



FIA Conference 2023

Together, unlimited.



FIA

CONFERENCE

Making moves count: Journeys for stewarding your gifts in Wills supporter pipeline

GIFTS IN WILLS

Karen Armstrong

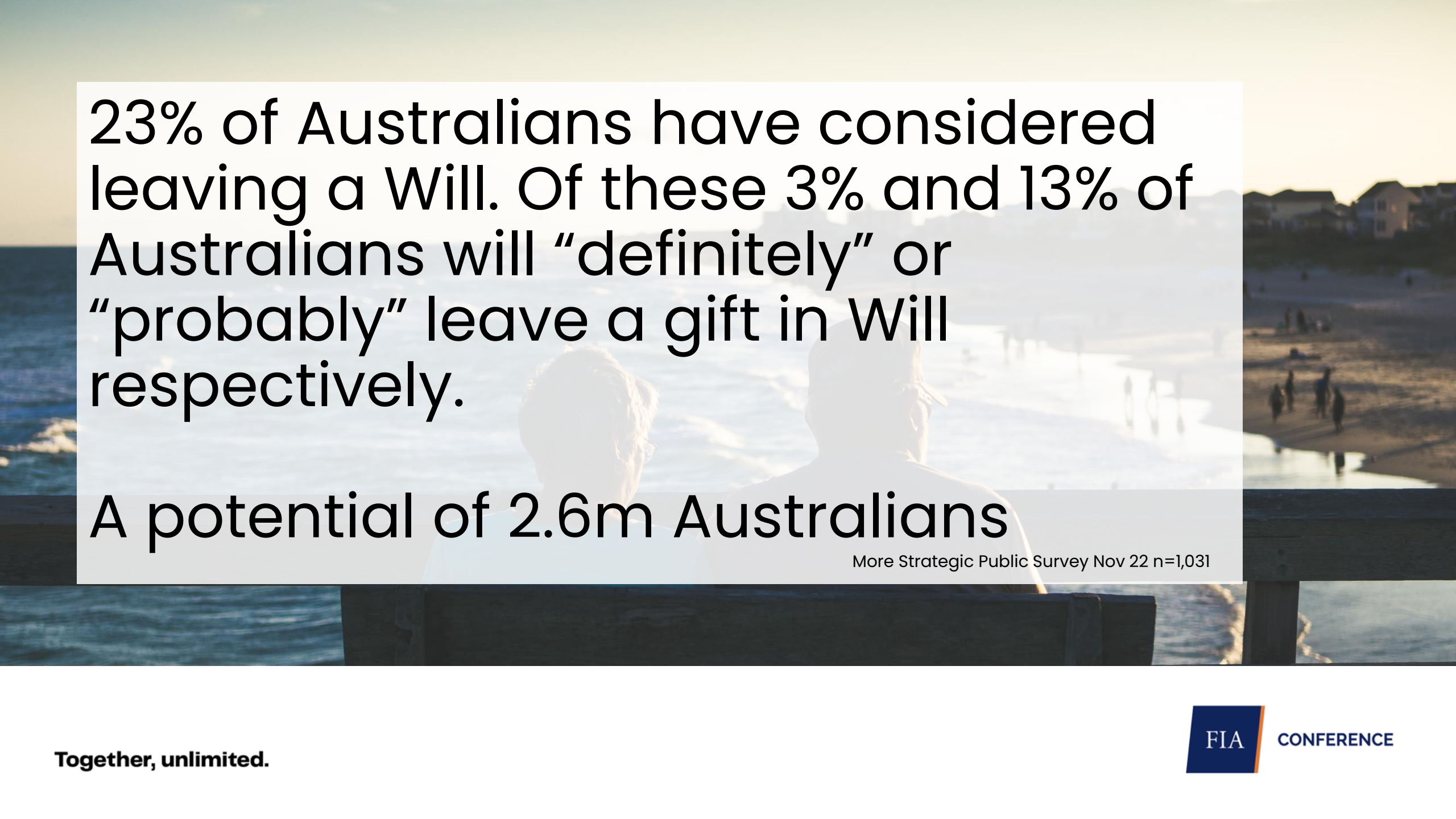
Lisa Matthews

Renee McLoughlin

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TRACK SPONSOR

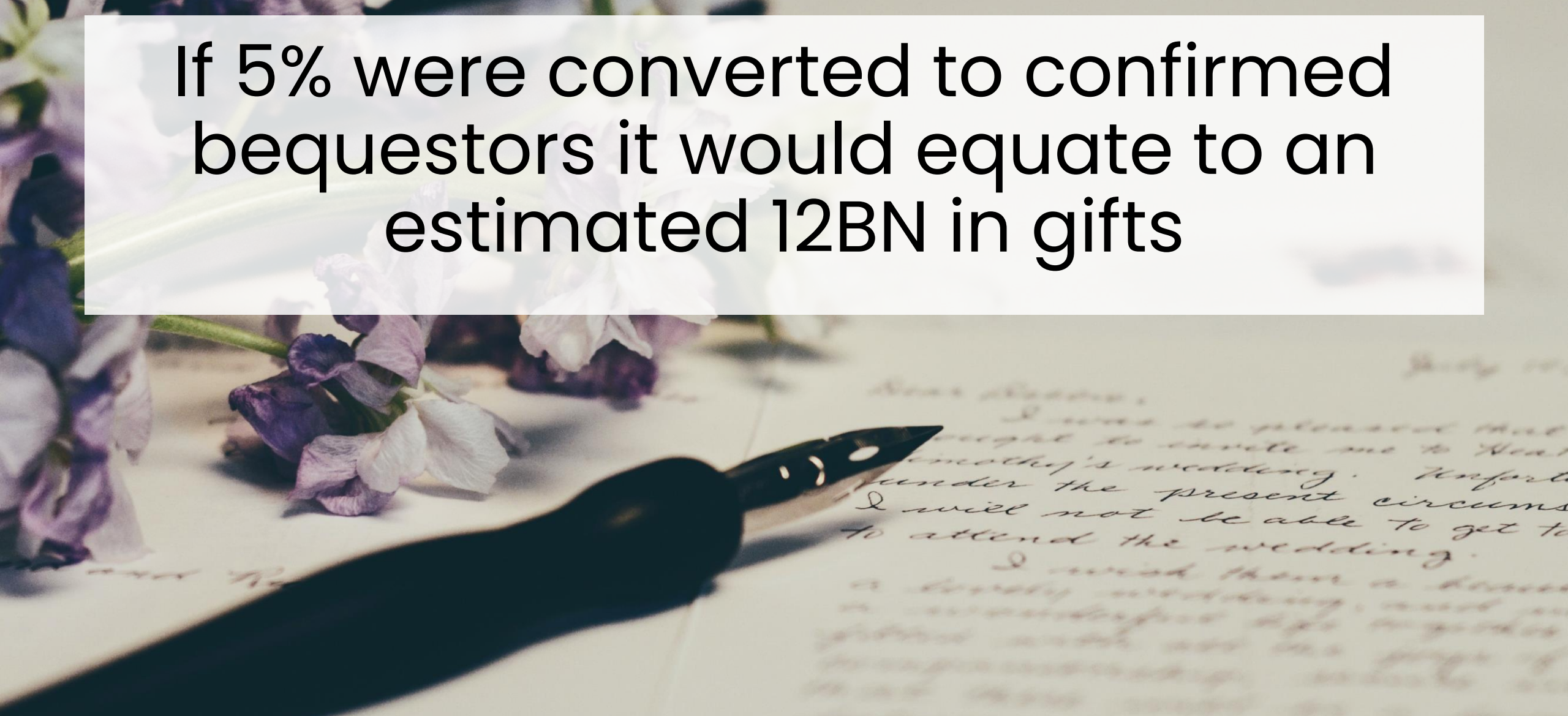




23% of Australians have considered leaving a Will. Of these 3% and 13% of Australians will “definitely” or “probably” leave a gift in Will respectively.

A potential of 2.6m Australians

More Strategic Public Survey Nov 22 n=1,031

