

IT'S YOUR CONFERENCE

FIA CONFERENCE 2022

YOUR PASSION ◦ YOUR PEOPLE ◦ YOUR PLACE



How to build a strong mid-value case for support. Creating rich story-driven experiences for mid-value donors.

MIDDLE MAJOR & PHILANTHROPY

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Research &
Consulting
specialist prospect research services for fundraisers

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Agenda

Australian Red Cross grew its mid-value program by \$1m in just nine months.
Here's how we did it:

1. Understand your mid-value donors.
2. Design a mid-value case for support.
3. Deliver and measure.

Background to Red Cross' mid-value program



Lenny's favourite mid-value CX questions

Tell me about you

- What current issues or causes are of particular interest to you? Why are they important?

Describe our mission

- How would you describe our mission? What causes / areas come to mind?
- What other organisations / charities address this issue effectively? How do we compare?

Describe your experience with us

- Tell us about your experience with us. What was great about it, or wasn't.

Other organisations and the charitable sector

- What other charities do you support? Tell me more about them.
- Do you give at an equal value, less, or more each year to each of the other charities?
- Have you considered maximising your charitable impact by consolidating your contributions by giving one large gift to a charity each year?

Your perfect charity

- What does impact look like to you? What makes you feel like you've made a difference?

A case study from the CX interviews

I'm retired. Had worked for the Greens. Very environmentally aware



I give to many charities at tax and Christmas. Will give more when it's urgent.

I am generally not highly responsive, I am quite considered and rational in my charitable giving.

Interested in giving more to less to maximise my impact, but I'd expect a deeper relationship.

Principles for building a strong mid-value case for support

Cut through the noise

- Inspire me
- Make me feel proud by seeing you in the media

Be memorable & engaging

- Help me see impact and feel good about my choice
- Make me feel like I am making a difference

Don't sell to me. Educate me.

- Stories, stats and facts
- Share more complex projects

On their terms.

- Their Choice
- Right place right time
- Right commitment
- Right ask
- Right channel

Build a connection

- Tell me how to make a bigger impact
- Talk about longer term projects

Start off with alignment on intentions

What kind of experience do you want your mid-value donors to have?

What do you want them to think and feel?

What insights do you have?

What do you wish to know?

Who will be your champions and story tellers?

What victory are you asking mid-value donors to help your charity achieve?

How we approach the process

- ❑ Curiosity
- ❑ Vulnerability
- ❑ Discovery (workshop)
- ❑ Tailoring

Curiosity

“The greatest problem with communication is we don’t listen to understand. We listen to reply. When we listen with curiosity, we don’t listen with the intent to reply. We listen for what’s behind the words.”

— Roy T. Bennett, The Light in the Heart

Why does this matter?

Sometimes, we're so eager to execute that we don't step back, pause, ask questions, ask more questions, wait, and then wait some more for the breakthrough.

Without curiosity we would not have uncovered the really "juicy" insights that we discovered in the workshop, I'll come to the juicy stuff soon...

Vulnerability

“Vulnerability is the core, the heart, the centre, of meaningful human experiences.”

— *Brené Brown, Daring Greatly*

Why does this matter?

Fundraising perspective - “What do I want the donor to think and feel?” “What is the donor’s role in the story?”
“What is the special opportunity that the donor is being exposed to?”

Programs perspective - “This is what we do.”, “This is WHY we do it in a specific way with specialists and experts”.

Brand perspective - “This is how we want to be seen as a brand and remembered in the minds of our supporters.”

