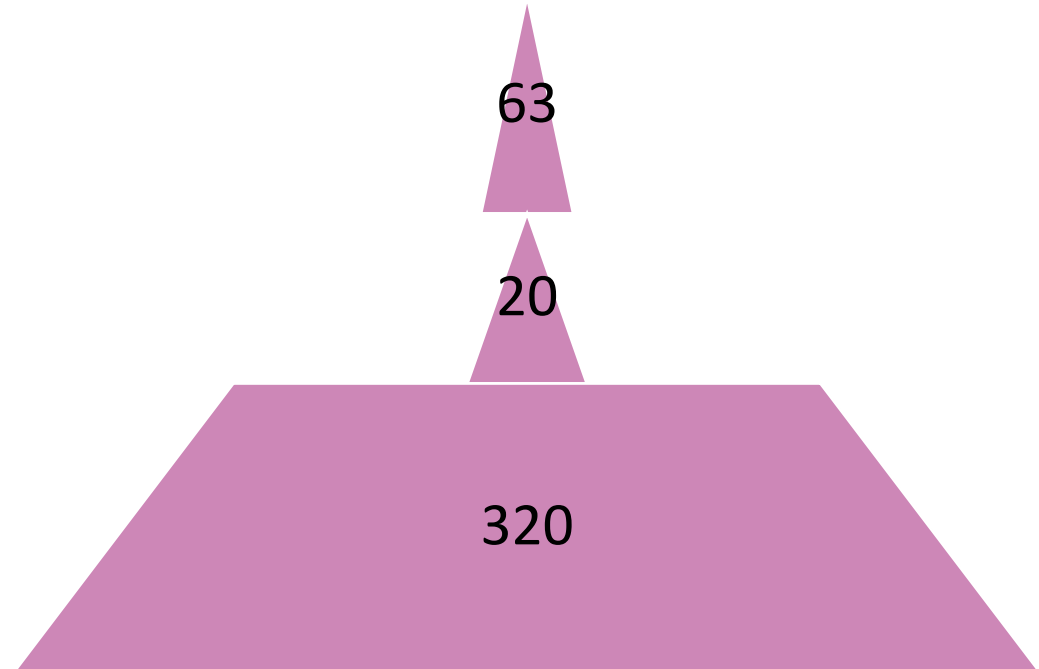
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## Health of your funnel

Key Insight:

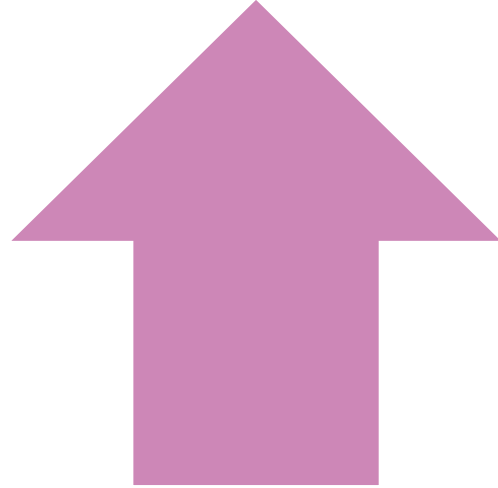
Clearly highlighting a lack of prospect development occurring.



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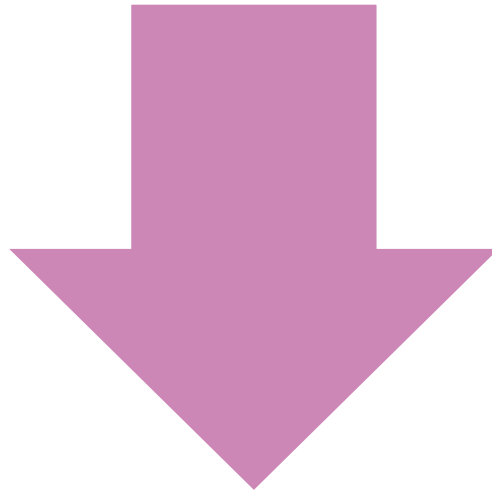


## How do you compare



Known

Sector Average  
33%



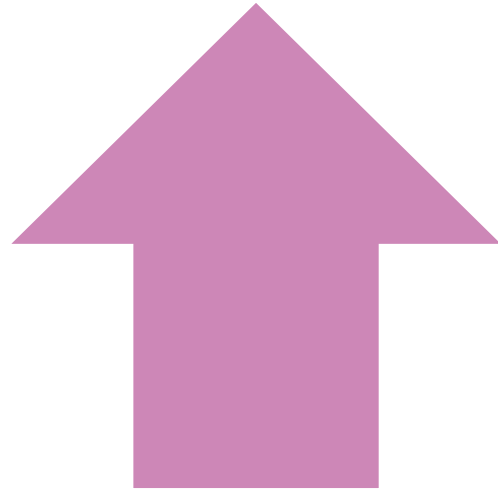
Unknown

67%

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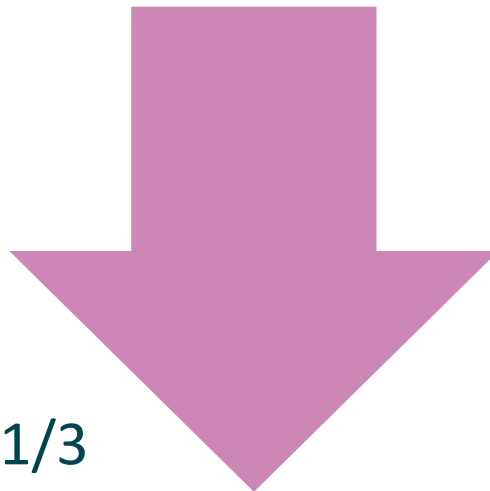