A close-up photograph of a fountain pen with a black barrel and a silver-colored nib, resting on a piece of aged, cream-colored paper. The paper has faint, handwritten text in cursive. To the left of the pen, there are several small, delicate purple flowers with white centers, some in bloom and some as buds. The background is softly blurred, showing more of the flowers and the paper.


If 5% were converted to confirmed
bequestors it would equate to an
estimated 12BN in gifts



Charities are on average
stewarding 1k confirmed and over
2k intenders/considerers.

14% growth in pipeline size over
last 5 years, driven by 'More
Information' category.

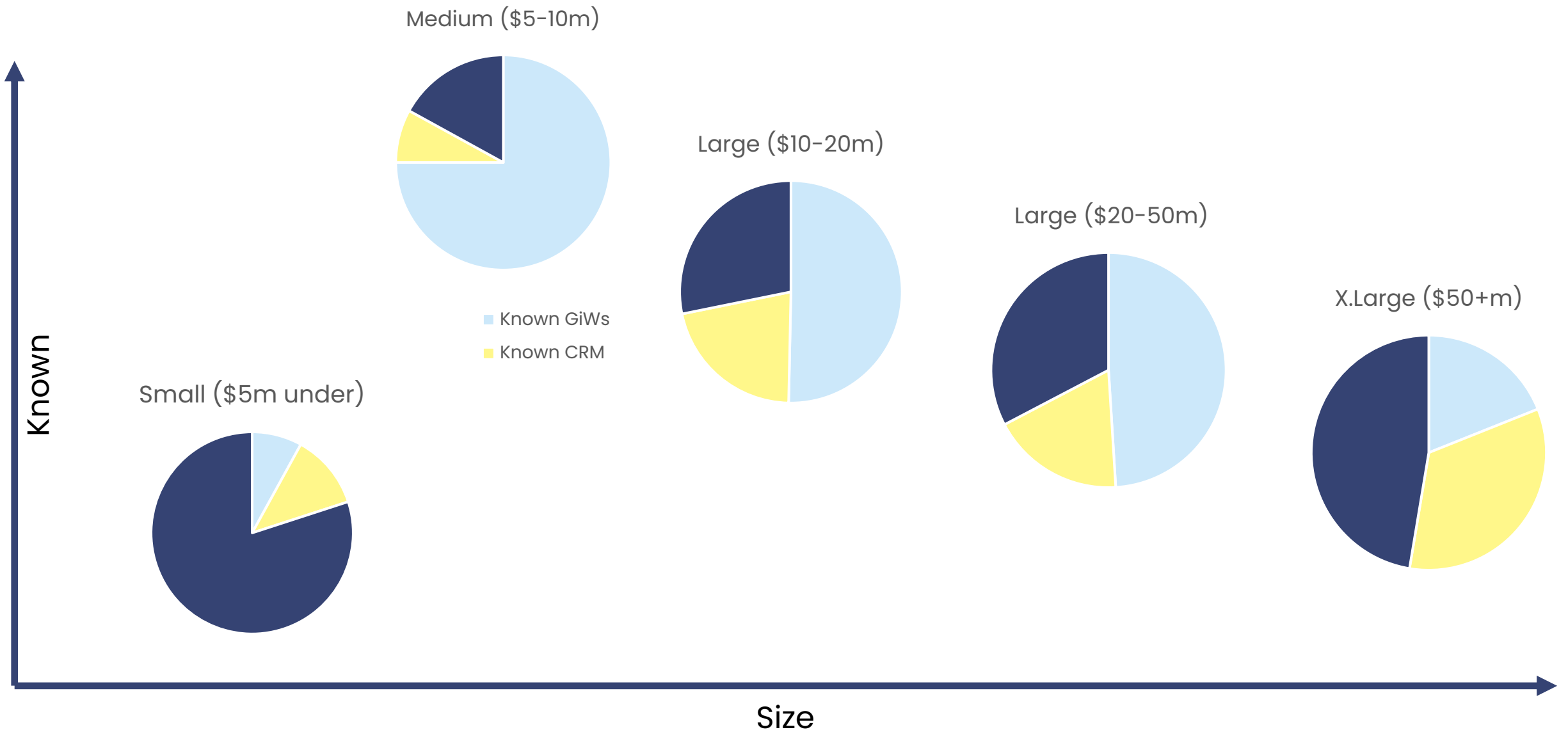
Include a Charity benchmark 2022



Let's convert the
average pipeline
considerers: 3%
intenders: 7%.