Workshop

1

Uncover shared perspectives

2

What will move people and why

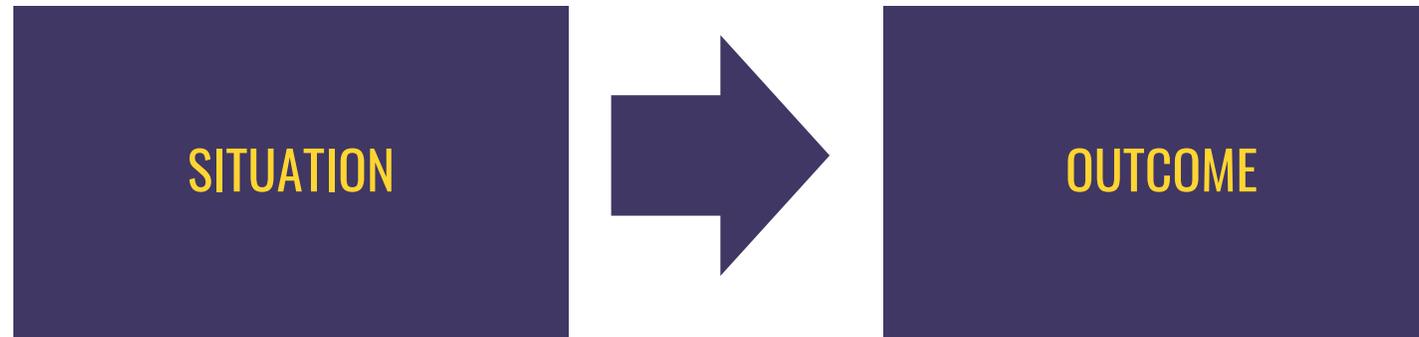
3

Tailoring the offer

4

Interrogating the space in between the current situation and the ideal outcome

Uncovering shared perspectives



Problem and solution table

WORKSHEET &
DISCUSS

Activity two: Problem and solution

What is the problem solution dynamic?	PROBLEM	<i>A clear outline of the problem that exists. This should reflect the truthful experiences of those affected, and ARC's (expert) view on <u>why</u> this is wrong. It should be specific and concrete.</i>
	SOLUTION	<i>A description of how ARC's work actually meets the above problem and takes it away. This should identify how money is used to achieve that.</i>



Audience tensions

Your cause



Their life



Worksheet: Your cause

Worksheet

Please describe the core issue and how your audience feels towards it. Write your answers in the boxes below.

What issue are we trying to solve?
(In a sentence, or two)

How does your audience feel about that issue?
*Do they always find it concerning or not?
Do they feel most strongly when the issue affects certain groups?*

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Worksheet: Their life

Worksheet

Please describe what beliefs your audience holds about the way the issue affects people. How do they feel about people doing it tough? Write your answers in the boxes below.

What beliefs do they hold that are challenged by the way this issue affects people?
What is 'jarring' about the issue, does it conflict with the audience's core values and beliefs?

- There is also a recurring theme throughout that it is an ingrained behaviour (something we are brought up to do, something that feels 'right')



Because everyone at this time of the season deserves to have joy and happiness

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Tailoring the offer to appeal to them

Tailoring the problem and solution to their need states

Winter Appeal 2021	Audience need state	Tailored offer
PROBLEM:	MV: Help me understand the problem on a deeper, more 'educated' level, give access to the experts' insights.	MV:
SOLUTION:	MV: I want to feel that I am contributing to something special that is not mainstream. I want cost transparency, innovative and long term solutions.	MV:

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Yeah, but how?



Yeah, but how?



■ How did you become a tracing field officer?

I'm from Lebanon, a country where people go missing every day because of ongoing political conflicts. I have seen people's distress and anxiety because they have no idea where their loved ones are.

After graduating from university, I worked with Caritas International as a social worker. I met many people from Iraq and Syria who had migrated to Lebanon because of war and were waiting to be resettled to another country. These amazing people expressed their frustration and worry about their families still living in conflict zones. We would refer them to the Lebanese Red Cross and the International Committee of the Red Cross (ICRC) who would try to locate their loved ones.

For a while, I was also a prison social worker in Lebanon working with minors from Middle Eastern countries. The ICRC would visit them and deliver messages from their families overseas.

Then in 2013, I moved to Australia and started working with Australian Red Cross as a caseworker in the Migration Support Programs. I was so happy to hear about the tracing service here and their amazing work. I helped the tracing team as an Arabic and French interpreter and document translator. Then approximately four years ago, I applied for a Restoring Family Links Field Officer position based in Sydney.

■ What does your typical work week involve?

At any one time I'm working on aspects of many different cases. They involve searching for missing people as well as requesting evidence of time in detention, helping families exchange news, and following up health and welfare cases. My day often starts with following up emails that have come in overnight from the ICRC or Red Cross and Red Crescent National Societies overseas. They might send us a new case or extra information about an active one. They could be asking for a progress report or sending us a progress report.