## Highly tuned GIW programs



GIW Flag 33%

Donor no GIW flag  
33%



Unknown  
33%

Good program: 1/3 / 1/3 & 1/3

Common: 10% / 20% / 70% - no proactive program

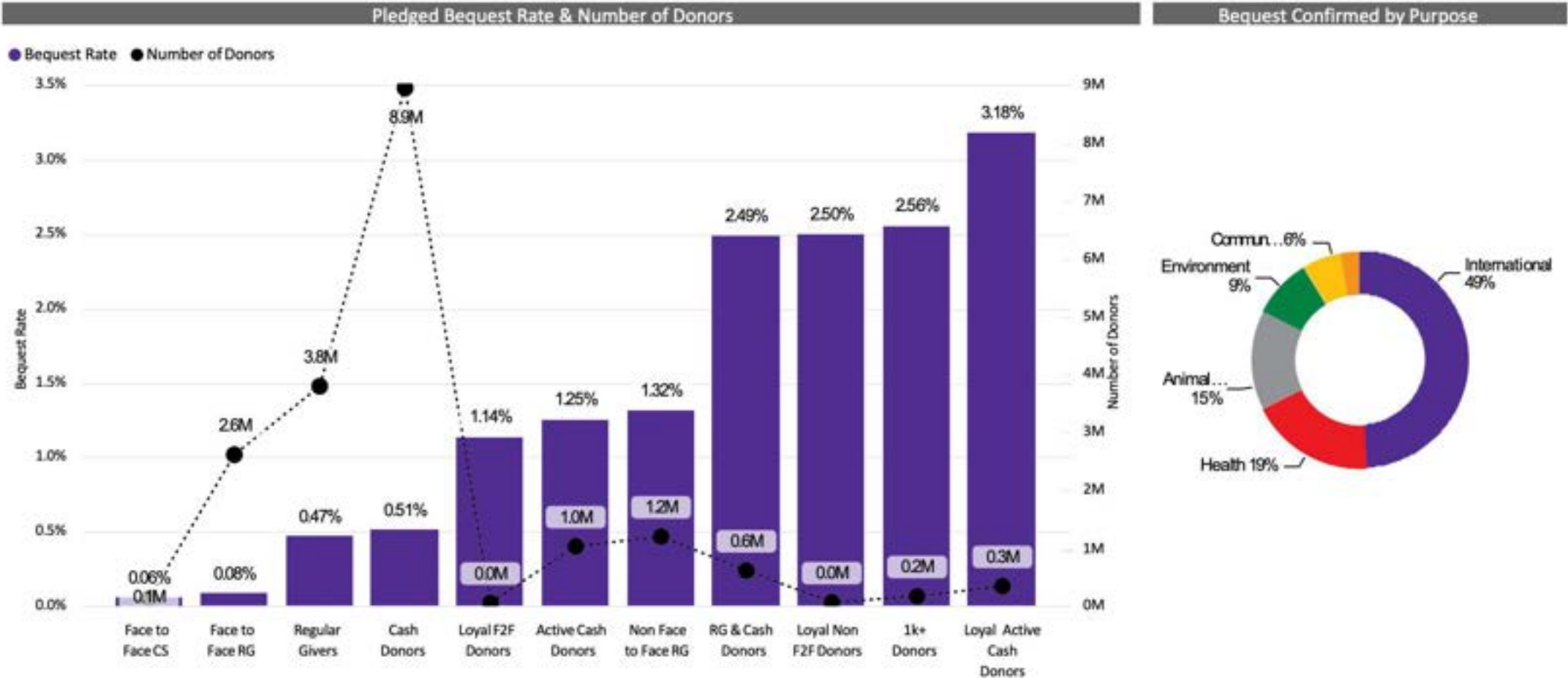
Common: 50% / 30% / 20% - too much time with existing

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# Sector benchmarking – how do you compare?

