

Include a Charity 2022 Strategy

The strategy for Include a Charity is reviewed and revised each year. The 2022 Strategy builds on gains made in 2021 in membership growth and retention as well as in additional offerings for members. Refinements to the strategy include a sharper focus on Include a Charity leadership in gifts in Wills fundraising in Australia in order to increase investment in this critical channel.

Purpose and Strategic Intent

The purpose of Include a Charity remains a social change campaign targeting the Australian community to influence consideration of leaving a gift in a Will.

Campaign Objectives 2021 - 2022



Social Change

Increase the consideration of over 55-year-old Australians to leave a charitable gift in their Will from 21% to 25%.



Sector Leadership

Lead the gifts in Wills fundraising sector through advocacy, research, knowledge sharing and capability building.

What are we trying to achieve?

Social Change

Include a Charity intends to continue its remit to increase the number of Australians who consider leaving a charitable gift in their Will through normalising the message and creating increased 'talkability' about leaving a gift in a Will, to ultimately encourage this form of giving.

We will do this by:

- Providing training and ongoing professional development for gifts in Wills fundraisers to help them achieve better results.
- Deliver Include a Charity Week and other campaign opportunities throughout the year to lift the profile of Include a Charity and leaving a gift in a Will.
- Develop a sub-campaign to influence estate planners and other legal professionals
- Conduct a yearly supporter survey to ensure Include a Charity meets the needs of and delivers value to IAC members.

Sector Leadership

Include a Charity will additionally seek greater influence by additional focus on leadership in gifts in Wills fundraising in Australia.

We will do this by:

- Undertaking research to inform our members and the broader sector
- Supporting Australian charitable organisations with advanced best-practice knowledge and research around the channel of gifts in Wills fundraising and administration
- Advocating for investment in and the importance of the gifts in Wills channel in order to increase the volume and value of income from gifts in Wills.

Target

- Australians aged 55+ – primarily with no children; secondary with children
- Estate planning professionals and influencing bodies (including government)
- Charitable organisations who can be part of the campaign to increase its influence

Activities

Social Change

- Deliver opportunities for SIGs, state-based networking and other activities which facilitate knowledge sharing amongst members and the broader community.
- Deliver professional development opportunities including launching a new course on grief and bereavement or related and a one-day virtual conference for IAC members
- Deliver a compelling campaign for Include a Charity Week capitalising on the 2021 campaign including the Legends Quiz (potentially for other audiences).

Sector Leadership

- Upgrade public facing website to maintain the emotional journey for Australians to consider leaving a gift in their Will
- Develop research and research outcomes for organisations and boards to consider increasing investment in gifts in Wills fundraising
- Consider a 'Friends of IAC' Parliamentary Group to engage with Parliamentarians on the need for increased investment in gifts in Wills
- Work in partnership with Philanthropy Australia's Blueprint for Structured Giving on lobbying for changes to superannuation for the benefit of gifts in Wills.

Key Performance Indicators

- Successful delivery of Include a Charity Week and other public relations and marketing activities which raise the profile of Include a Charity and the opportunity to leave a gift in a Will
- Consideration of leaving a gift in a Will increases as measured in 2023 research
- Research is undertaken and delivered that provides important resource for members as well as opportunities for both PR and leadership in the sector around gifts in Wills fundraising
- Supporter survey shows
 - increases in member satisfaction of Include a Charity
 - increases in members taking part in Include a Charity Week
 - increases in members agreeing Include a Charity is important