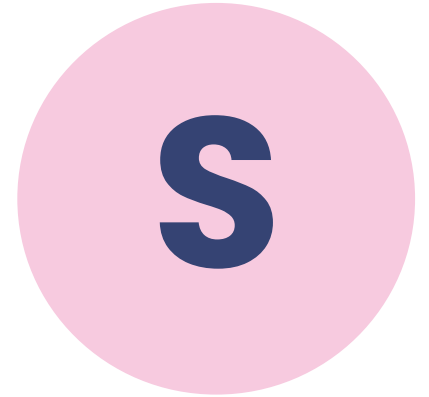
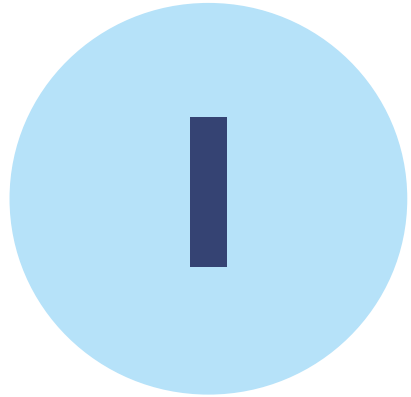
\$7.5m

Include a Charity benchmark 2022



Include a Charity benchmark 2022

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INSIGHT

DESIGN

ENGAGE

ACTION

SIGNALS

Together, unlimited.

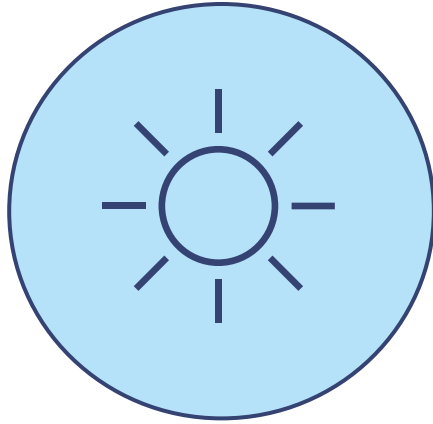


Demographics

Our considerers are:

- Single
- No children
- University degree
- Permanent employee
- Live in the city

More Strategic Public Survey Nov 22 n=1,031



Attitudes

More optimistic about the economy, their financial situation & reflected in their generosity:

- Strongly agree that they are better off than they expected
- Don't feel they have to think much about what they spend
- Strongly agree that they are actively trying to save money
- Likely to give a little more to charity this year and a few more charities
- More likely to talk to about their charitable giving to parents, siblings and friends (Spouse/Partner has equal distribution for all)
- More likely to say their trust in charity has increased a little



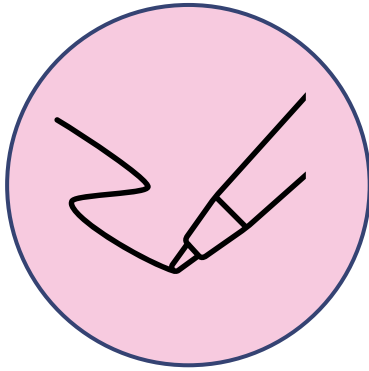
Engagement

Higher engagement in past 3 months:

- A phone conversation with a charity representative
- Attended a charity event
- Completing charity survey
- Received info about GiWs
- Purchased charity merchandise
- Read a newsletter / annual report

Higher digital engagement in past 3 months:

- Visited charity website
- Seen charity advert on social media
- Clicked a charity advert
- Seen & Signed online petition
- Raised funds using an online fundraising page (for example a fun run)
- Watched a charity video (multiple times)
- Liked a charity post and shared a charity post

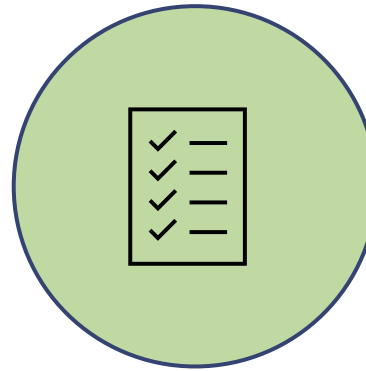


Confirmed

Average LTV: \$7.7k
Median LTV: \$2k
Last 12mths \$1,183
35% cash / 23% RG
74yrs
NPS:74



61% emailable
Open: 95% / 49%
Clicked: 70% / 8%

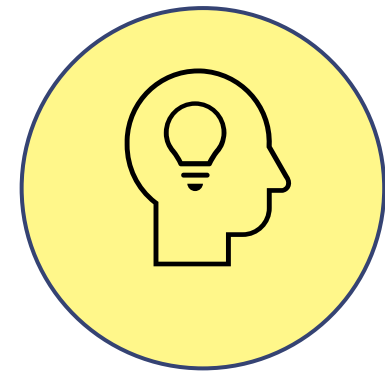


Intending

Average LTV: \$5.0k
Median LTV: \$1.9k
Last 12mths \$750
30% cash / 32% RG
71yrs
NPS:75



72% emailable
Open: 88% / 37%
Clicked: 62% / 5%



Considering

Average LTV: \$2.2k
Median LTV: \$670
Last 12mths \$425
35% cash / 20% RG
69yrs
NPS:64