Source: Ive Benchmarking

## Pledged bequest rates by donor type and purpose.



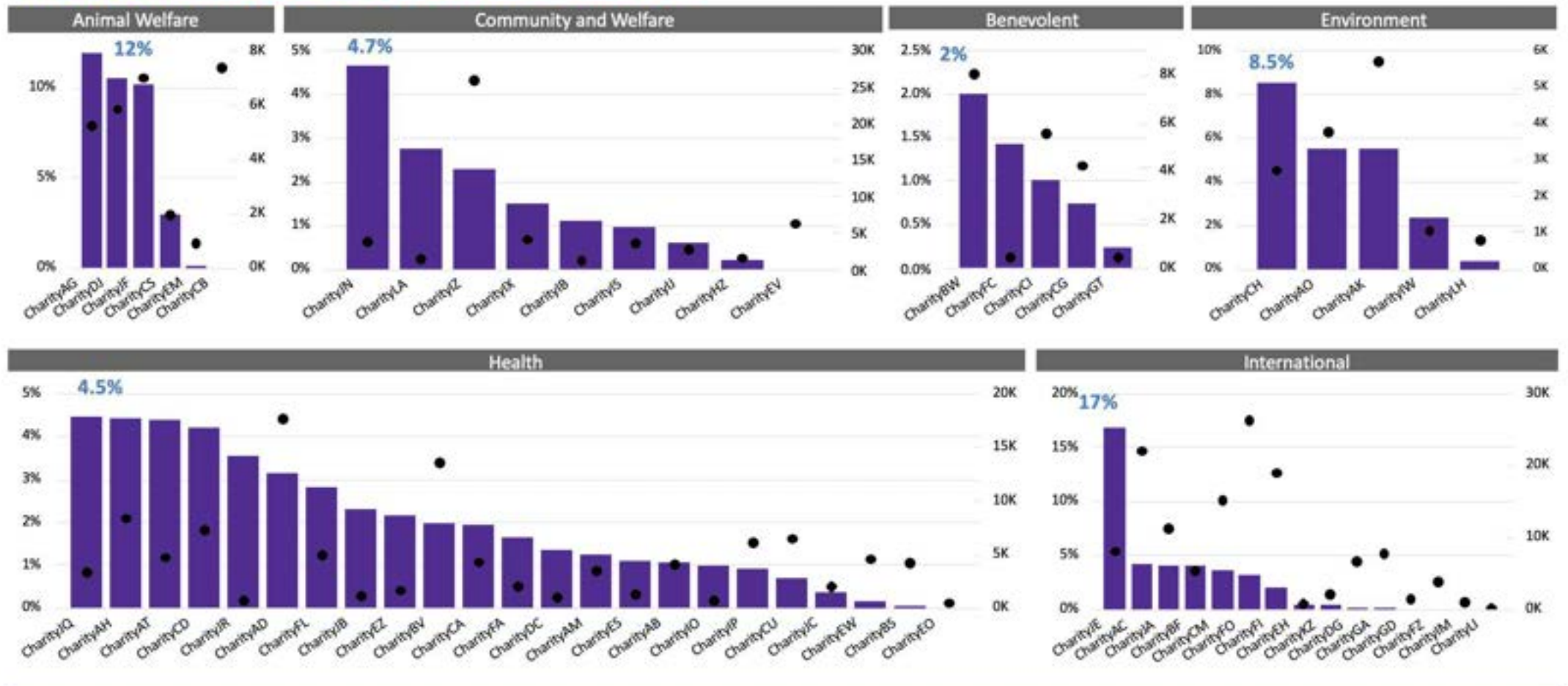




# Sector benchmarking – how do you compare?

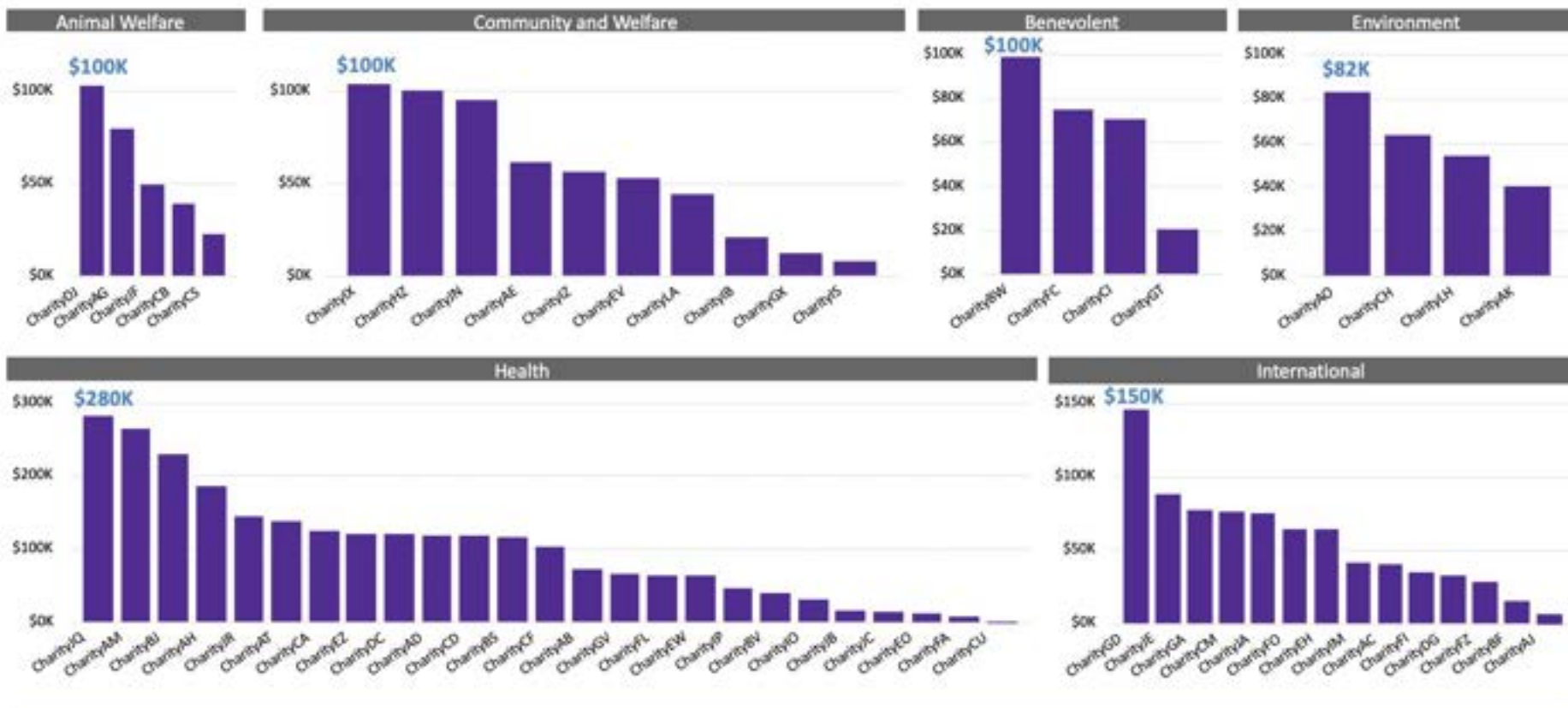
Source: Ive Benchmarking

## Loyal donor pledged bequest rates by charity.



# Sector benchmarking – how do you compare?

Average donor bequest amount by purpose.



