



BEQUESTS/GIFTS IN WILLS

Submission Guide





NATIONAL AWARDS FOR EXCELLENCE IN FUNDRAISING

Contents

| | |
|--|---|
| Contents | 2 |
| About the Awards | 3 |
| Bequests/Gifts in Wills | 3 |
| Award Requirements | 3 |
| Nomination Form | 4 |
| Need help? | 4 |
| Submission Form Questions for Bequests/Gifts in Wills..... | 4 |
| Terms and Conditions of Entry..... | 7 |



NATIONAL AWARDS FOR EXCELLENCE IN FUNDRAISING

About the Awards

The Awards for Excellence in Fundraising are a key component of Fundraising Institute Australia's commitment to champion best practice in fundraising.

The Awards recognise the outstanding initiatives and innovative efforts of fundraisers, volunteers and organisations. They celebrate the hard work and successes across the year, provide an opportunity for acknowledgement by your peers, and promote the role of fundraising in improving our society.

Bequests/Gifts in Wills

The focus of the award is on the effectiveness of a Bequests/Gifts in Wills Campaign, based on the campaign's objectives.

The Bequests/Gifts in Wills Category will be judged under two divisions. The divisions are:

- Organisation's with annual fundraising revenue* of \$5 million or less (including bequest income)
- Organisation's with annual fundraising revenue* of more than \$5 million (including bequest income)

*Fundraising revenue is considered income that has been raised by the fundraising team / fundraiser via fundraising programs, in other words it is income derived from charitable giving. Therefore, by its nature it excludes government grants, investments, fee for service, interest etc.

Award Requirements

This submission must be completed and signed by a member of FIA and the CEO/Financial Controller or equivalent. If you are not a current member or are unsure of your membership status please call 1300 889 670.

Campaigns must be conducted during the last 18 months (1 March 2017 to 31 August 2018) to be eligible for an award.

How to Enter:

Step 1: Complete Submission form (*please see link below*)

Step 2: Complete Metrics (*only needed for organisation awards categories*)

Step 3: Click [here](#) to submit online nomination form, and upload submission with supporting documents.



NATIONAL AWARDS FOR EXCELLENCE IN FUNDRAISING

Nomination Form

You will need to fill in the following [submission form](#).

Please see below for a list of information you will need to prepare and questions you will need to answer in order to complete the nomination form. All questions listed require answers.

The cost to submit your nomination is \$100 inc gst.

Applications close on Monday 10 September 2018.

Need help?

If you need assistance with your nomination, please contact FIA on 1300 889 670, or email training@fia.org.au

Submission Form Questions for Bequests/Gifts in Wills

CONTACT PERSON DETAILS

- Contact First Name
- Contact Last Name
- Contact Email Address
- Position
- Organisation
- Phone number
- Address details

CEO/FINANCIAL CONTROLLER OR EQUIVALENT DETAILS

- Full name
- Position
- Phone number and email address

ORGANISATIONAL INFORMATION

- Number of full time fundraising professionals on staff
- Annual fundraising turnover of the organisation (including bequest revenue)
- Revenue from bequest gifts only from your last complete reporting year (either calendar or financial year)
- The annual average revenue received from bequest gifts, averaged out over the past five-year period

CERTIFICATE OF RECOGNITION

Please include the names of up to six key personnel or key contributors (agencies/suppliers etc) involved in the program/campaign/project submitted for this entry. Only those listed



NATIONAL AWARDS FOR EXCELLENCE IN FUNDRAISING

will be issued individual award certificates as per this form. Please ensure that the names below are spelt correctly. FIA will not reprint certificates if these names are spelt incorrectly.

PERIOD OF CAMPAIGN

Campaigns must be conducted during the last 18 months: 1 March 2017 to 31 August 2018.

Date Campaign Commenced:

Date Campaign Concluded:

CAMPAIGN TITLE

Please use the exact title that you wish to appear in all documentation including, but not limited to, media releases, certificates and trophies. Spelling will be taken as it appears.

CAMPAIGN INFORMATION REQUIRED

As a general rule it is expected that no more than 300 words would be required in each section, but feel free to go over that suggestion if required.

- **Executive Summary, Case Statement and Background to Entry**

This information should be a comprehensive summary describing the Bequests/Gifts in Wills award entry. This information will appear in all introductions and FIA publications and media releases for winning entries. It may include summary information on:

- your identified target market;
- whether the focus of the bequest campaign was identification of bequest interest from existing warm supporters or new cold audiences, conversion of existing bequest considerers to confirmed or upgrading of existing bequestors
- problems encountered and how you overcame them;
- opportunities that were presented and how you took advantage of them;
- the fundraising objectives achieved as well as how this bequest/gifts in Wills campaign enhanced the overall fundraising strategy of the organisation.

