



INCLUDE A CHARITY

Make your mark

2021 Supporter Survey

Include a Charity 2021 Supporter Survey



Summary

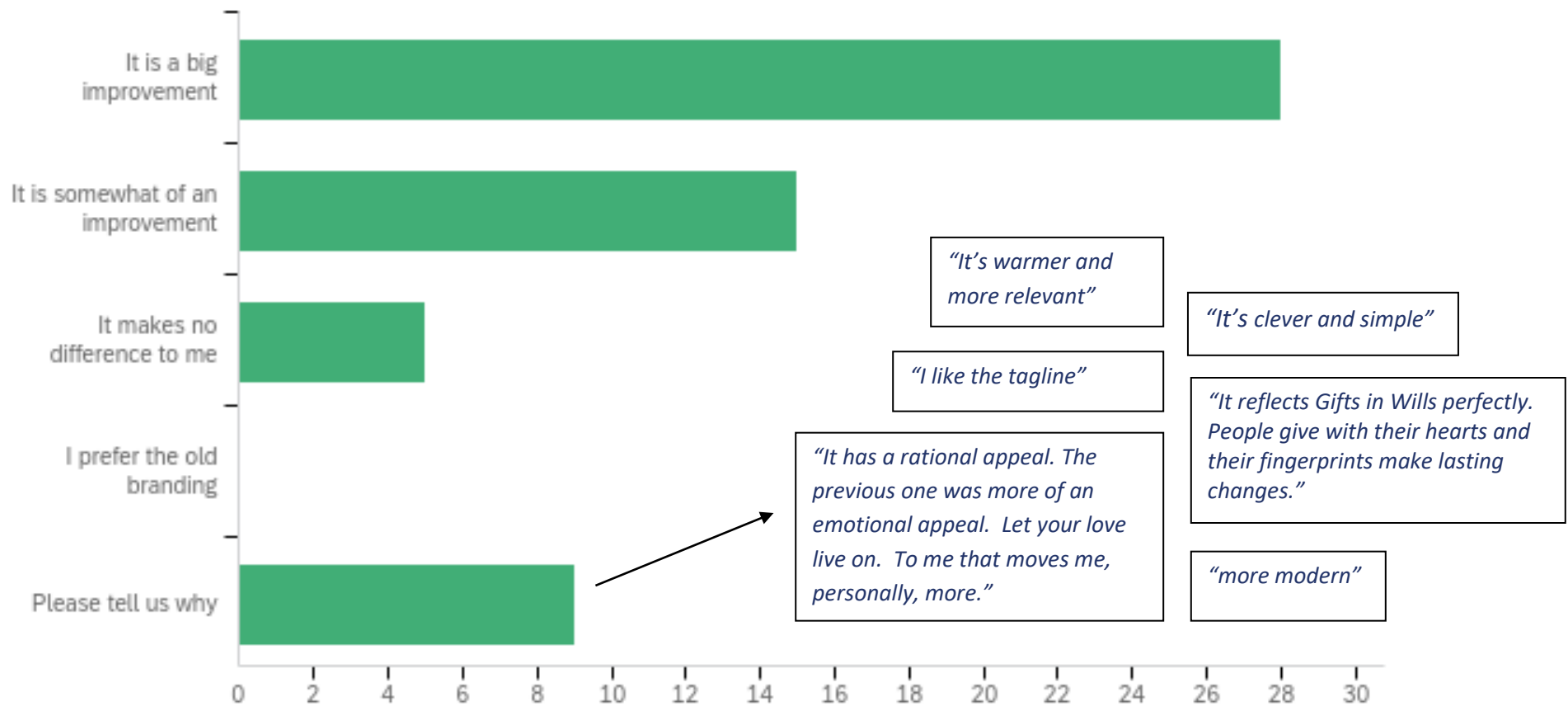
The IAC Supporter Survey is important in helping us to understand how we can continue to meet the needs of members and the broader gifts in Wills sector.

- Survey sent out Wednesday 17 November 2021.
- Sent to our mailing list of 226 recipients from our 107 supporter organisations.
- Responses received: 60.