Source: Ive Benchmarking

# Sector investment returns



## Return on Direct Costs (Totals based)

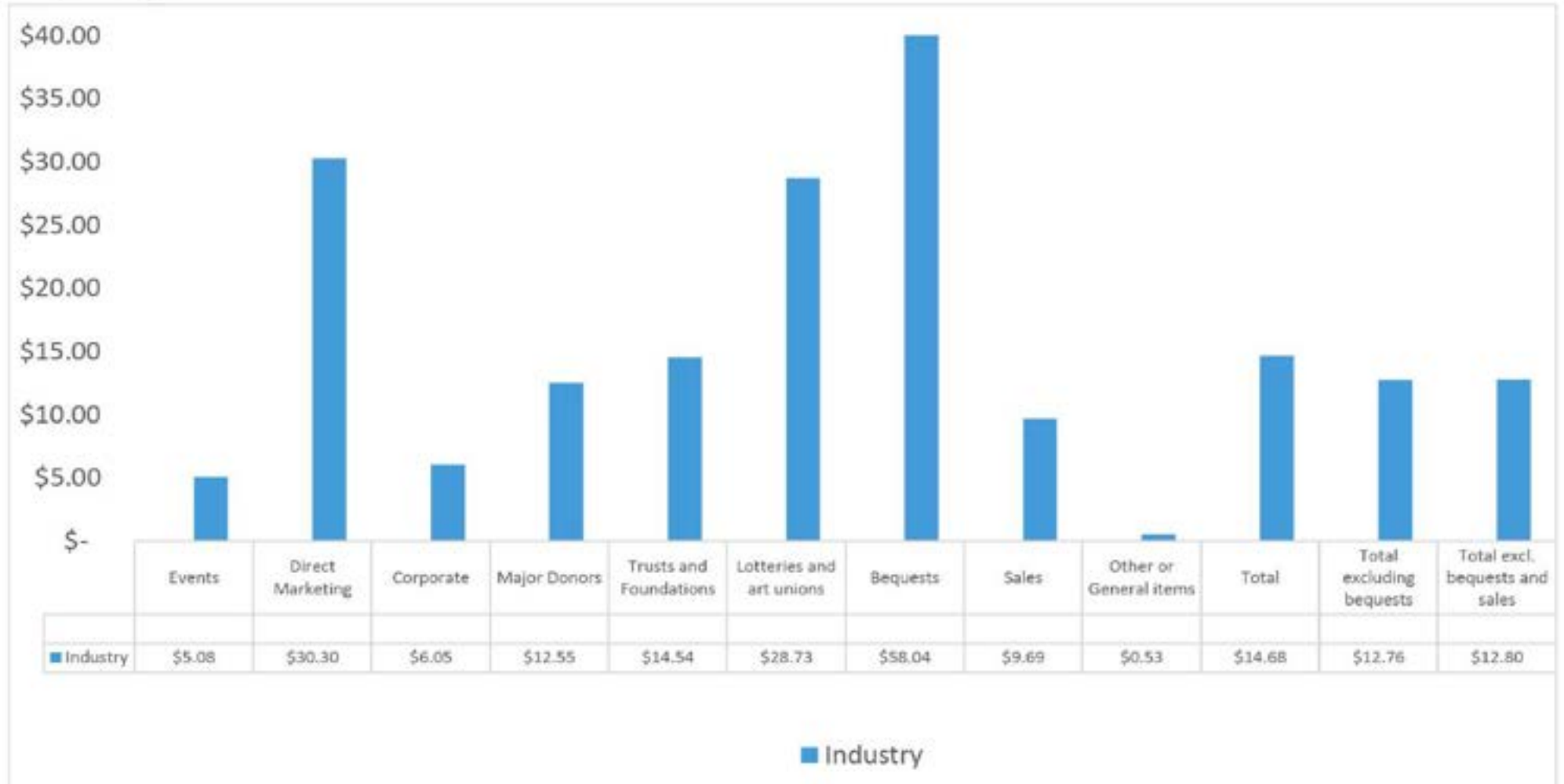


■ Industry

# Sector investment returns



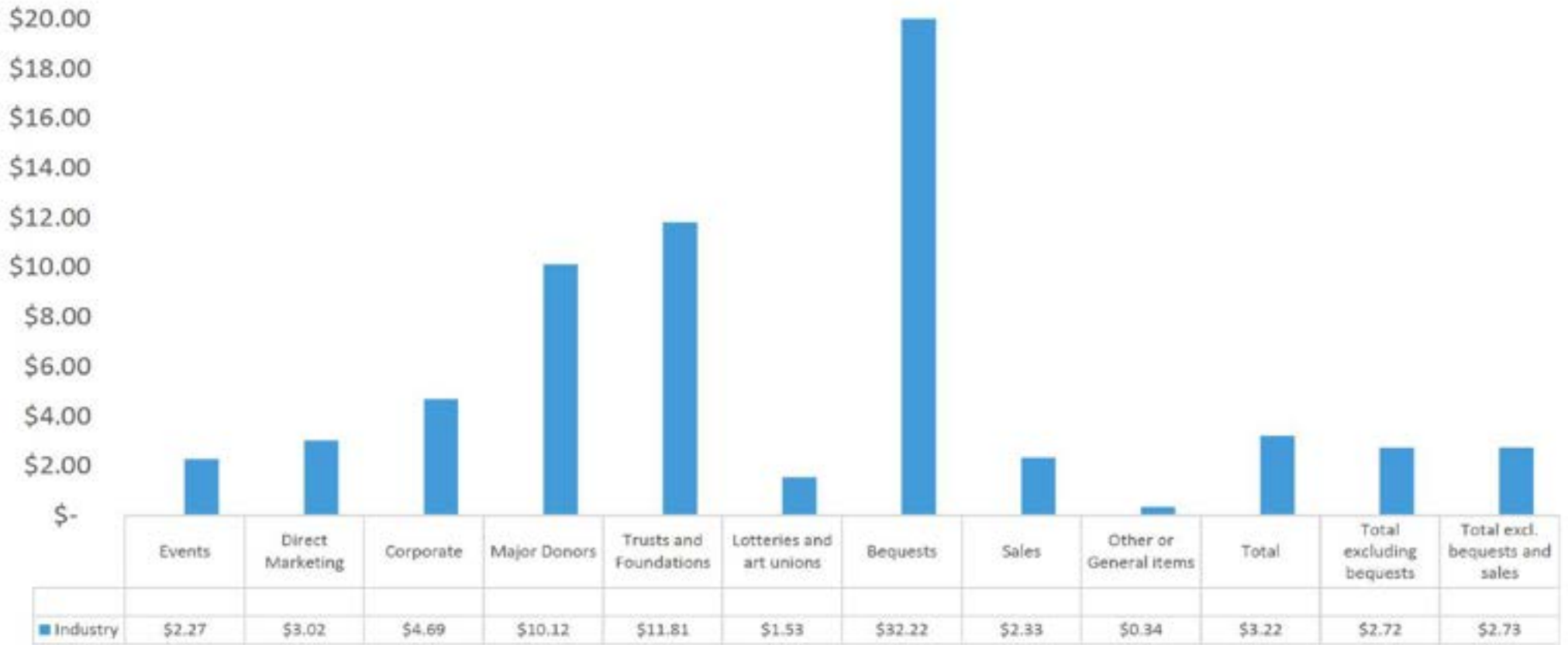
## Return on Labour (Totals based)