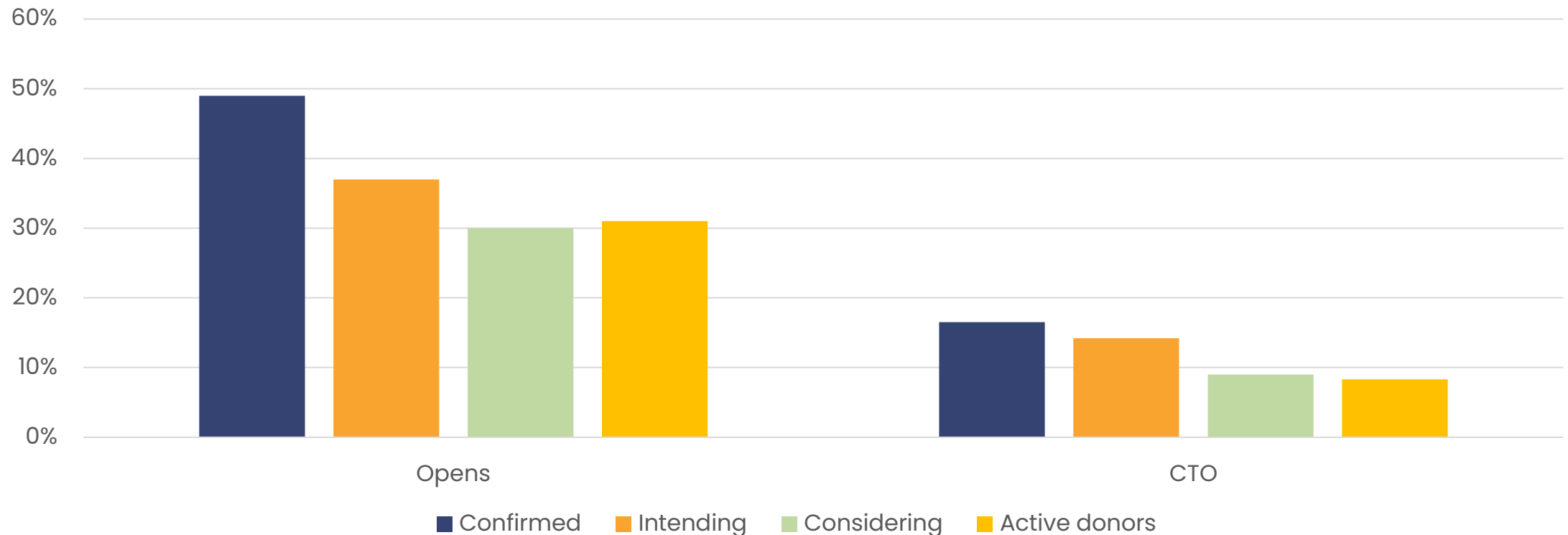


60% emailable
Open: 86% / 30%
Clicked: 47% / 2.7%

More Strategic Supporter View 2022

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More Strategic Benchmarks by engagement



Together, unlimited.

Cancer Council Victoria

GIFTS IN WILLS
Renee McLoughlin

Together, unlimited.

TRACK SPONSOR





MARY maybe!

"We don't want this horrible disease for our future generations, but nothing will happen without more research and that of course takes money."

DEMOGRAPHICS

- 69
- Married 35 years
- Postgraduate degree
- Retired accountant
- Empty nester with family close by and 2 x grandkids
- Portsea

NUDGES

Authority: She responds to seeing researchers and Todd as the CEO talking about the advancements made in research. **Mental**

Accounting: She has been consistently giving to Cancer Council Vic but if she allocates a gift in Will she's likely to change her Xmas and Tax gifts

Pre-commitment: She has expressed her interest in leaving a gift in Will and is open to communications to continue this discussion

OPPORTUNITY

To give Mary the support and information required to include a gift in Will along a timeline that matches his expectation and engagement with Cancer Council Vic

PAIN POINTS

Their appeal engagement doesn't match the 'understood' experience

CHARITY ENGAGEMENT

Has given more than \$5,000 during her lifetime and gave a \$250 gift at tax and Xmas this year. She is thinking about leaving a gift in her Will and reducing the frequency of gifts.

CAUSE ENGAGEMENT

Father died with prostate cancer. He had a good life, but even so, she felt that his father really suffered in the latter part of his life. She's worried about this ever happening to another family member

EXPERIENCE

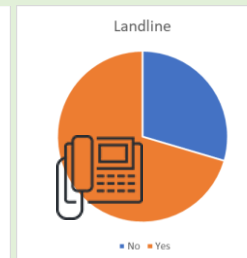
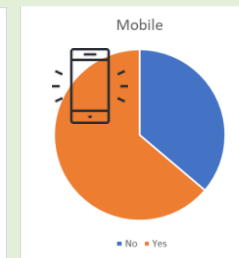
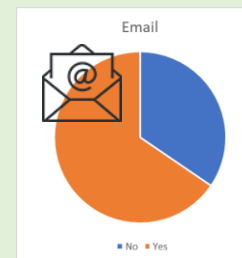
"I love the work that Cancer Council does, and I will keep supporting them. The more invested in research the better"

She knows she is just one of many donors and is happy to just do her part. Is a promoter of the organisation and holds CCV in high regard.

MEMORABLE EXPERIENCE

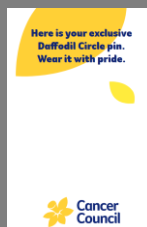
Personal conversation where they feel understood

COMMUNICATIONS



Welcome to the Daffodil Circle.

cancervic.org.au



Certificate of Appreciation

Thank you for the care and compassion you have shown to future generations of Victorians

Daffodil Circle Member

Tash Hagan AM
CEO, Cancer Council Victoria
cancervic.org.au



Record of my wishes

PRIVATE AND CONFIDENTIAL

Cancer Council Victoria would like to be able to recognise your generosity and honour your commitment to cancer research. We would like to be able to say that you wish them to do this - your wishes are yours. Please tell us what you wish them to do.

Please note: The information you provide below is advisory and confidential and is not legally binding.

Name: First Name: _____ Surname: _____

It is my wish to ensure Cancer Council Victoria can continue to work towards a cancer free future. It is for this reason that I am pleased to see you have chosen to make a gift to Cancer Council Victoria in my Will and would like to be treated in the following manner:

Daffodil Circle membership

By making a gift to Cancer Council Victoria in your Will, you are automatically granted membership of our Daffodil Circle. Members of the Daffodil Circle have the opportunity to meet the members of the research team, receive updates about research findings and learn about what your future gift will achieve.

All of these are your wishes, and we would like you to choose your own level of involvement with the Daffodil Circle. Please complete the information below to help inform us about what you wish to do.

As a member of the Daffodil Circle:

I would like to be invited to social functions, where I can personally meet Cancer Council Victoria staff and researchers.

☐ Yes ☐ No

I would like to be invited to a virtual, or in-person, Coffee and Connection events, where I will meet people in my field and where the same issues and their updates from the organisation.