Include a Charity 2021 Supporter Survey



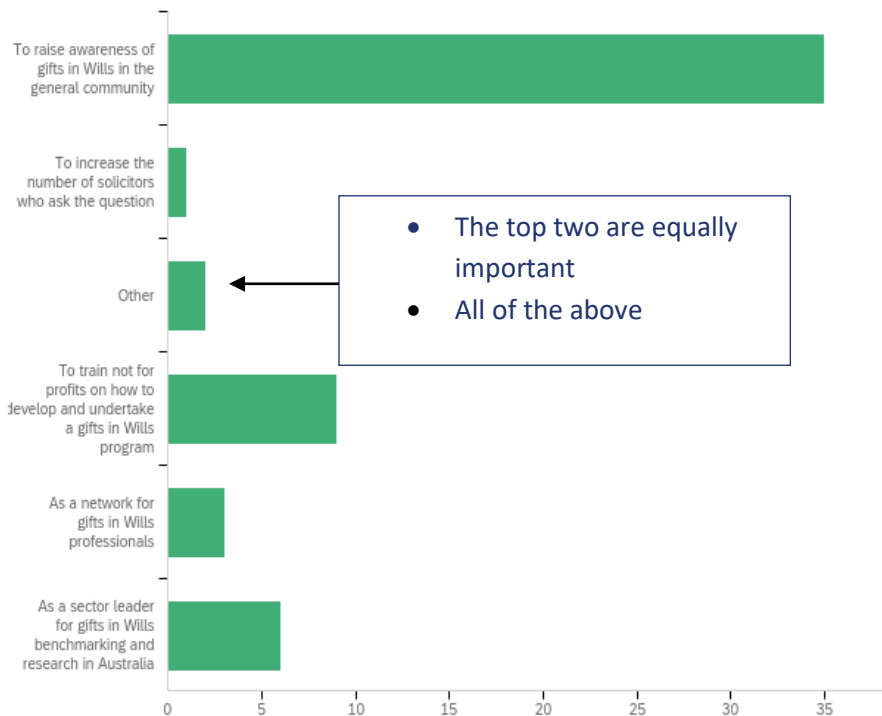
Q1 - What you think about our new branding is important to us. Please choose one of the below to indicate how you feel about it.



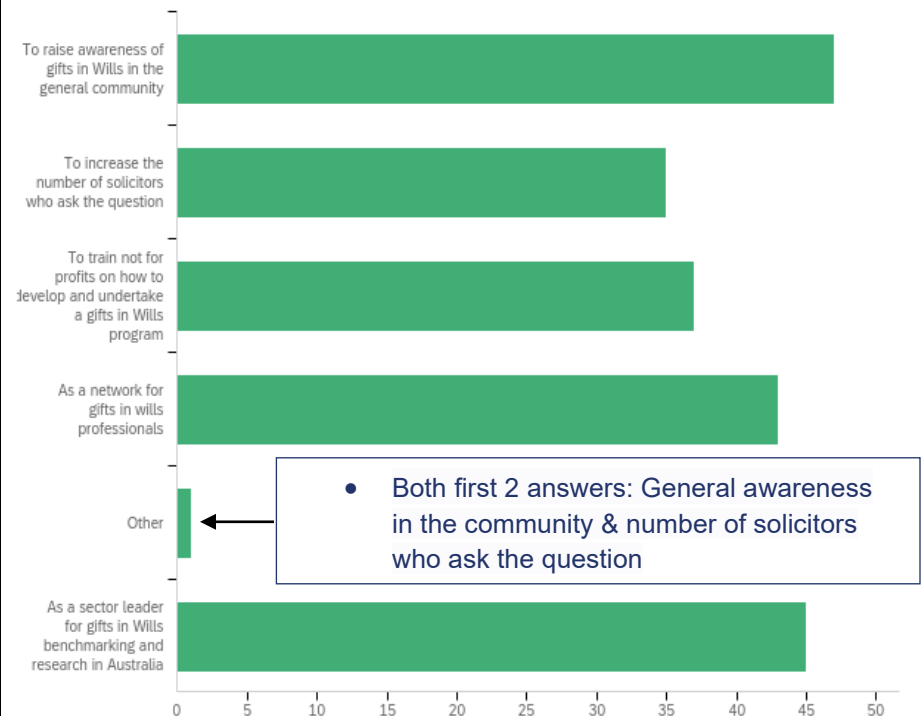
Include a Charity 2021 Supporter Survey



Q2 - What do you feel is the most important role of Include a Charity?