Most weeks I have interviews with new clients or make calls to existing clients to check on their wellbeing and see if they have any updates. Of course, a big part of my role is investigative work, following up leads and desk and phone-based searches. Sometimes I will be out in the field chasing those leads too.

There are regular meetings with my team to talk about complex cases and to brainstorm alternative search options. And some days I will be answering calls to our national tracing hotline and actioning new enquiries.

Part of my role is also collaborating with counsellors, doctors, lawyers and other service providers who are supporting some of our clients. There is a lot of outreach work, too, with service providers and community groups to reach new people who might need our help but don't know about us.

Yeah, but how?

How we invest your donations

Annual budget Emergency Relief Program in Australia

A skilled team of nine staff and 54 volunteers, working across Australia. They provide complex casework support, appropriate referrals and work with people to overcome barriers to financial independence.

No two people's migration journey is the same and we tailor our support based on individual needs.

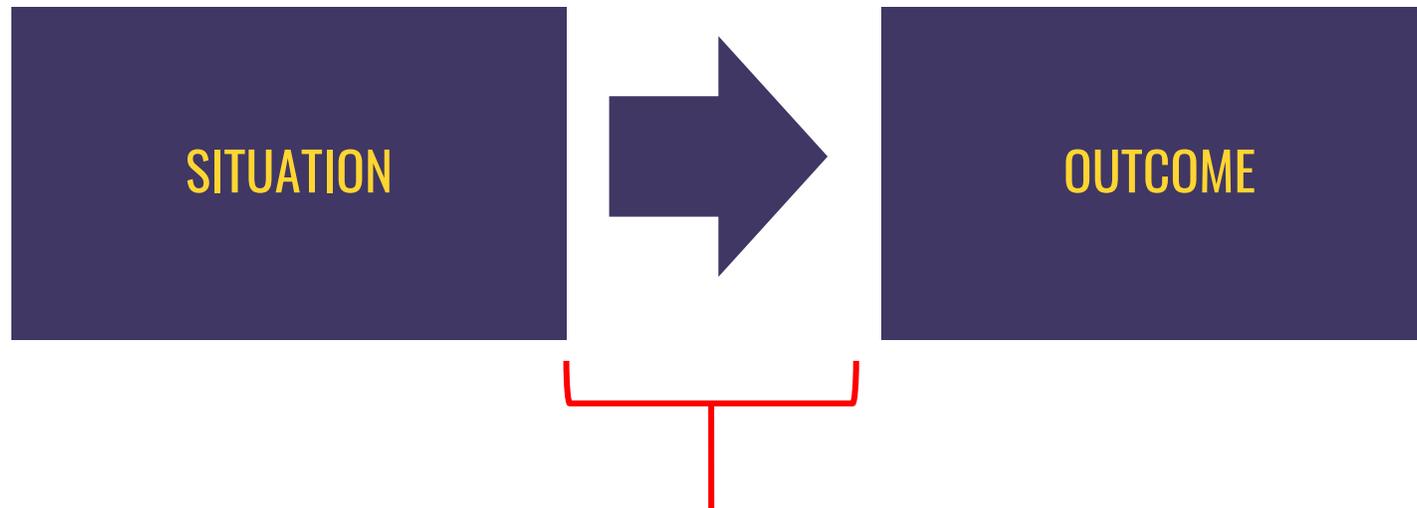
As well as this direct support and our advocacy role, we also collaborate and partner with organisations that are supporting people experiencing vulnerability Australia-wide.

COST ALLOCATION

Staff providing complex one-on-one casework support and helping people: <ul style="list-style-type: none">- As they build on their strengths and move towards financial independence- Find employment- Access education and training, and schooling for their children- Referrals to counselling, legal, visa and other services- Access food packages, basic healthcare and medicines- As well as social and community activities to establish networks	628,692
Cash payments to support people in financial crisis. This is the most dignified form of support as it lets people decide how to best meet their most vital needs. It can be used for: <ul style="list-style-type: none">- Groceries- Rent or accommodation- Other essentials to meet critical needs	390,000
Office rental and supplies	81,730
Translating and interpreting costs	10,000
TOTAL	\$1,110,422



Yeah, but how?