☐ Yes ☐ No

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Dear **Contributors**,

It is my wish to ensure Cancer Council Victoria can continue to work towards a cancer free future. It is for this reason that I am pleased to see you have chosen to make a gift to Cancer Council Victoria in my Will and would like to be treated in the following manner:

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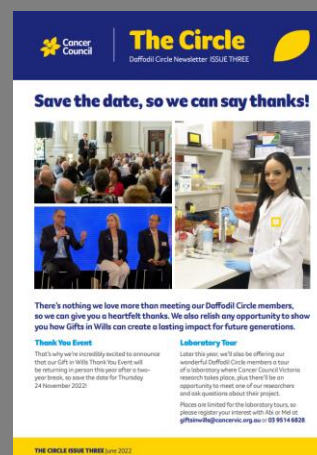
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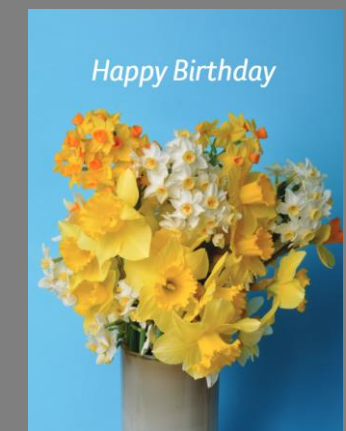
☐ Yes ☐ No

Examples - Retention Journey



Newsletters & Impact Reports

Hand-written cards



Thank You Event 2022

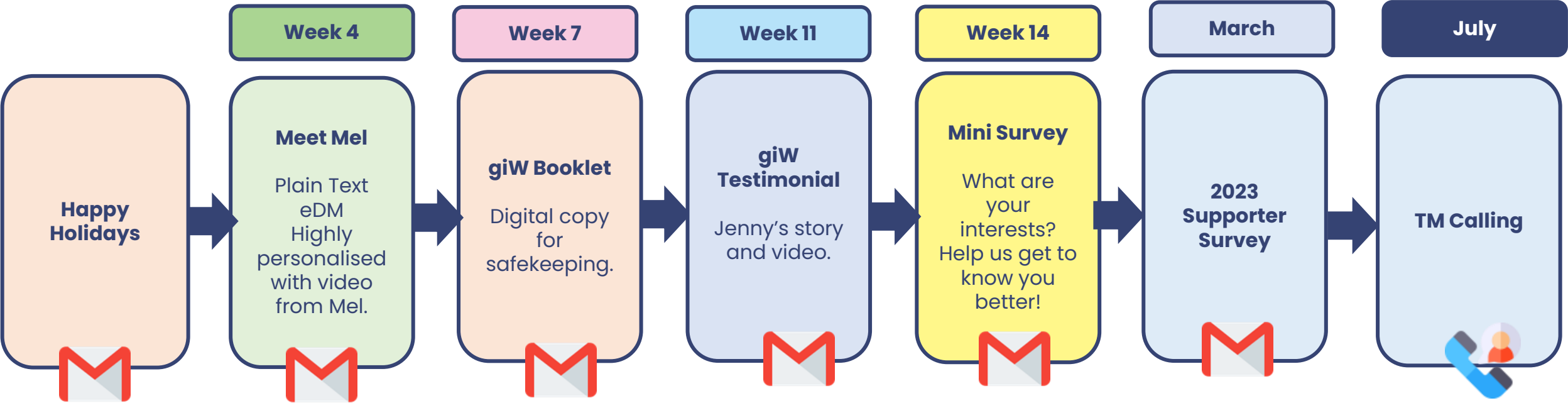


Personalised Contact as per preference of Donor

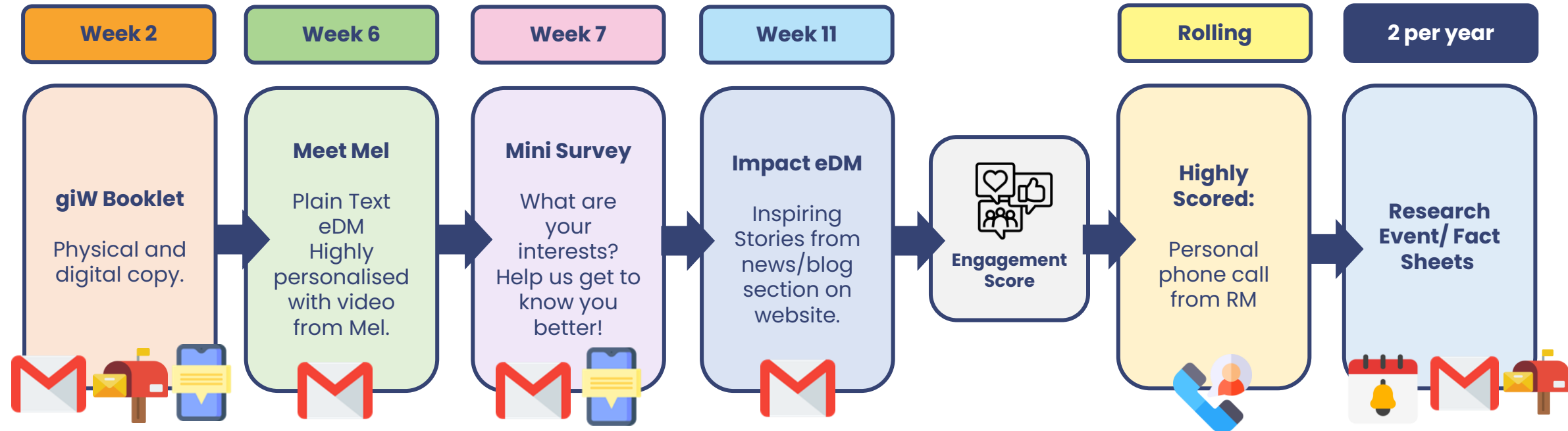
- Phone calls
- Visits
- Email
- SMS
- Invitations to Lab Tours
- Nil




Lead Qualifier: Cold giW Considering and Intending Supporters



Lead Qualifier: New giW Considering and Intending Supporters



Example Emails



Dear friend,

Thank you again for considering leaving a gift in your own Will to Cancer Council Victoria. Gifts in Wills is a wonderful way of continuing your support long into the future and we are very grateful to have been considered.

One of my favourite parts of my role at Cancer Council Victoria is getting to know our supporters better. So, I wanted to take the time to reach out and introduce myself to you!

My name is Melanie Coles but you can call me Mel. I work in the gifts in Wills team here at Cancer Council Victoria, and have been here for just under 6 years now.

I LOVE working in gifts in Wills and with our amazing gift in Wills supporters. It's such an incredibly inspiring and exciting place to work and I love seeing the difference that a gift in a Will can make and the change it helps contribute to.