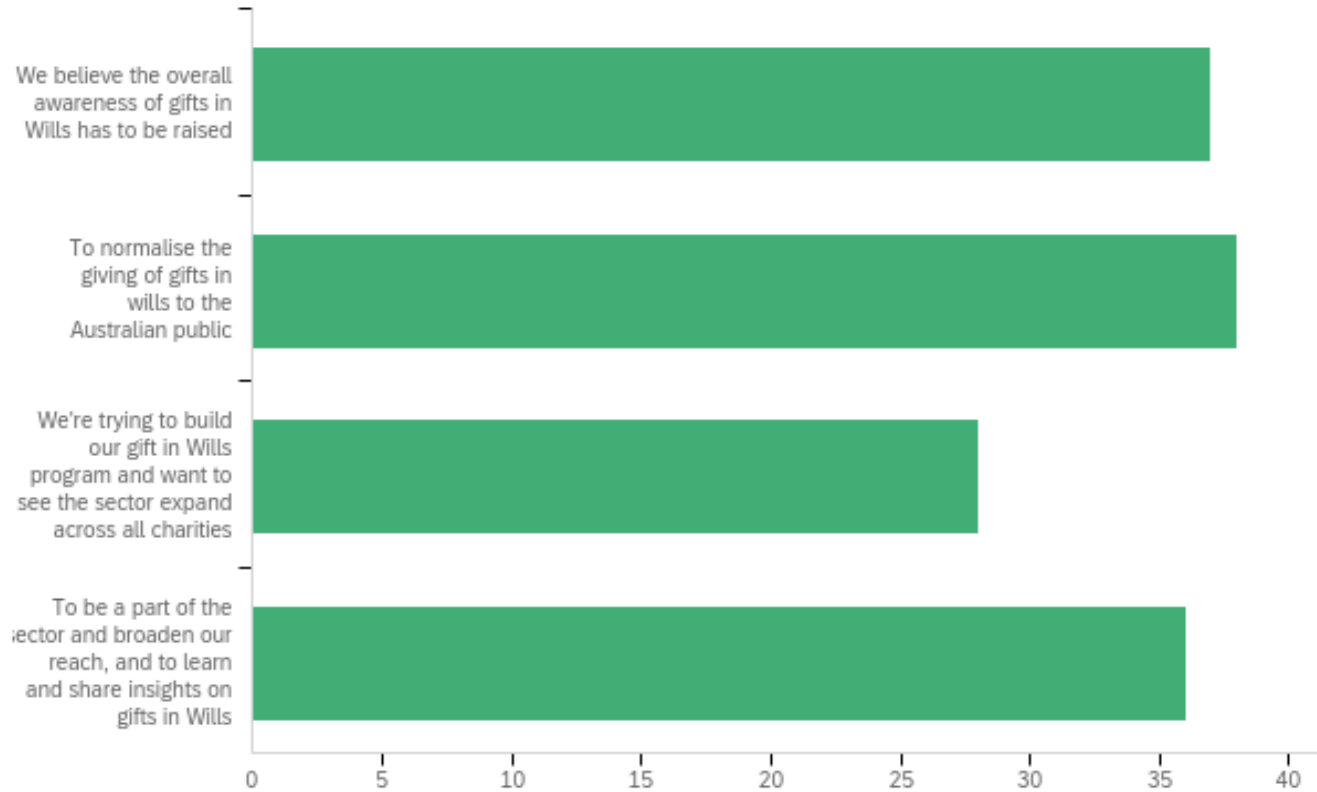
Q3 - What roles should Include a Charity be responsible for? Select all that apply.