What happens here?
How do you get from the situation to the outcome?
Costs, procedures, staff members, experts, etc.

Yeah, but how?

“Our staff are our greatest resource because it really relies on great assessment and investigative skill to get answers on these cases, and the tenacity and perseverance they have is extraordinary”

- *Nic Batch, Australian Red Cross Protection Manager*

The "juicy" bit!



YOUR **PASSION** ◦ YOUR **PEOPLE** ◦ YOUR **PLACE**

Storytelling

“What we do is badass”

- Beth Comstock

Look for the “juicy” bits!

- Is it memorable?
- Can you find detailed information about it online, or is it internal knowledge?
- After the workshop, did you walk away learning something new?
- Will your donors find that information informative, educational or impressive?
- Will your donors be proud of it and want to talk about it with their friends and family?

Enhancing the experience

What enhancements can you apply to your communications outside of direct mail?

- 121 phone calls
- Videos (first person/hand-held, lo-fi not high production)
- Plain/non-designed emails from unexpected voices from the organisation (or donors, or staff)
- What are some memorable ways to thank them? Can you pre-record a personal audio message for them?
- Can you invite them to F2F event or webinar? (Bring them closer to the organisation)

In summary

Curiosity & Vulnerability

Create alignment on intentions by asking questions across the organisation about the types of experiences, knowledge and impact you want mid-value donors to have. To discover these valuable insights, listen with curiosity and lean into vulnerability. Try it out and you'll be surprised what shared perspectives you uncover to inform your giving program. There are no 'silly' questions.

Spotlight the juicy bits

Incorporate rich storytelling and spotlighting! Find those 'juicy bits.' Charities are great at describing what they do, but you need to dig deeper to reveal what makes your organisation memorable and use that to connect with your audience. Tailoring your narrative to spotlight the 'juicy' details and impact your donors don't already know is what inspires them to give. Tell them something they don't know.

Tailor your proposition

Tailor the proposition to mid-value donors' needs and wants. Once you've perfected your narrative, tailor your proposition to meet your donors needs, values and wants. The CX work coupled with the workshop = knowledge you can use to craft persuading communications across multiple channels.

How we delivered on the strategic intentions (tax 2021)

Make them feel special

Host exclusive events that introduce them to program leaders and beneficiaries. Integrate this into a multichannel journey along with a strong CTA.



Go inside the story.

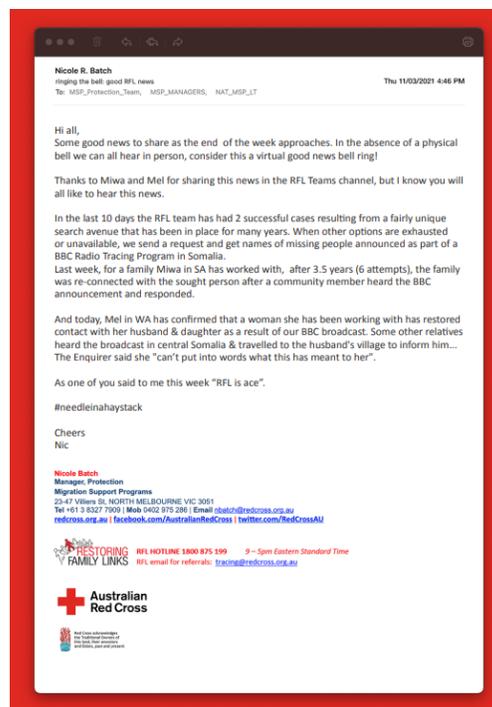
Please join us on Wednesday 2 June for an exclusive webinar about our work to reconnect families.

Meet Bihozagara (22) who was separated from his family by conflict in the Democratic Republic of the Congo. Bihozagara and our Field Officer Mandy Kamel will talk about the successful search to find his family. Then Program Manager Nicole Batch will explore in detail our work reconnecting families across the world.

This is a wonderful opportunity to see the true impact of your support for our teams, and for the people we help.