To help you get to know me a little better, I've recorded a quick video to introduce myself and to share the vision I have for a cancer free future: <https://www.youtube.com/watch?v=pG0yFCai3I4>


As one of our generous supporters, I know that you share this vision and are just as passionate about eliminating and treating cancers, and supporting those who live with cancer. So on behalf of all of us, I want to say thank you for your support. Because every dollar you leave in your Will brings us closer to a cancer free future.

Until next time,

Melanie Coles
Gift in Will Lead

Cancer Council Victoria
615 St Kilda Road,
Melbourne VIC 3004

If you or someone you know is affected by cancer, please call our experienced and compassionate cancer nurses on **13 11 20** for information or support.



Dear friend,

Did you know that over 50% of all research and support offered to people affected by cancer in Victoria in 2021 was made possible by compassionate Victorians who included a gift in their Will to Cancer Council Victoria?

Imagine what could happen if every Victorian left even a small gift in their Will to support cancer research, prevention, and support.


You previously received a copy of our Gift in Wills Guide, which details everything you need to know about leaving a gift to Cancer Council Victoria in your Will. I've attached a copy to this email as well in case you need it.

[Download your Gift in Will guide here](#)

Thank you again for taking the time to consider the powerful impact you could have on the future of cancer, through a gift in your Will.

We are here to help if you have any questions or need further information or assistance. If there is anything you'd like to discuss you can contact our team directly on 03 9514 6828 or email giftsinwills@cancervic.org.au

Best wishes,




Melanie Coles
Gifts in Wills Lead
Cancer Council Victoria
T: 03 9514 6159
E: Melanie.Coles@cancervic.org.au

P.S. If you or someone you know is affected by cancer, please call our experienced and compassionate cancer nurses on **13 11 20** for information or support.

If you have a general enquiry, please email supportercare@cancervic.org.au or call 1300 65 65 65.

You've received this email because of your kind support of Cancer Council Victoria.



Together we can shape a brighter future.


Imagine that.

Dear Friend,

Did you know that one in two Australians will be given a cancer diagnosis in their lifetime? That means every year, many Victorians, just like you and I, are having to deal with either their own or a loved one's cancer diagnosis. For some, cancer affects their lives more than once.

This was the case for Jenny Carter, a passionate, determined woman who tragically lost her husband, Enrol, to Hodgkin lymphoma in the 1990, just one week after his 50th birthday. Then in 2016, she lost her second partner, Dick, to prostate cancer.

Losing two loved ones to cancer, Jenny made an important decision to help others fighting against the disease. **Watch the video below to hear Jenny's story.**




Leaving a gift in her Will is an incredibly compassionate way for Jenny to make a difference in the lives of others affected by cancer. In 2021, 54% of the cancer support services offered by Cancer Council Victoria and 51% of the research that took place was thanks to gifts left in Wills.

You might be surprised by the varied ways a gift like this can positively impact those affected by cancer. Gifts in Wills help fund:

- **Life-saving research into the prevention, treatment, and cure for cancer.**
- **Our 13 11 20 Cancer Information and Support line, manned by oncology nurses to support people affected by cancer, and their families, as they face the day-to-day challenges of a cancer diagnosis.**
- **Education and support programs like Sundmart, LiveLighter and QUIT, that help people reduce their risk of cancer.**

By including a charitable gift in her Will, Jenny is giving thousands of Australians hope for a cancer-free future. And you can too. If you have any questions or there is anything you'd like to discuss you can contact our team directly on (03) 9514 6828 or email giftsinwills@cancervic.org.au


Kind regards,



Melanie Coles
Gifts in Wills Lead
Cancer Council Victoria
T: 03 9514 6159
E: Melanie.Coles@cancervic.org.au

If you or someone you know is affected by cancer, please call our experienced and compassionate cancer nurses on **13 11 20** for information or support.

You've received this email because of your kind support of Cancer Council Victoria.




Dear friend,


As we head into another year, we're looking back on the programs, resources, and research that have made a real difference in the lives of Victorians affected by cancer.

For over 65 years, Cancer Council Victoria has played an important role in reducing the devastating impact of cancer on all people and communities. Working hard on our mission to prevent cancer, empower people and save lives.


Here are just some of the inspiring stories that have been made possible by your generosity and commitment.




State-of-the-art chair to be a game-changer in radiation treatment
Researchers are designing and manufacturing a state-of-the-art radiotherapy chair to better target cancer cells and provide much-needed comfort for patients.



The support campaign proving you're not alone
With a database of more than 470 community support services, we can provide support, care and information to patients, their families and loved ones no matter where they live.



Advancing law to also cancer
Celebrating 10 years of operation of the McCabe Centre for Law & Cancer, the first of its kind in the world.




Ready for a Food Fight?
The awareness campaign helping parents understand the impact unhealthy food and drink has on our kids health.

Thanks to Victorians like you, we're making a real difference in the lives of people living with cancer. We hope these stories illustrate your powerful impact.

Together we can imagine a future without cancer.


Best wishes,



Melanie Coles
Gifts in Wills Lead
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T: 03 9514 6159
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If you or someone you know is affected by cancer, please call our experienced and compassionate cancer nurses on **13 11 20** for information or support.

You've received this email because of your kind support of Cancer Council Victoria.



Dear friend,

Imagine a future when cancer doesn't tear families apart. Support like yours brings us closer to our mission of preventing cancer, empowering people and saving lives. And for that we are very grateful.

I would love to hear about the areas of our work that interest you and get to know you a little more! I've put together a short survey below that will help us to understand what matters most to you.

1. Which types of cancer are most important to you?

<input type="radio"/> All cancers	<input type="radio"/> Gastrointestinal (e.g. ovarian)	<input type="radio"/> Pancreatic
<input type="radio"/> Blood (e.g. leukaemia)	<input type="radio"/> Liver	<input type="radio"/> Prostate
<input type="radio"/> Brain	<input type="radio"/> Lung	<input type="radio"/> Sarcoma
<input type="radio"/> Breast	<input type="radio"/> Lymphoma	<input type="radio"/> Skin
<input type="radio"/> Other		


[START SURVEY](#)

Alternatively, I'd love to have a chat with you if you have the time. Is there a time in the next few weeks that suits for me to give you a call? If you prefer email or text that's fine too, just let me know.