Include a Charity 2021 Supporter Survey



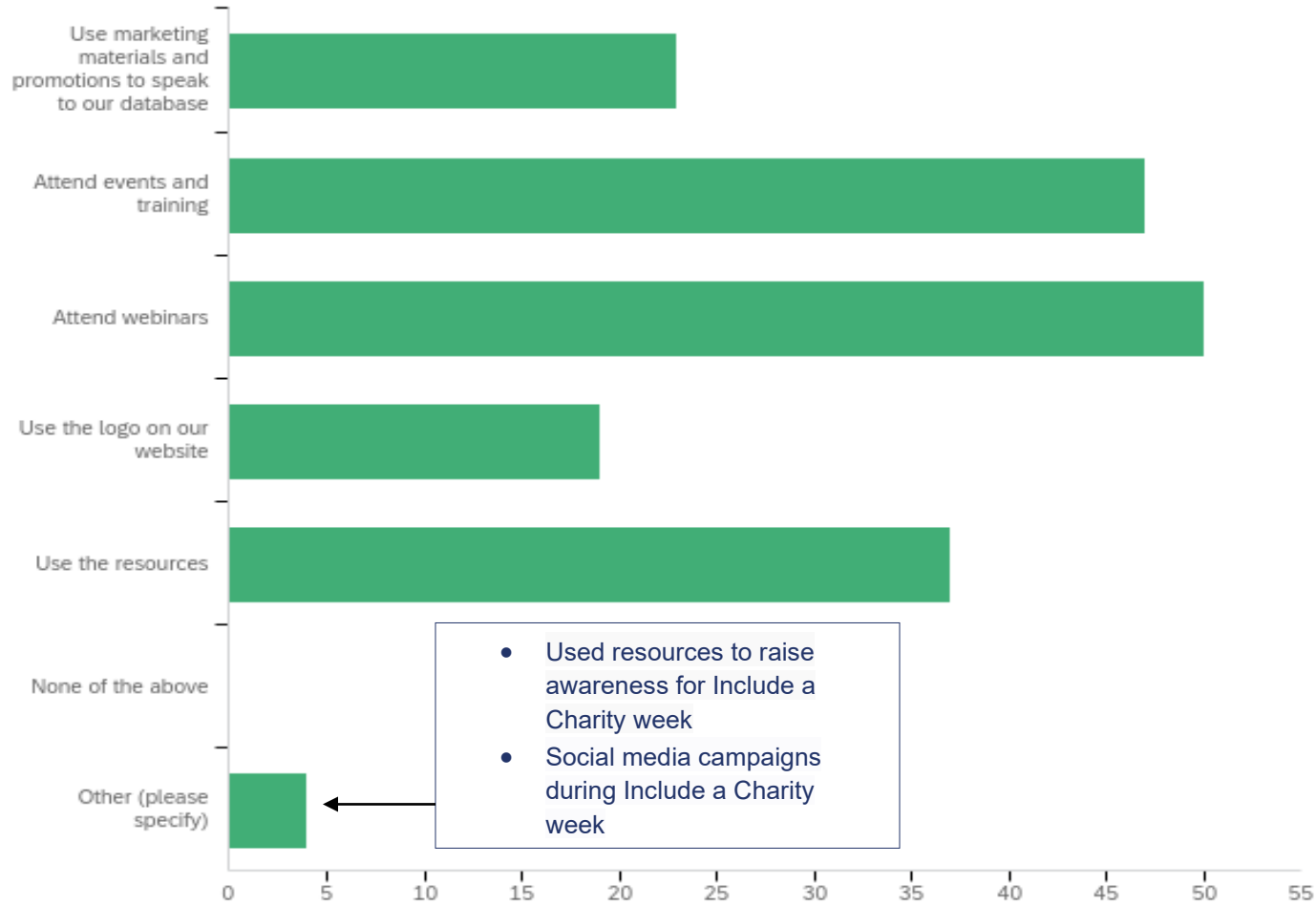
Q4 - Why is your organisation part of the Include a Charity campaign? Select all that apply.



Include a Charity 2021 Supporter Survey



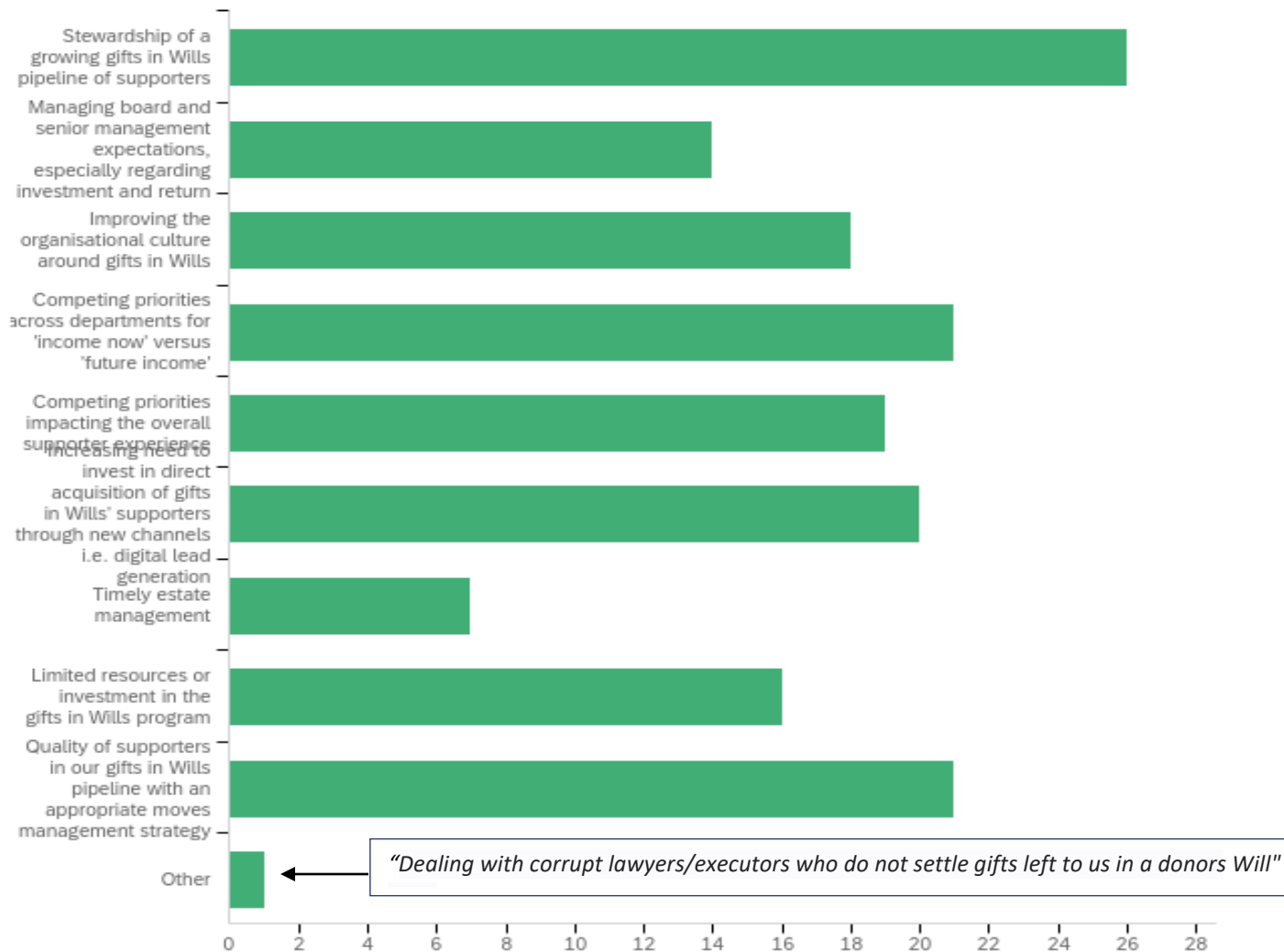
Q5 - How do you engage with Include a Charity? Select all that apply.