# Sector investment returns



## Return on all costs (Totals based)



■ Industry

# Deeper Analysis if budget allows

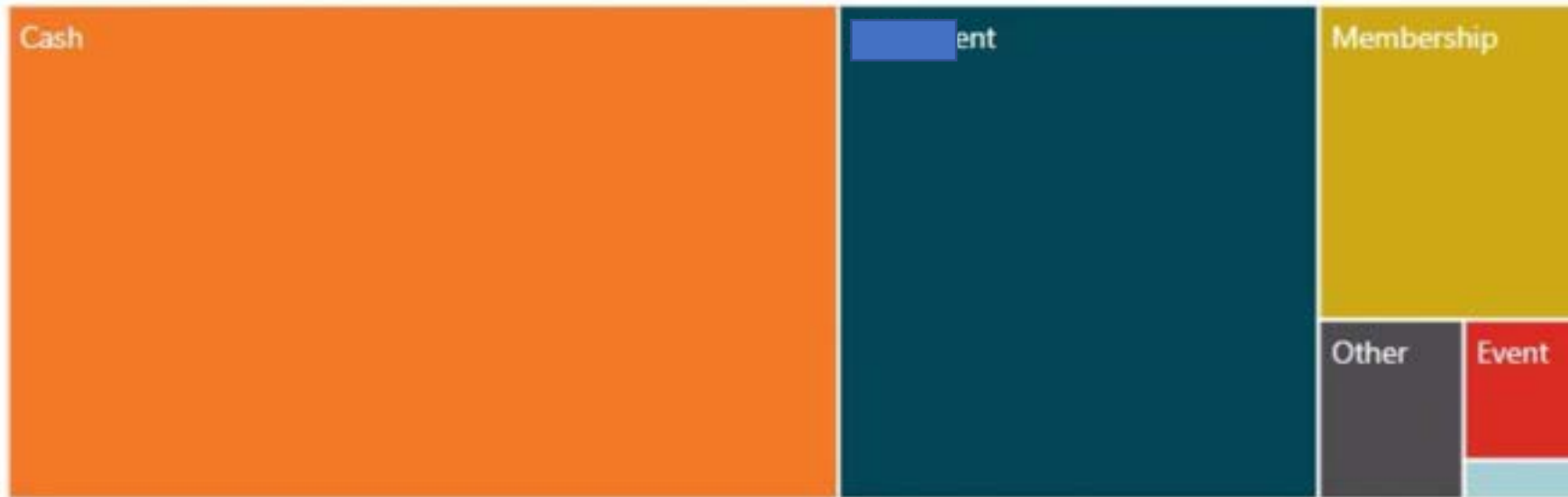
Value of Bequest by First Gift Type





# GIWs entry point by volume

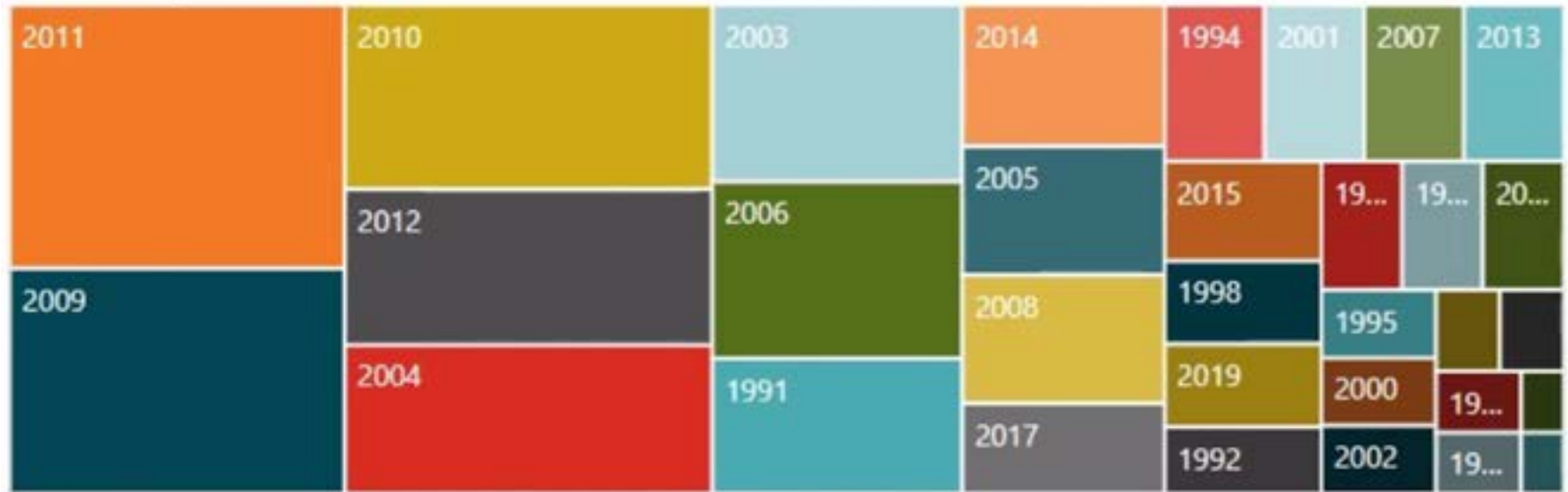
Confirmed by First Gift Type





# GIWs entry point by volume and year of first gift

Confirmed by Recruitment Year







## Realisation Rate

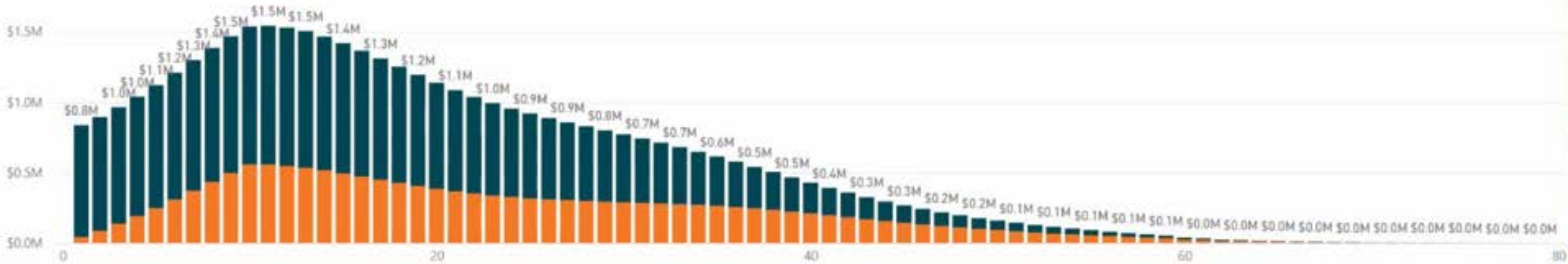


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# GIWs potential right now

Type ● BQProsp ● BQStatus



Type	0	5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	Total
BQStatus	\$3,279,315	\$4,625,249	\$4,867,313	\$4,293,059	\$3,439,251	\$2,770,847	\$2,153,509	\$1,481,250	\$889,479	\$498,122	\$276,717	\$143,767	\$50,227	\$17,885	\$6,513	\$2,147	<b>\$28,794,651</b>
BQProsp	\$454,073	\$1,856,291	\$2,707,421	\$2,244,968	\$1,764,943	\$1,520,112	\$1,402,189	\$1,220,385	\$912,575	\$604,388	\$376,718	\$217,701	\$84,501	\$32,859	\$13,283	\$4,621	<b>\$15,417,027</b>
<b>Total</b>	<b>\$3,733,388</b>	<b>\$6,481,540</b>	<b>\$7,574,734</b>	<b>\$6,538,027</b>	<b>\$5,204,194</b>	<b>\$4,290,958</b>	<b>\$3,555,698</b>	<b>\$2,701,635</b>	<b>\$1,802,053</b>	<b>\$1,102,510</b>	<b>\$653,435</b>	<b>\$361,469</b>	<b>\$134,728</b>	<b>\$50,744</b>	<b>\$19,797</b>	<b>\$6,768</b>	<b>\$44,211,678</b>

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3. Develop a plan to identify  
what you want to invest in

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## Process

1. Sector / Landscape analysis
2. Review of your program performance
3. Stakeholder meetings
4. Strategy workshop / education
5. Write it up into a plan / business case
6. Cost out the investment.



## Undertake internal stakeholder interviews

- CEO
- Board members
- Exec stakeholders
- Key fundraising team members
- Supporter services
- Legal / GIW estates management

Examine every area that GIWs mentions could occur



## Undertake internal stakeholder interviews

- The awareness and understanding of the GIW program and its impact
- Informing the potential for growth (the why)
- Understanding of the bigger 'brand' impact on GIW's
- Organisational need and desire for growth
- Receptivity to GIW's being at the heart of the organisation
- Appetite for and understanding of investment needs
- Discussion around the possible implications of this strategic decision
- Challenges and barriers and opportunities that may present themselves
- Ideas and ways to bring team members and volunteers along the journey
- How do they see the focus changing or evolving over time.