Points available 20/100

- **Campaign Strategy**

Please detail campaign strategy, implementation plan and the fundraising channels used. What other fundraising elements did you incorporate into the bequest campaign e.g. cash gift or event etc? Did these impact on your bequest outcomes and how? If not, why did you decide against it? Provide evidence of creativity and innovation deployed in the campaign. Discuss the impact that creativity and innovation had on the success of the campaign.

Points available 20/100

- **Additional Resources used in the Campaign**

List any additional resources used for this campaign such as volunteers and consultants. Please include details on the contribution each resource made to the overall success of the project. For example, staff resources used to monitor social



NATIONAL AWARDS FOR EXCELLENCE IN FUNDRAISING

media activity of the organisation or volunteers used to engage supporters during the campaign.

Points available 10/100

- **Lessons Learned**

What lessons were learned during the campaign? Is the campaign able or planned to be replicated? How will you now build upon the successful bequest outcomes of this campaign?

Points available 10/100

- **Donor Relationship Building and Stewardship**

Describe how the campaign strengthened your relationships or understanding of your bequest supporters. Did the campaign increase awareness of your organisation, mission or cause to an external / cold audience? How did the campaign acknowledge and recognise your bequest donors? Describe how you will now continue the relationships with the supporters you engaged or identified during the campaign through to the fulfilment of their bequest gifts. Provide evidence of how you ensured ethical fundraising was undertaken.

Points available 20/100

- **Campaign Measurement**

Please tell us how you measured the campaign's performance? What were the key metrics? What were the results vs your expectations. What did you learn from these results?

In addition, please complete the metrics spreadsheet ([download here](#)). Complete only those sections that apply to your campaign and only complete the highlighted cells as formulas have been entered into the non-highlighted cells to calculate metrics based on your information. If the tables provided do not adequately allow you to show your key metrics please feel free to provide your own metrics table.

Points available 10/100

- **Final Outcome of Campaign**

Provide a summary of your results, describing the impact that the campaign has had on furthering your bequest fundraising program, either in terms of identifying new bequest supporters, converting existing bequest supporters from consideration to action or introducing bequest messaging to a new audience for future conversion activity. Explain what future anticipated income from bequest gifts will be achieved as a result of your campaign. If there were additional fundraising strategies implemented in your bequest campaign, describe how this was impacted on your campaign.

Points available 10/100

SUPPORTING DOCUMENTS

- A maximum of three pieces of supporting material for your submission.



NATIONAL AWARDS FOR EXCELLENCE IN FUNDRAISING

- A video, audio, Powerpoint presentation or other media suitable for showing at FIA's Conference Gala Awards Dinner. This could be one of the three pieces of supporting material or an additional piece.
- The logo of the organisation the nominee represents (high res EPS or JPG minimum 600dpi).
- At least two images suitable for the 2019 Awards publication.
- List of key suppliers, contractors, supporters and personnel.

Please note that these materials may be used in Powerpoint presentations and other published materials related to the Awards. FIA reserves the right to reproduce entries in all FIA publications and in other promotional materials, including the FIA website and media releases.

Terms and Conditions of Entry

1. Organisations submitting an entry must employ at least one current individual member of FIA (minimum MFIA). Alternatively, the submitting organisation or consultancy must be an organisational member of FIA.
2. If the entry is being submitted by a consultant the CEO/Financial Controller/or equivalent of the submitting charity must endorse the entry form.
3. Entries can be submitted in more than one category. An entry fee applies each time the entry is submitted.
4. Payment of the entry fee must be made before a submission is considered complete.
5. No alterations to entries will be permitted after the closing date.
6. Entries will not be accepted unless they are complete and submitted according to guidelines.
7. Certificates will be presented to the persons named on the submission form to a maximum of six (6) people and an award will be presented to the organisation listing those named.
8. FIA reserves the right to use any/all submission material entered for promotion of the Awards. FIA may use aggregated data for purposes of research on fundraising benchmarks.
9. Under no circumstances shall FIA be held responsible for the payment of any royalties or other charges for the use of materials provided in support of the awards. All entries become the property of the FIA on submission.
10. Judges reserve the right to withhold awards at their discretion if entries received are not meritorious. The decision of the judges will be final and no correspondence will be



**NATIONAL AWARDS
FOR EXCELLENCE
IN FUNDRAISING**

entered into. FIA accepts no responsibility or liability for any loss of commercial privilege or any other thing which constitutes loss or damage as a result of an entry in the FIA Awards for Excellence in Fundraising.