Include a Charity 2021 Supporter Survey



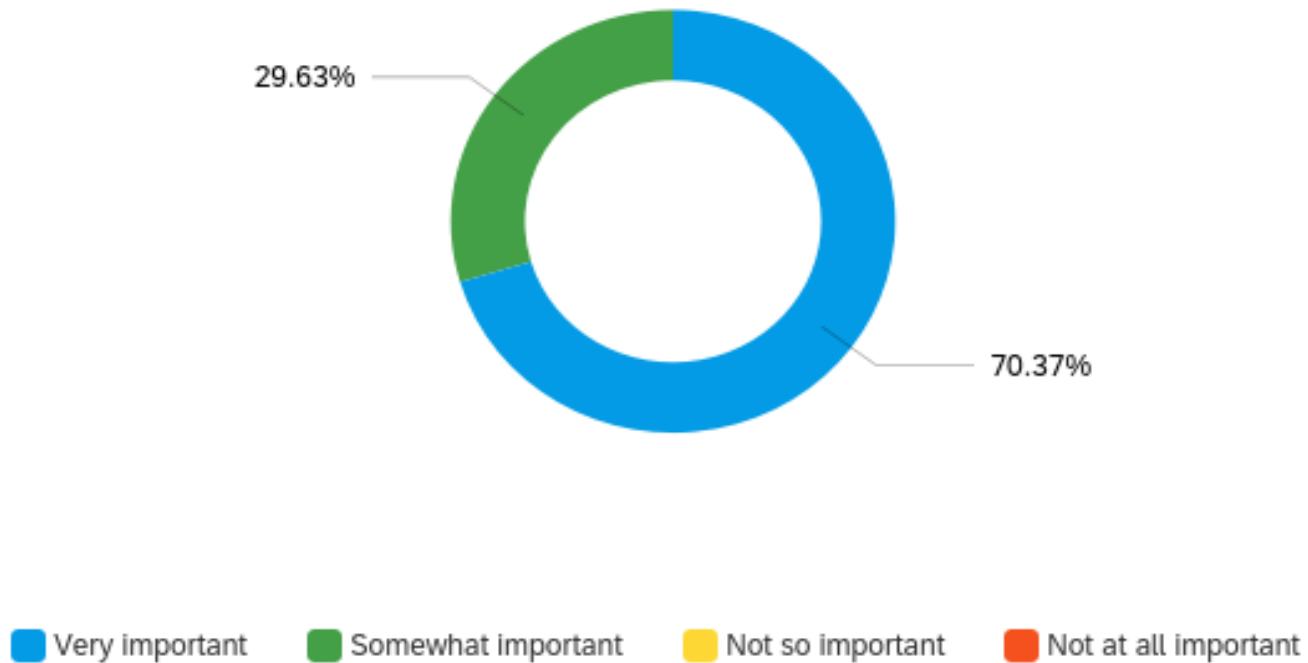
**Q6 - What are the major opportunities/challenges faced by your organisation in regard to your gifts in Wills program?
Select all that apply.**