If there is anything you need you can always reach me directly on 03 9514 6828, or on this email.

Thank you again for your compassionate support and for sharing our vision for a cancer free future.

Take care and speak soon.



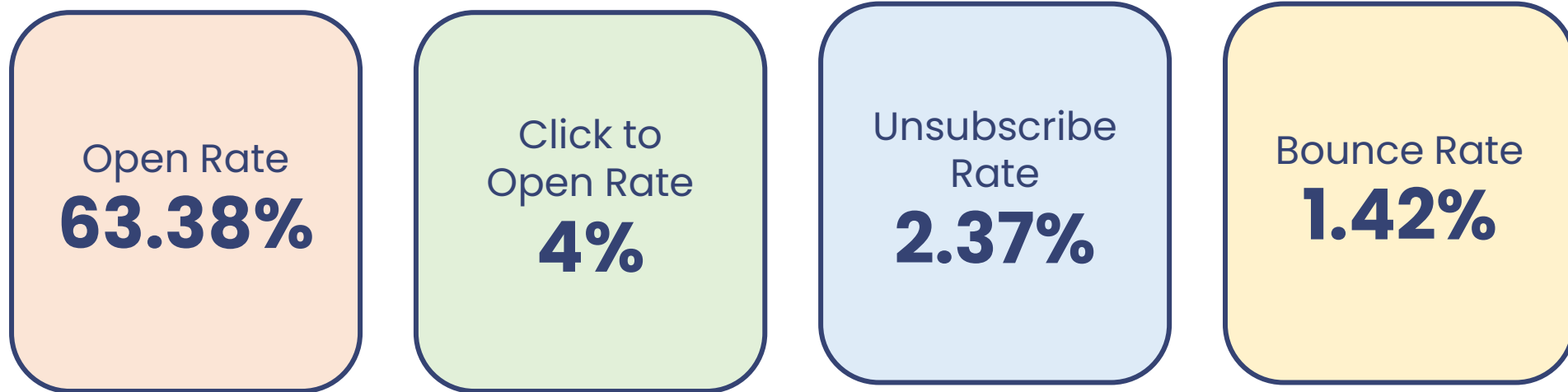
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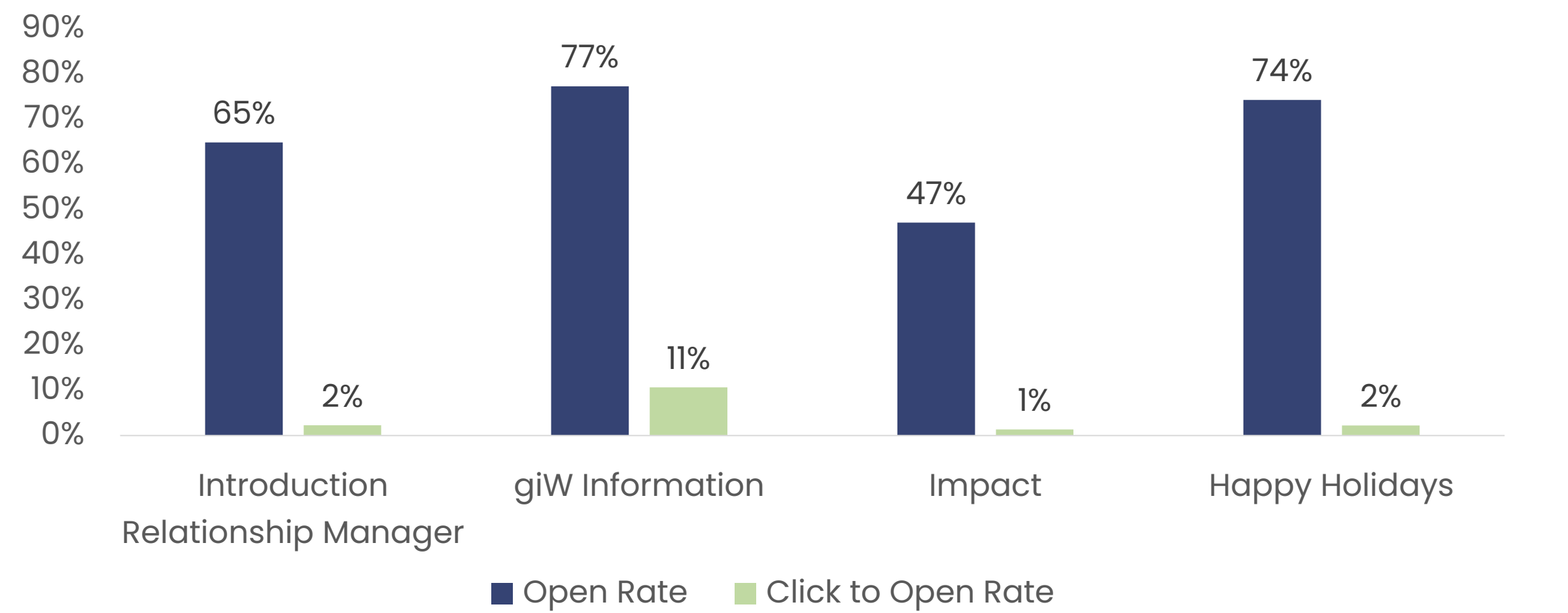
You've received this email because of your kind support of Cancer Council Victoria.

Together, unlimited.

