

## Bequest Clubs and Ambassadors

Ron Ellis OAM

Room

Friday 25<sup>th</sup> February, 2011

11am-12pm

## Content

- Recruiting
- Involving your 'Team'
- Nurturing Activities
- Setting up your Clubs
- VIP Treatment for 'Bequestors'
- Members' Lounge

## For Best Bequest Results...

- A comprehensive 'Planned Giving Program'  
**with**
- Integrated Strategies and Initiatives

## Bequest Clubs and Ambassadors

- Can lead to significant increase in Legacy Income

## Ambassadors

- Our People Targets -  
mainly from within our own constituencies

## Targeted Recruitment

- Recruit known 'Bequestors' for your 'TEAM OF AMBASSADORS' especially -
- Suitable 'HIGH PROFILE' Bequestors

## Your 'Team of Ambassadors'

- Can assist to conduct a variety of 'NURTURING ACTIVITIES'

## Bequest Clubs

- Can attract Legacies and help retain Bequestors as 'FRIENDS FOR LIFE'



## Setting up your Clubs

- ‘Key Supporters’ Club’ from your Constituency
- 5 Years support – Past or Present
- Certificate – Badge - Newsletter

## Key Supporters' Club

- 5 Years support – PAST or Present
- Can help reactivate 'Lapsed Donors'

## Bequestors' Club

- Exclusive for those including bequests in Wills
- Special Certificate – Badge - Newsletter

## Treat Known Bequestors as VIPs

- Do something ‘special’ to mark ‘Will Inclusion’ or ‘Major Gifting’
- This strengthens the ‘Commitment’

## Members' Lounge

- For both 'Benefactors' and Key Supporters' Club members

## Conclusion

- We must NURTURE our Family of Supporters and try to retain them as FRIENDS FOR LIFE