Include a Charity 2021 Supporter Survey



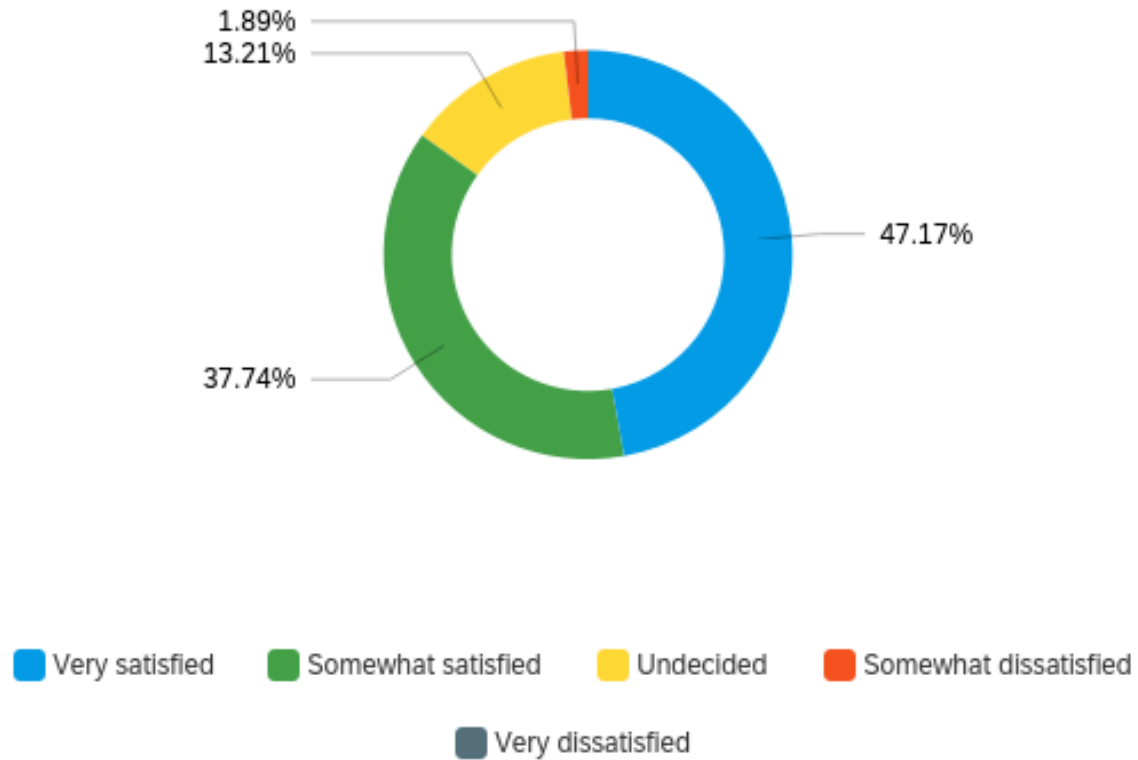
Q7 - How important do you think the Include a Charity campaign is?