Wednesday 2 June
10:30 – 11:15am (AEST)
redcross.org.au/xxxxx

Register your spot now.



Show them the impact
Share the juicy wins – even the internal emails from manager to team with success stories.

Bring them closer to your team
Introduce mid-value donors to the specialist team members they're investing in.



Q & A



with Restoring Family Links
Field Officer Mandy Kamel

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How we delivered these strategic intentions (festive 2021)

Don't sell to me
 Special report from a program leader gives MV donors more stories and the nitty-gritty of the programs they fund.



Special report for Lorna

Prepared by: Javi Swenson
 Program Development Lead, Safety Net
 Australian Red Cross

Topic: When there's nowhere to turn

Providing a safety net for people seeking asylum and migrants experiencing vulnerability in Australia.

Everyone deserves a safe place to call home and a community that cares.



To see this photo and to see all over the world Red Cross and Red Crescent is there, every step of the way, for people made vulnerable by migration – wherever the nation.
 This photo was taken in Bangladesh by Shereef Moushraf for the International Committee of Red Cross.

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Be transparent
 Supply a budget breakdown on the programs they are investing in.

'The impact you can have'
 helps the donor understand their role. To see how they can make a difference.

The impact you can have

Each year in Australia, thanks to donations from the public, our **Project Safety Net** helps over 2,000 people who are facing particularly difficult circumstances. We help regardless of visa status or how someone arrived here. Support is based solely on humanitarian needs, giving priority to the most urgent cases.

This is the process we follow with each person who comes to us for support:

STEP 1: Check eligibility criteria

- ✓ Has urgent needs such as food, housing, health, medicine
- ✓ Is in financial hardship
- ✓ Is not an Australian citizen or permanent resident
- ✓ Has extra needs such as caring for children, coping with domestic violence or facing persecution in their home country

STEP 2: Complete application, verification and screening for vulnerabilities

STEP 3: Our caseworker undertakes an individual assessment and arranges referrals to additional support services as required

STEP 4: A team leader reviews and approve successful applications

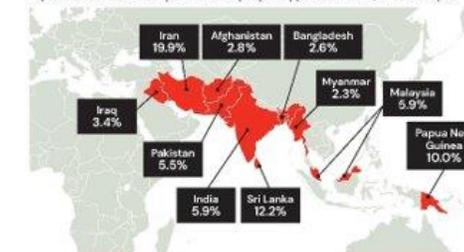
Immediate financial support provided

Ongoing casework support for people with complex needs and vulnerabilities

Provide or refer to employment support for people who are able to work. Employment can lead to financial independence and is often the only way out of hardship for many.

This is a snapshot of where people we've recently helped come from, seeking a safer life for themselves and their families.

Top 10 countries of birth - per cent of all people supported in 2020/21 financial year



A new mid-value fundraising product catered to their needs

 Australian Red Cross

You have what it takes to be one of the Red Cross 50

You expect the unexpected. You act rather than react. You see solutions where others see problems. You look towards the future, taking learnings from the past.

And, you're here to act for humanity, no matter what lies ahead.

Speak to your donor's values. Let them see themselves in the story because they are that kind of person.

 Australian Red Cross

The future waits for no one



With your help, we will be ready



Acting for humanity, together

In the face of once-in-a-lifetime challenges, the Australian community has shown resilience, coming together in the most extreme circumstances.

And through it all, it has been the generosity of people like you that has ensured Australian Red Cross could be there to help communities cope with the impacts of climate change, disaster, conflict and hardship.

Will you join the Red Cross 50, a group of humanitarians united by a commitment to helping Red Cross respond to what comes next?

Looking at the years to come, and the challenges we might face together, now is the time for us to make a bold statement on the world we want to live in.

Sustained impact, sustained giving offers Red Cross the confidence that it can serve the community's needs for today and tomorrow, no matter what they might be.

You have a special role to play in shaping how we help – at home in Australia, in the Asia-Pacific region, and around the world. As part of the Red Cross 50, you can be on the cutting edge of this work.