# Gifts in Wills Strategy Tree

## 7. Concerned Public / Non-Donors

TV • Radio • Digital • Outdoor • Search  
**Goal:** Give talkability and normalise concept to those where the organisations ongoing touchpoints don't reach as well as reinforce the messaging received

## 6. Always on GIW Awareness & Lead Generation

Supporter Surveys • Articles in Newsletters • Gifts in Wills targeted newsletters • Telemarketing • Events • Social media marketing • Include a Charity Week • Funding Statements • Tick boxes on reply devices • Mentions at any event • Bookmarks • Search • Single or Multi-wave GIW mailings • Thank you calls with GIW mentions • Articulated GIW visions  
**Goal:** Seed the idea of leaving a gift in a supporters Will and provide ways for them to express interest

## 4. Donor Love

Newsletters • Impact Reports • Feel good thank you's • Best practice asking  
**Goal:** Deepen engagement to increase number and value of gifts

## 9. GIW Confirmed & Reconfirmed Stewardship

Welcome pack • Welcome to GIW Society • Exclusive events • Past donation thank you calls • Focus on data collection where gaps exist • Updates to keep 'on the inside track' • Digital background marketing demonstrating impact to reinforce decision • Strong personalised stewardship  
**Goal:** Highly engaged supporter who prioritises your charity in their Will and considers increasing the value over time

## 8. GIW Consideration, Cultivation & Inspiration

Activities as per focus area 6 as well as:  
 GIW Relationship Management • Focus on data collection • Personalisation where possible • Strong conversion pack • Conversion pathway mapped • Informative • Friendly GIW area of website • Thank you calls • Invite to events • Annual reports • Mini Surveys • Digital background marketing to amplify conversion asks / inpost • online Wills  
**Goal:** To migrate supporter to place your charity in their Will

## 5. Mid Value Donors

Focus on data collection to allow for better personalisation • Invite to events • More rational asks and content • Thank you post donation calls • Part of special group • Xmas and Birthday Cards  
**Goal:** Deepen engagement to increase number and value of gifts

## 3. Onboarding & Welcome Journey

**Goal:** Engage donors and encourage subsequent giving

## 2. Supporter Entry Points



## 1. Strong Foundations for Growth





# Map promotion out and secure agreement

GIW Year Round Touchpoints 2020 to end 2021									
July 20	August 20	September 20	October 20	November 20	December 20	January 21	February 21	March 21	April 21
[Redacted]									
May 21	June 21	July 21	August 21	September 21	October 21	November 20	December 20	January 21	February 21
Talking Books						Year Appeal Wave	Year Appeal Wave	Anniversary	All 50 + GIW
[Redacted]									
To all who received the mailing.									

**Ongoing: Relationship Management** Cycle as appropriate per supporter, using primarily phone / mail / events + **Funding Statements** on communications across entire organisation from 2022 + Did you know **bookmarks** to be included where appropriate across organisation from 2021.

**Triggered Touchpoints:** Birthday Card + Update on **Area of Interest** if news released

In 2022: July - Migrates back to updated GIW Survey with digital custom audiences integrated and ATL campaign continues. In 2023: July - Migrates back to GIW Mailing, however this is a 3 wave campaign, culminating in the 3rd wave being in July. Suggested Wave 1 end January 2023, Wave 2: June 2023 and wave 3 July 2023.

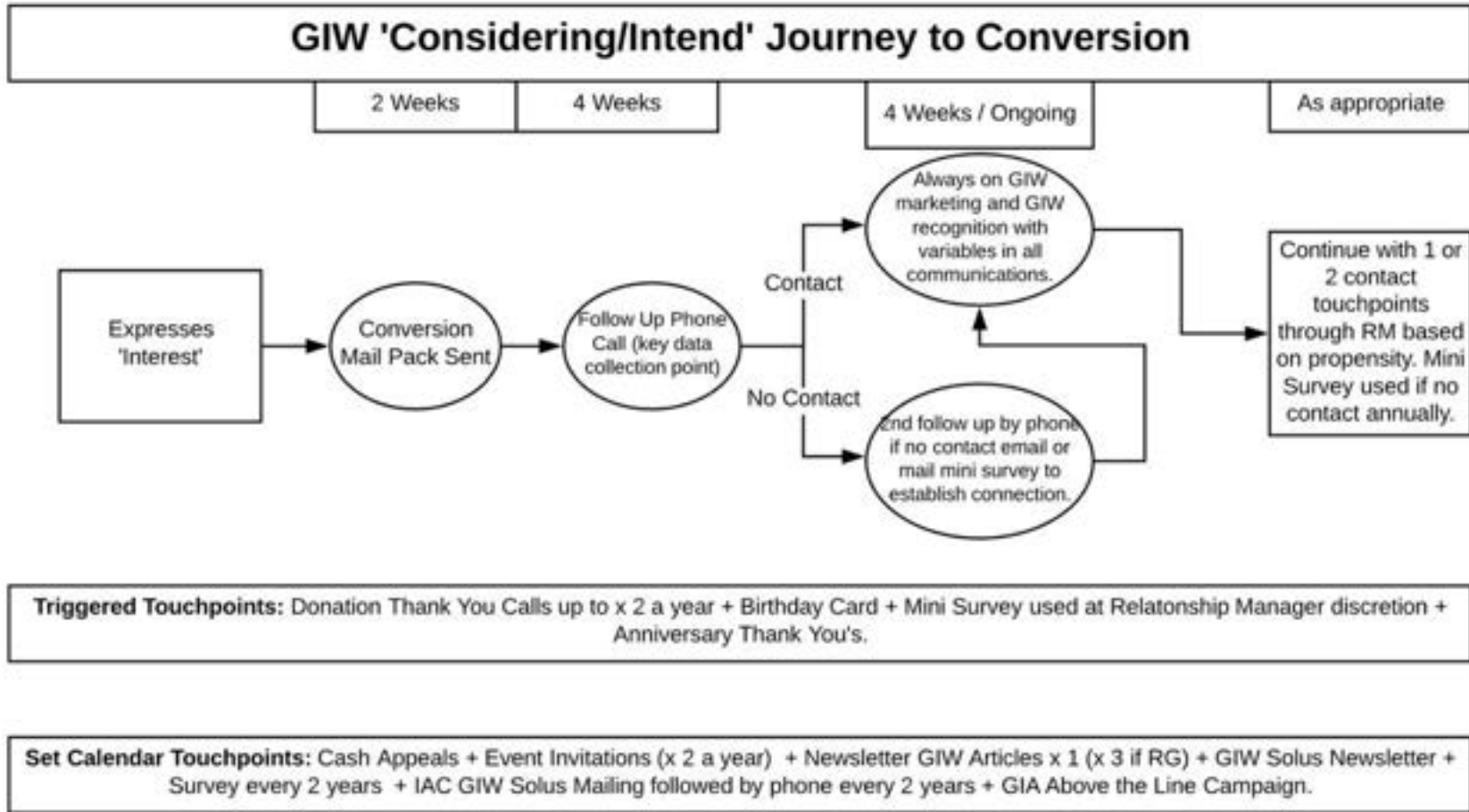


# Phase investment requirements

GIW promotional activity summary by year of introduction



# Map every journey to capture all needs





# Cost it

Financial Year	What	Amount	Notes
2020			
TOTAL 2020			
2021			
Total 2021			
2022			
	TV Radio Ad Media Spend	300,000	