Include a Charity 2021 Supporter Survey



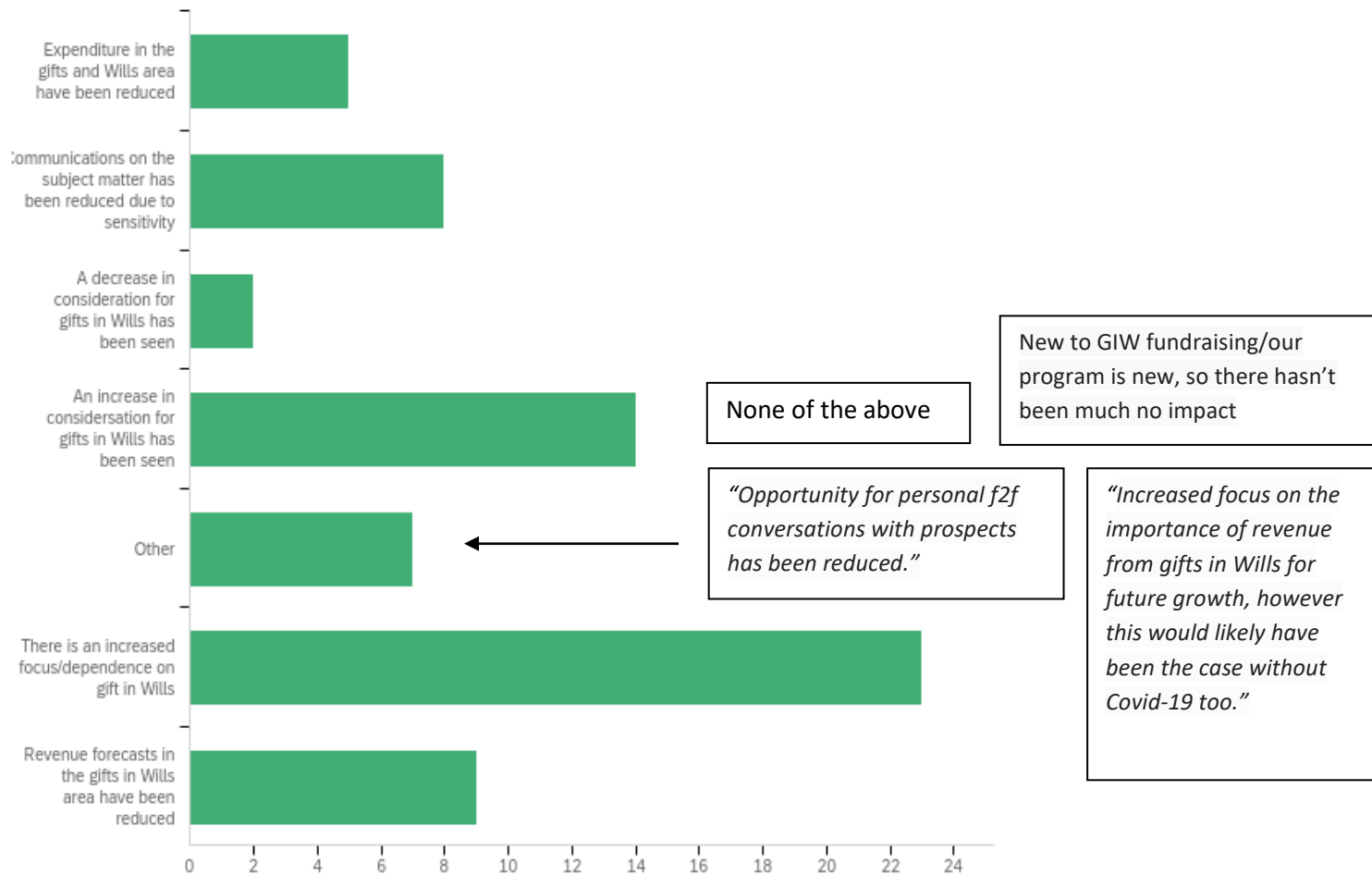
Q8 - How satisfied are you with the products and services delivered by Include a Charity on behalf of its members?



Include a Charity 2021 Supporter Survey



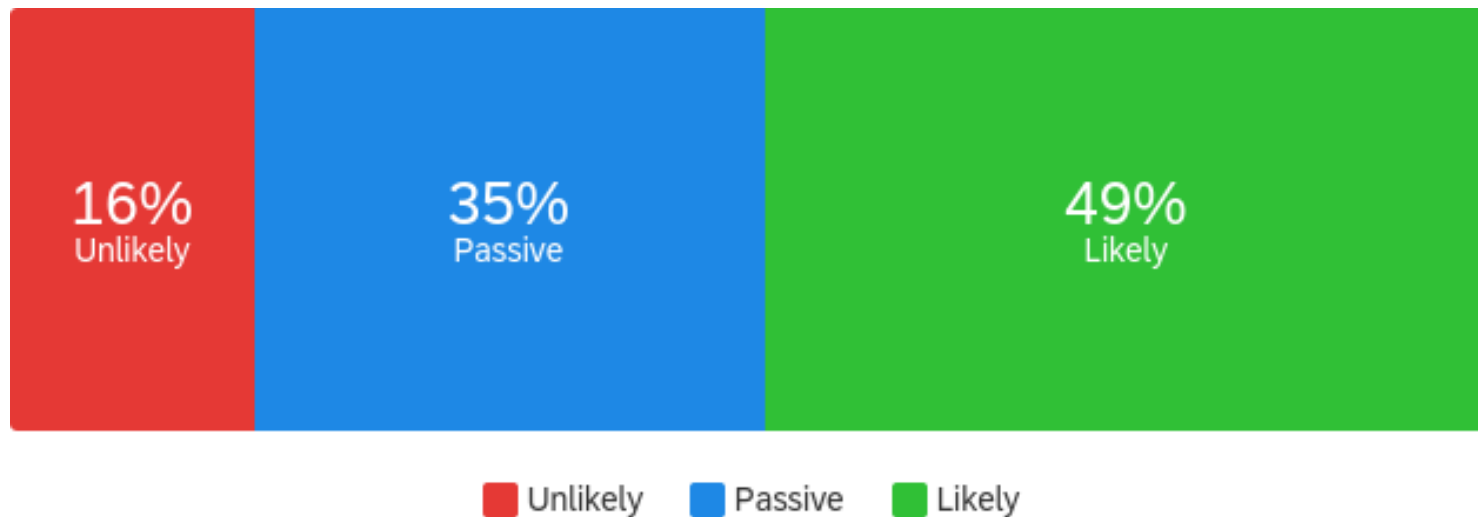
Q9 - Has the COVID-19 pandemic had an impact, realised or predicted, on fundraising within your organisation in any of the following ways? Select all that apply.