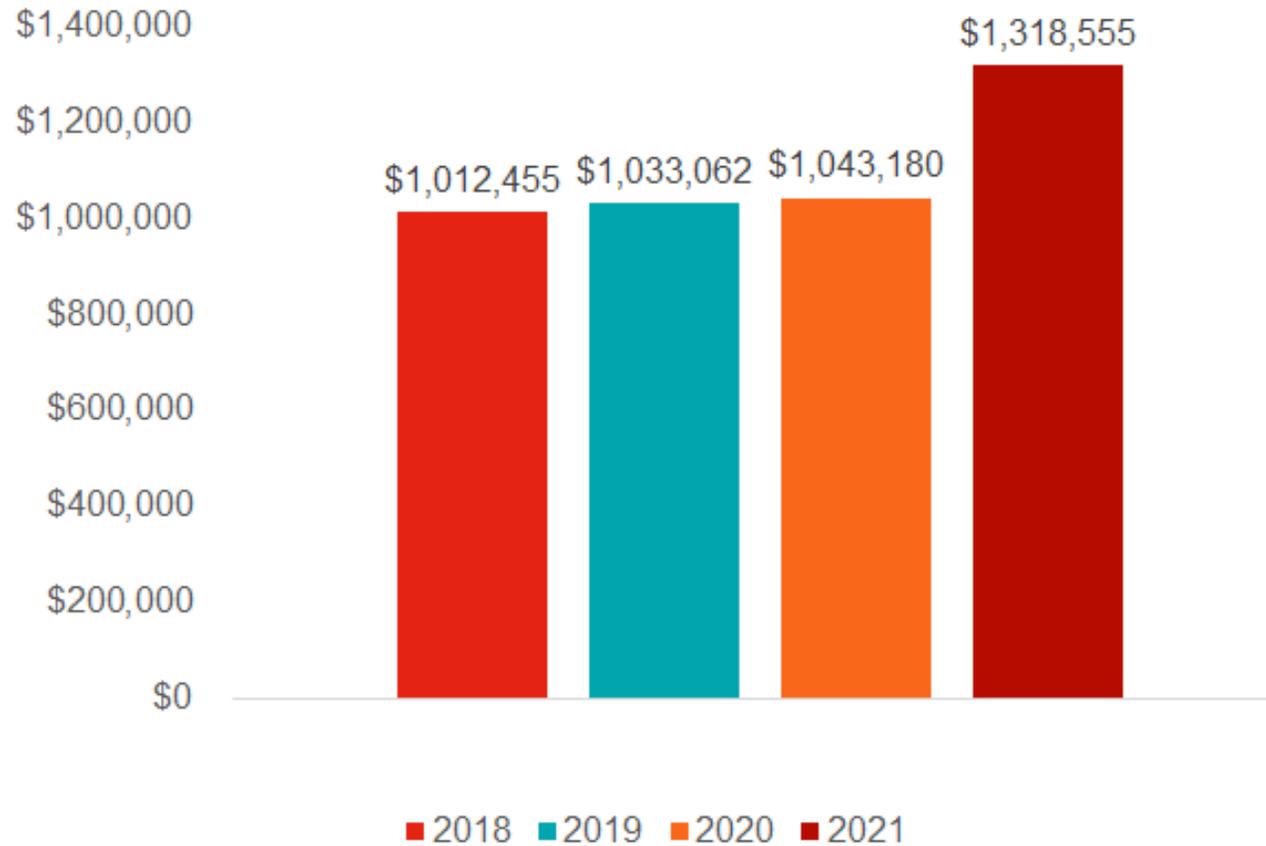
It's impossible to predict what the future holds. But what I do know, is that when people need support, Red Cross will be there to respond – because of you. Thank you.



Ryan Pittman
Chief Executive Officer
Australian Red Cross

"Sustained impact, sustained giving, offers Red Cross the confidence that it can serve the community's needs for today and tomorrow, no matter what they might be."