## Ambassadors & Bequest Clubs

**Kathryn Johnston**

**Fundraising Manager, Epworth Medical Foundation**

**Friday 25<sup>th</sup> February, 2011**

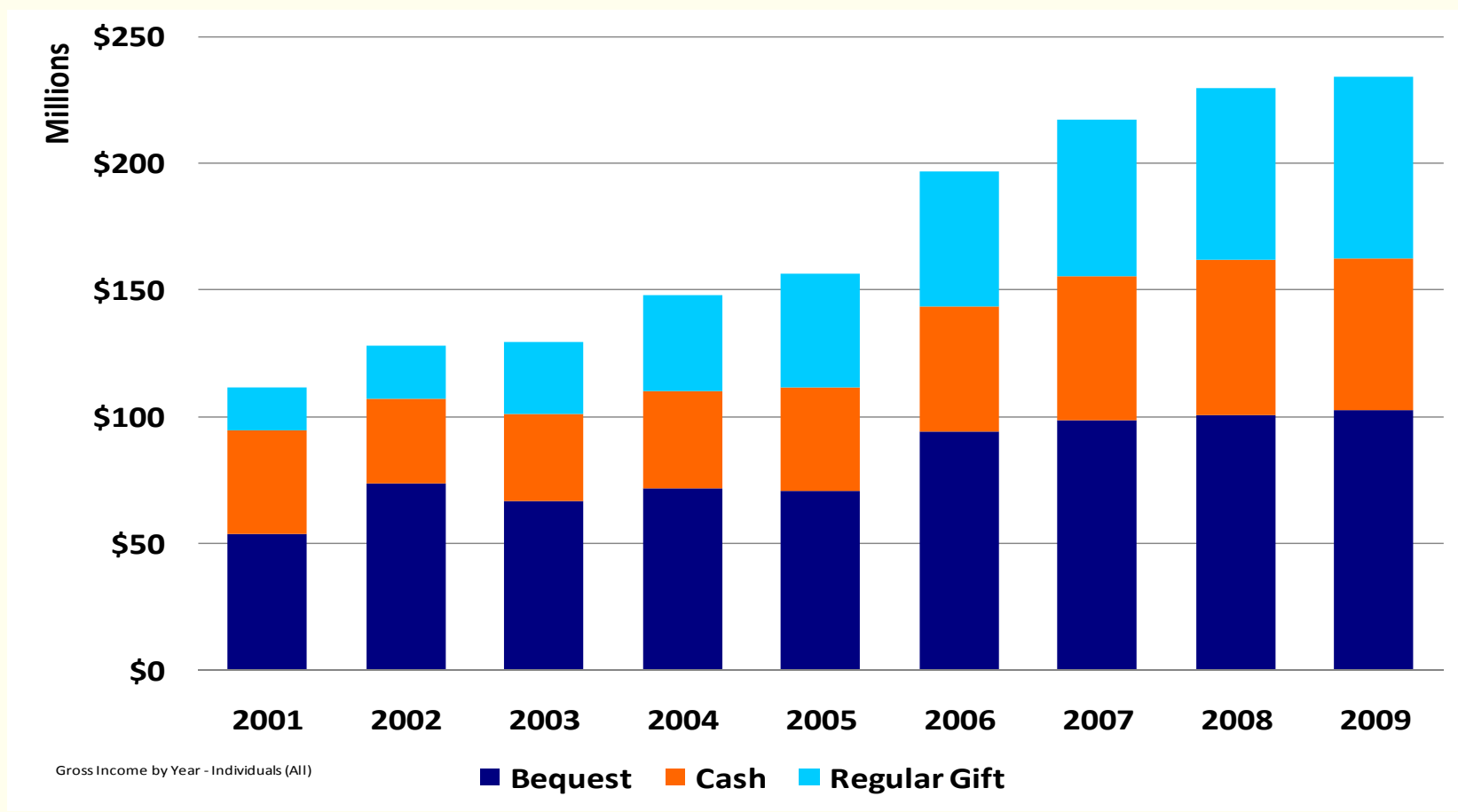
**11.00 am – 12.00 noon**

## In Brief

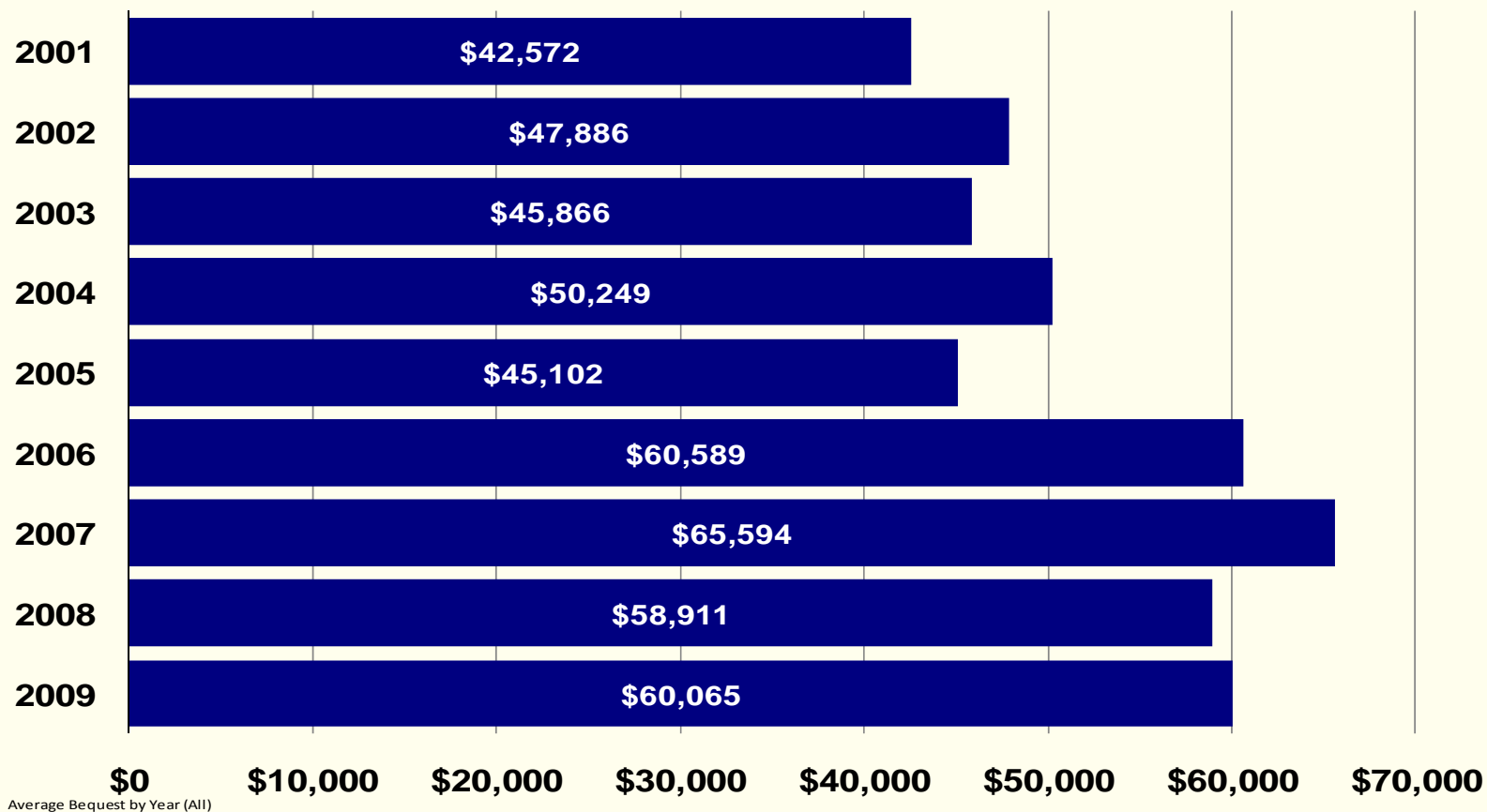
- The importance of a bequest strategy
- The function of a bequest club
- The role of an ambassador
- The smaller charity's perspective