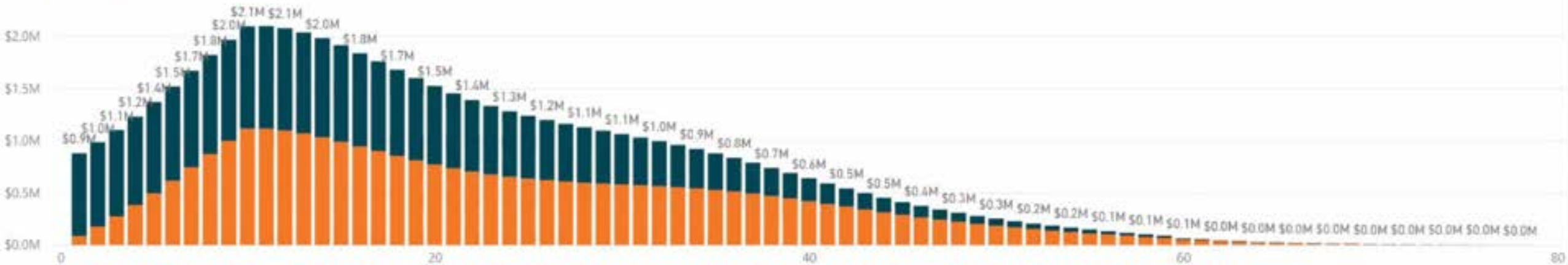
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# GIWs potential with a proactive program

Bequest income - years from today - split Prospects and Current Status

Type ● BQProsp ● BQStatus



Type	0	5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	Total
BQStatus	\$3,279,315	\$4,625,249	\$4,867,313	\$4,293,059	\$3,439,251	\$2,770,847	\$2,153,509	\$1,481,250	\$889,479	\$498,122	\$276,717	\$143,767	\$50,227	\$17,885	\$6,513	\$2,147	<b>\$28,794,651</b>
BQProsp	\$908,146	\$3,712,582	\$5,414,845	\$4,489,935	\$3,529,889	\$3,040,223	\$2,804,382	\$2,440,767	\$1,825,151	\$1,208,772	\$753,437	\$435,405	\$169,004	\$65,722	\$26,567	\$9,244	<b>\$30,834,051</b>
<b>Total</b>	<b>\$4,187,461</b>	<b>\$8,337,831</b>	<b>\$10,282,158</b>	<b>\$8,782,994</b>	<b>\$6,969,140</b>	<b>\$5,811,069</b>	<b>\$4,957,891</b>	<b>\$3,922,017</b>	<b>\$2,714,629</b>	<b>\$1,706,894</b>	<b>\$1,030,154</b>	<b>\$579,173</b>	<b>\$219,231</b>	<b>\$83,607</b>	<b>\$33,081</b>	<b>\$11,391</b>	<b>\$59,628,702</b>

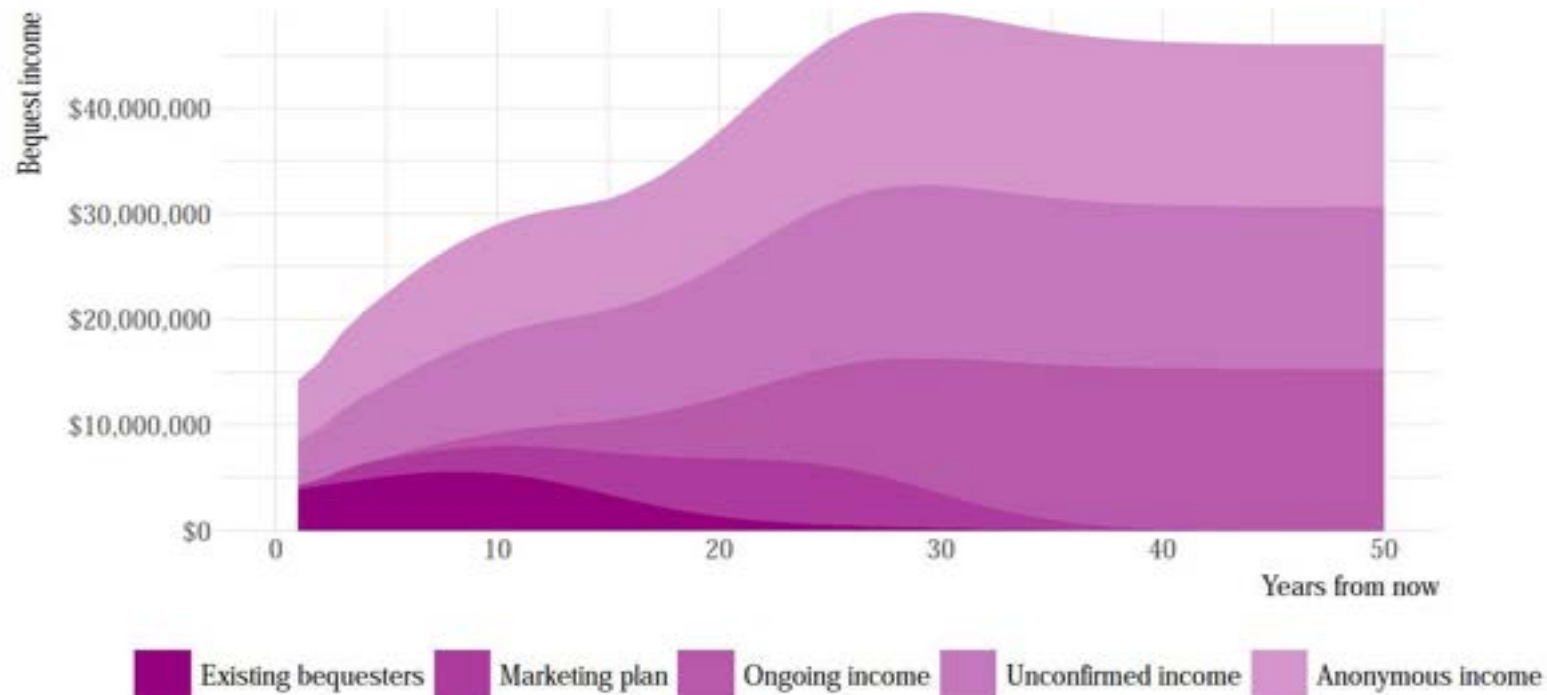
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# Modelling