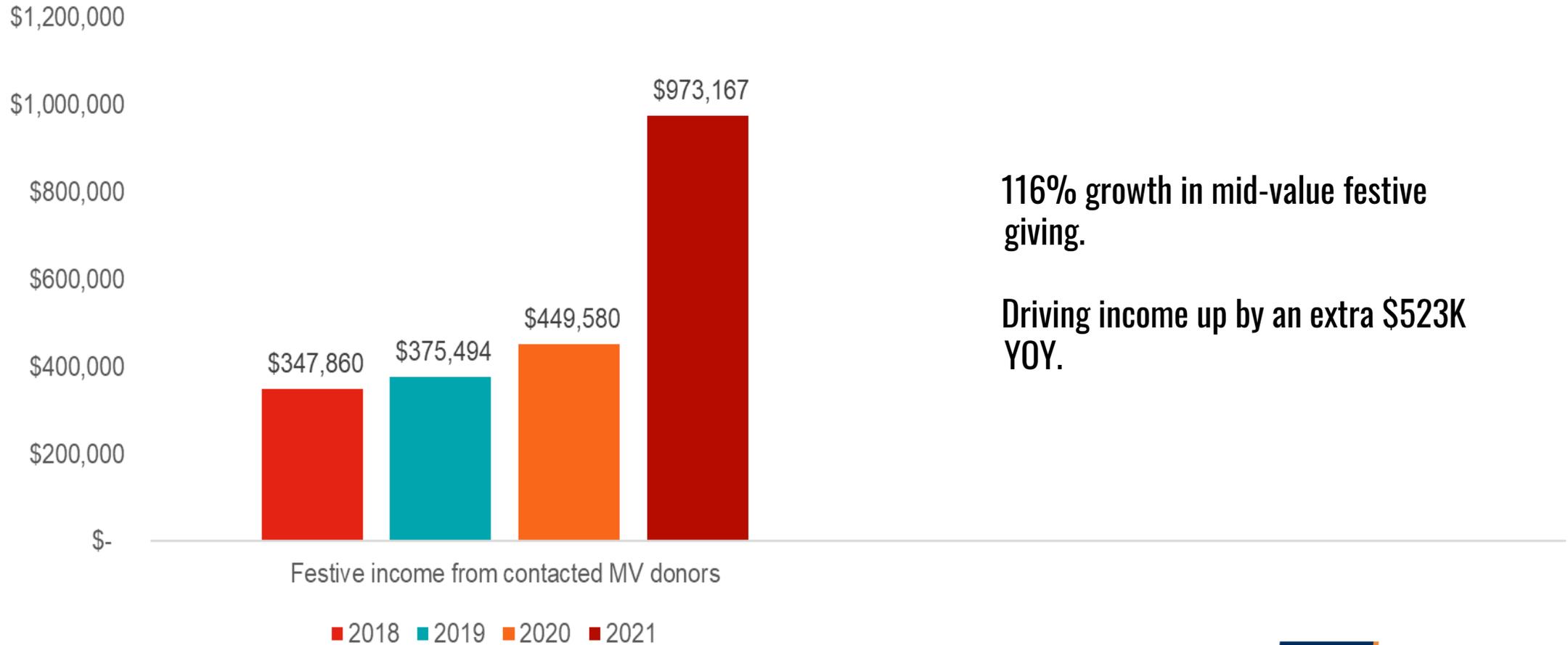
Preliminary income growth results so far



26% growth in mid-value tax giving.

Driving up revenue by \$275K

Preliminary income growth results so far



116% growth in mid-value festive giving.

Driving income up by an extra \$523K YOY.

Preliminary results so far (new fundraising product)

Total income received	\$250,000 in Year 1. \$600K pledged for the next three years.
Confirmed pledgers	41 (82% to target with 3 weeks left in market)
Intenders	6
Considerers	36
Hot Leads	84

Australian Red Cross 25136051
16 MAR 2022

Yes, I pledge to act for humanity and join the Red Cross 50

Please accept my 3-year pledge:

Donations \$2 or more are tax-deductible

\$5000 each year, for the next 3 years

My choice: _____

I pledge to join the Red Cross 50 and will make my gift at a later date. Please contact me to discuss further.

Please let us know your areas of interest:

Supporting people during disasters in Australia

Supporting people during disasters overseas

Tackling the humanitarian impacts of climate change

Empowering refugees and migrants

Strengthening communities and support services

My personal details: (Please update incorrect or missing information)

THANK YOU

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