# Gross income by year



## Average bequest by year



## Why have a Bequest Club?

- To efficiently steward those who have left a bequest
- To make members feel special, unique, part of the inner circle
- To provide special benefits to benefactors
- To keep benefactors informed of milestones & achievements
- To keep benefactors linked to the organisation
- To encourage others to leave a bequest

## What can a Bequest Club offer?

- Honour Roll listing (excluding anonymous)
- Token benefits such as certificates, lapel pins, pens
- Regular communications including newsletters, annual reports
- Invitations to events such as club lunches & celebrations
- Gifts such as book publications & branded merchandise
- VIP treatment (quite valuable in some sectors)

## How do I promote the Bequest Club?

- Communication
  - newsletters
  - brochures
  - direct mail
  - website
  - presentations
- Ambassadors to promote the club

Position Description

# AMBASSADOR

## Essential criteria

- Passionate about the cause
- Strong link to the organisation
- Committed to the organisation's vision for the future
- Optimistic outlook and positive attitude
- Highly respected, high integrity, credible, sincere, honest

## Desirable Criteria

- Legitimate member of the club  
(left a bequest to the organisation)
- Good communication skills – verbal and written



## Responsibilities

- Promote the charity through personal & professional networks
- Provide written testimonials within collateral
- Provide verbal testimonials at donor forums & seminars
- To endorse the charity within the media

## Where will I find an ambassador?

- For a large charity:  
A well-respected, high profile celebrity is a great ambassador
- For a small charity:  
Look within your own ranks

## Epworth's ambassadors

Past & present:

- President & members of the board of management
- Chair & Trustees of the Foundation
- Group Chief Executive & members of the executive
- Staff
- Volunteers
- Donors

## What have Epworth ambassadors done?

- Welcome messages in bequest booklets
- Testimonials in newsletters & brochures
- Spokespersons at functions
- Networking at events

## Wrap up

- Bequests can make up to 60% of total fundraising income
- A Bequest Club is an efficient method of stewardship
- Look for ambassadors to champion your cause
- Don't underestimate those within your own ranks
- You may have a committed band of ambassadors  
...right under your nose!