## Total bequest income forecast

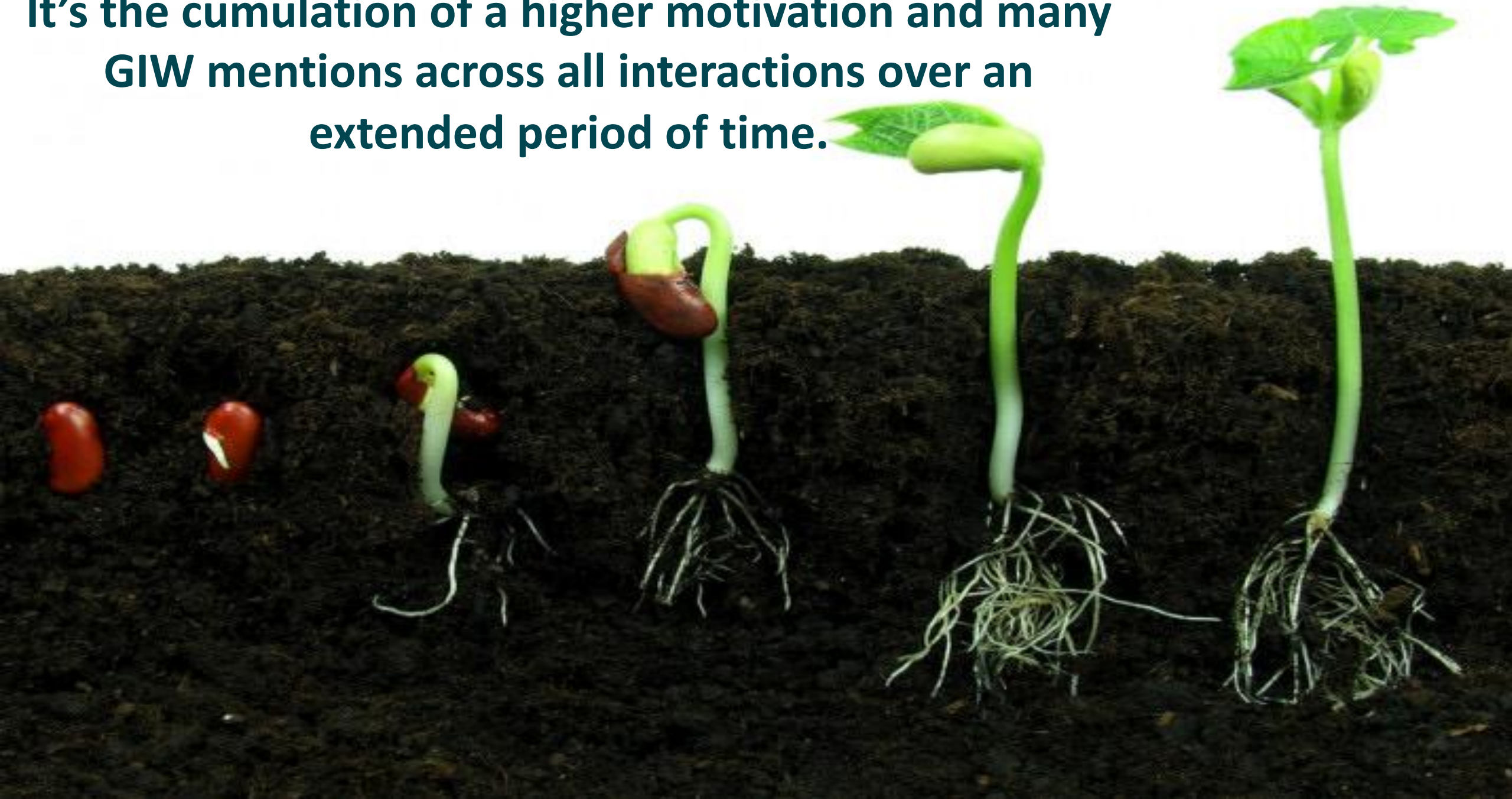
Expected income from ongoing bequest marketing, including expected unknown income



Model: Proposed Marketing Plan (inc ATL)

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**It's the cumulation of a higher motivation and many GIW mentions across all interactions over an extended period of time.**





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## 4. Educate internal key stakeholders

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# Importance of patience







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# 5. Outline how you'll measure success

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## Dashboard KPI ideas

- Whole of organisation GIW mentions
- Pipeline numbers across the X stages of conversion and annual movement between each
- % of movement from Interested to Considerer
- % of movement from Considerer to Intender
- % of movement from Intender to Confirmed
- Time to confirmed from entry into the funnel
- Pipeline by GIW score volumes (to demonstrate engagement across whole of fundraising)
- Funnel by some score volumes to track over time
- Number of GIW conversations (by team and type)
- Realisation rate
- Original source of confirmed GIW's vs. other funnel stages to truly understand the most important pipeline areas
- Number and revenue of realised GIW's that were known vs. unknown
- Individual activity measurements
- Contact reports



# Understanding the health of your pipeline

GIW Scoring	Score
5+ Gifts	1
10+ Gifts	2
Gift 5+ Years ago	1
Gift 10+ years ago	2
Gift 15+ years ago	3
Gift in the last 12 months	1
Non F2F RG	1
RG gift greater than 3 years + 50	1
Made single gift of \$250 - \$999	2
Made a single gift of \$1000 +	2
Age 50 +	1
No children	4
Single/Widowed	2
Informed [redacted] address change	2
Has family member supported by [redacted]	3
Has/is supported by [redacted]	3
Current or past volunteer	2
Family Imprint	1
Sense of financial security	5
<b>Total possible score</b>	<b>39</b>

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## 7. Process Summary

1. Sector / Landscape analysis
2. Review of your program performance
3. Stakeholder meetings
4. Strategy workshop / education
5. Write it up into a plan / business case
6. Cost out the investment
7. Agree measurables/KPIs to track performance
8. Internal support
9. Present the plan to the Board for agreement
10. Secure agreement and understanding of implications of investment changes.



Thank you

Marcus Blease, Director, Donor Republic

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The logo for Donor Republic, featuring a white letter 'R' inside a dark teal square.

R

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