Include a Charity 2021 Supporter Survey



Q10 - If a colleague was looking to join Include a Charity, how likely would you be to recommend their charity joining?



*compared with *27% unlikely, 45% passive, and 27% likely in 2016

Include a Charity

2021 Supporter Survey



Q11 - We are in the process of writing our 3-year Include a Charity strategy. What else would you like to tell us to assist with this process or the success of Include a Charity?

<p>Event management for gifts in wills donors</p>	<p>More communication between charity and IAC (clarify what the program was for publicity for that week, or for any ongoing campaigns to raise awareness by IAC for all our organisations)</p>	<p>How should we be preparing for our next generation of wealth group to come along who will be far more online than the past generation.</p>	<p>We need an organisation like they have in UK where Wills are stored and analysed and people are informed when someone passes.</p>	<p>There needs to be more awareness of the different skills required in a GIW practitioner - we are leaving the days of one person undertaking all the roles for many/most charities. Recognition of the differing skills required. Different IAC events for different roles? Managers, relationship staff, estates admin staff, Marketers</p>
<p>The cost of belonging to Include a Charity is very high which is daunting for charities on a limited budget</p>	<p>State based strategies and resources would be helpful. Also state-based data for participants after each IAC campaign.</p>	<p>Shout what you do from the rooftops! Be bold, be as loud as the grant writers or the Philanthropic donor sectors. This is such an untapped market, why shouldn't people be empowered to leave a</p>	<p>More webinars</p>	<p>Release promotional assets earlier so they can be incorporated into advance planning.</p>

Include a Charity

2021 Supporter Survey



		legacy in their will.		
More 'campaign' review webinar/events. It would be great to showcase to our leadership team the success of IAC campaign.	More of a presence in WA	Include smaller charities	Make sure all resources and data are up to date and easily available. Management is increasingly requiring reporting and having examples/benchmarking quickly available is essential.	Build on what you have done and work with government to bring about more opportunities/advantages for donors when they consider a gift in their will.
Lobby the Government to incentivise leaving a GIW with taxation incentives like the UK do.	Provide 'getting started' materials for new staff or small charities that are new to GIW, is helpful.	Improve above the line exposure and education with solicitors.	The quality of presenters and information at the IAC conference was exceptional. It was great to have a conference dedicated to GIW's so it would be great to continue to hold it every year.	It's awesome!
Provide more training videos produced about the technological side of estate/pipeline management. Individual charities have recommended various forms of tracking/data collection - but it would be	Provide good usable facts about Gifts in wills and who leaves a bequest. Profiles of donors that GIW.	I am interested in learning - demographic trends, overseas Gift in Will program experience, online wills platforms, digital marketing	More benchmarking, forecasting and networking opportunities.	Getting the budget to join is an issue, it is perceived to be very expensive for the value/benefit return

Include a Charity

2021 Supporter Survey



**INCLUDE
A CHARITY**
Make your mark

great to see examples of this.				
<p>During IAC Week, the focus is to promote IAC as an organisation, the job you are doing and your role and not a strong enough focus on the importance of making a Will and including your favourite charity/s in it. Please consider an 'always on' campaign running through the year for broader and bigger community reach.</p>	<p>IAC week is confusing and am not sure of the outcomes. Eg. there was talk of accessing lists, and reports following the week but not follow up. It's not clear what was achieved or how our charity can gain further benefit from the activity.</p>	<p>Provide training earlier and not during IAC week.</p>		

Include a Charity 2021 Supporter Survey



Q12 - For lapsed members, why have you decided not to renew?