## Bequest Clubs and Ambassadors

Rod Reeve

Territorial Director Wills & Bequests

The Salvation Army – Australia Southern Territory

Friday 25<sup>th</sup> February 2011

11.00 am – 12.00 noon

Research commissioned by The Salvation Army and undertaken by Roy Morgan Research in late 2009:

Findings:

36.1% of Australians over 25 do not have a Will

17.8% of Australians over 50 do not have a Will

There are 3,626,639 Australians 50-65

There are 2,915,420 Australians 65+

6.2% of Australians have included a Charity in their Will

13.0% of Australians (25+) have never thought about including a bequest to charity in their Will

100.0% of Australians over 100 (4,928) can't leave any of their estate to their parents!



BUT

If you haven't got a Will  
You can't leave a bequest  
no matter how good  
your intentions might be!

- Australian Bureau of Statistics data shows:
- Australia's population at 30 June 2010 was estimated at  
22,558,640
- One birth every 1 minute and 44 seconds
- One death every 3 minutes and 44 seconds
- The market for bequesting is HUGE and growing daily – unless you are not getting older!

- Finding potential bequestors - examples:
- Newspapers, Seniors Magazines
- Radio, TV
- Expos, Shopping Centres
- Solicitors
- Existing donors – don't overlook their value
- Website – how friendly is your website?
  
- Cost justification
- Any opportunity needs to be taken to promote your bequest programme

- Why would any charity invest time and resources in a bequest club?
- It's all about creating and maintaining relationships
- Your supporters need to know you care about them not just the \$\$\$\$
- Most supporters will say they don't want acknowledgement but the presentation of a certificate or small (low cost) token of appreciation is always of immense value
- The 2 most critical words "THANK YOU" cannot be underestimated or over used

- Do all supporters let you know they are a bequestor?
- Most don't – why not?
- Changed family or financial circumstances
- They may fall out of love with you – for the smallest reason
  
- Keep relationships warm – how?
- Cards/notes at special times, relevant news / magazine clippings

- Special events are of great benefit – concerts, morning or afternoon teas, luncheon, come see tour of facilities / programme – with guest speaker(s) talking about what is being achieved – special projects? - as a result of the donors support
- By seeing your charity in action they sense a real partnership with you – so if it's to hold a puppy, hug a whale, meet people who's lives have been changed or improved because of their support, make it happen!

- Always the tricky thing is the fact that unless your bequestors (or potential bequestors) are also regular donors your charity may not receive any funds until many years down the track (and in fact probably not until a long time after you have moved on!)
- It's all about sowing seeds now and watering them so that the "crop" in the future will be significant
- The challenge of course is keeping track of bequestors – awareness of location changes, advice of death

- Ambassadors
- What are the benefits?
- What are the considerations?
- What is your target market?
- What qualities do you want your candidate to have? –
- Is the person well-known – recognized – nationally – locally?
- Is the person respected – claim to fame?
- What is likely cost?
- Period of engagement?
- What are they prepared to do for you?



- Do they hold similar philosophical ideals as your organization?
- Do they have a Will?
- Is it important that they are a bequestor?
- Depending on choice it's all about timing, it's all about fit
- TSA experience

- Celebrity Ambassadors – The Salvation Army
- Dawn Fraser – 1997/1998
- Evonne Goolagong - Cawley – 2001/2002
- Justin Langer – 2010/2011

- Is it worth the effort and investment? **I think so!!**
- 550 bequests confirmed
- Ave (say \$60,000)
- \$33,000,000

- With so many options to potential bequestors why would they (why should they) choose you – what makes you stand out?
- What is it about your organization that would motivate people to want to support with a bequest?
- Why have they aligned themselves to you?
- There are many options
- It's all about passion
- How passionate are you?
- Have you included a bequest to (your) charity in your Will – in fact have you even got a Will?

- **An ambassador won't get your charity bequests but can open doors that you might otherwise not get through**
- **The rest is up to you!**

- Both Bequest Clubs and the involvement of Ambassadors are worthy considerations to gain bequests and build relationships but what will be of ultimate benefit to your charity depends on the will - and investment - your executive is prepared to make.
- One important point – the ROI for a bequest programme clearly demonstrates the value of bequests
- **The biggest donation anyone will make will be a bequest**

# INSPIRED

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