Average Email Performance Across Journeys



Email Performance by Content Theme



Guide Dogs NSW/ACT

GIFTS IN WILLS

Lisa Matthews

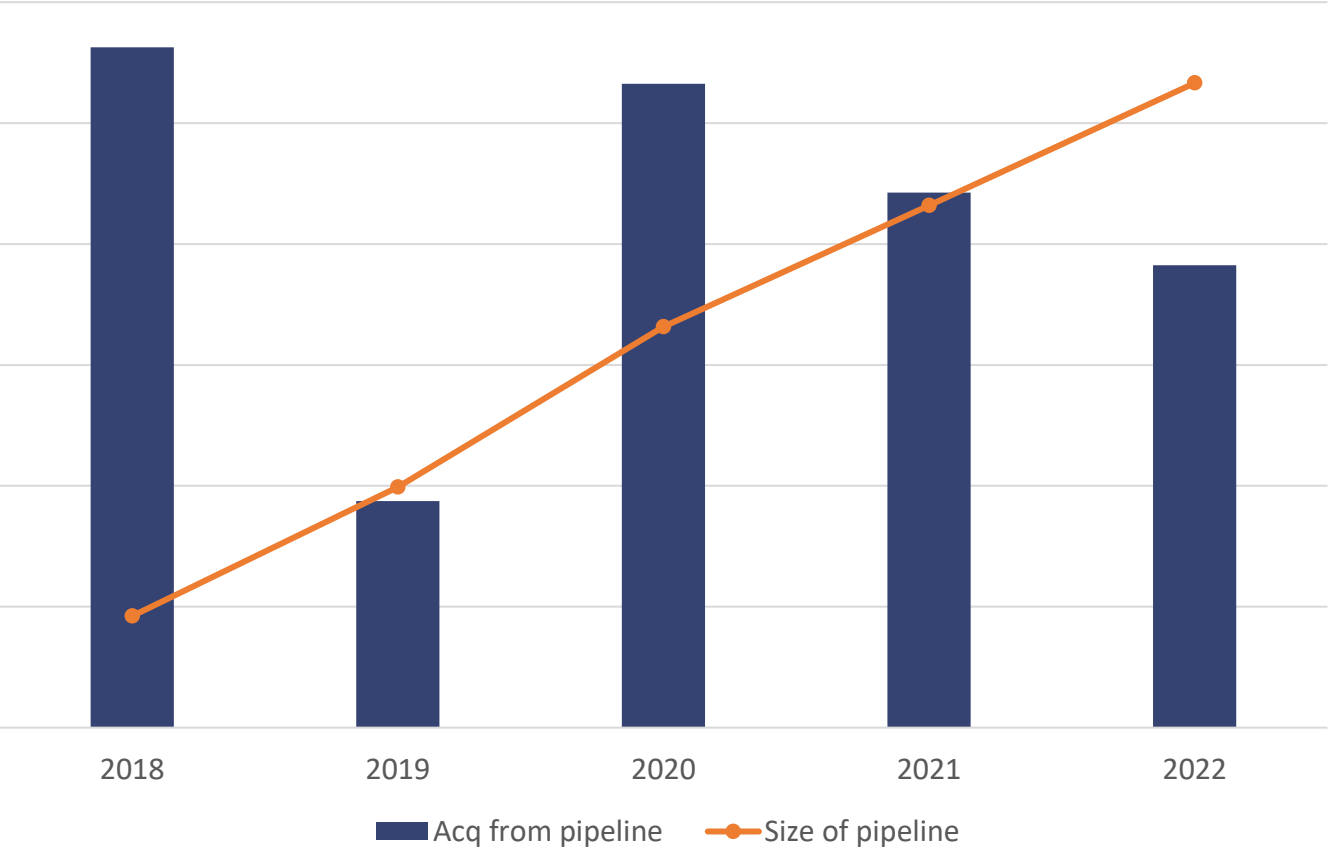
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TRACK SPONSOR

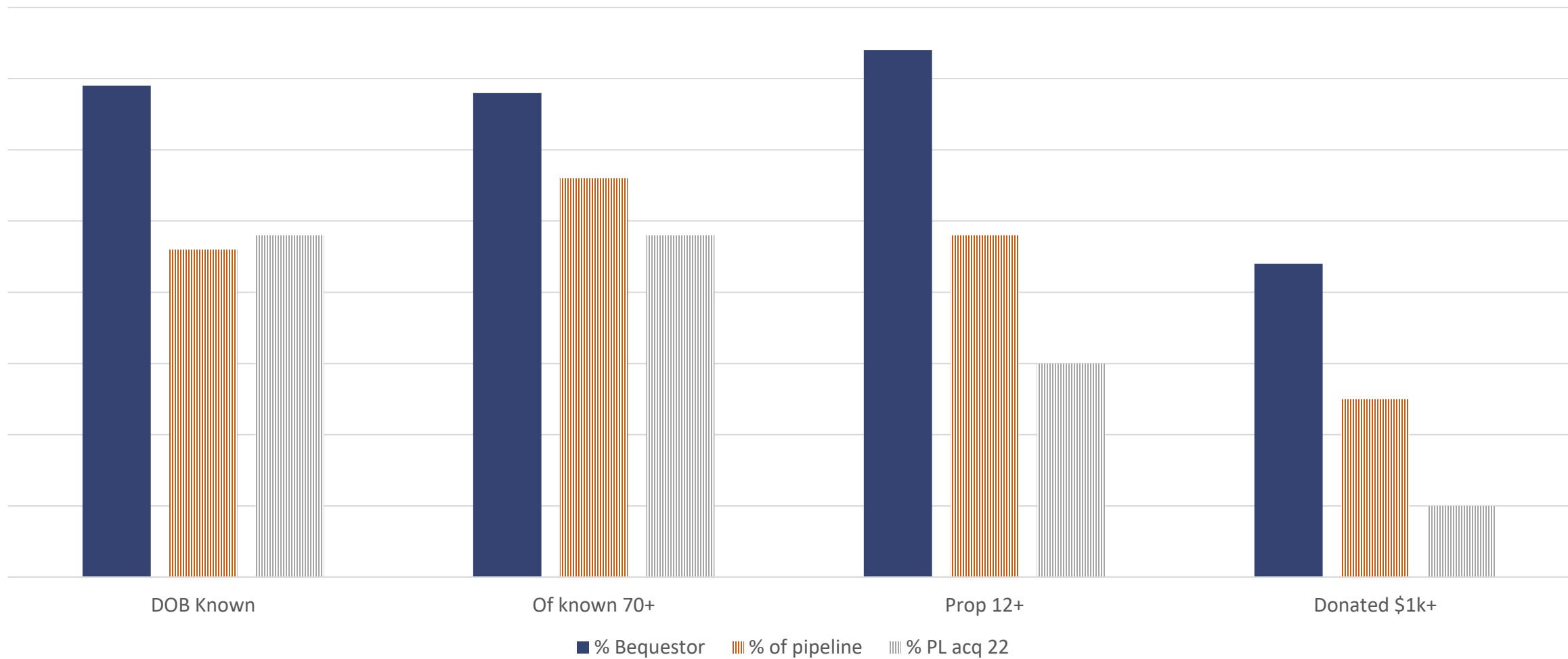


An ever-growing pipeline... but less productive?

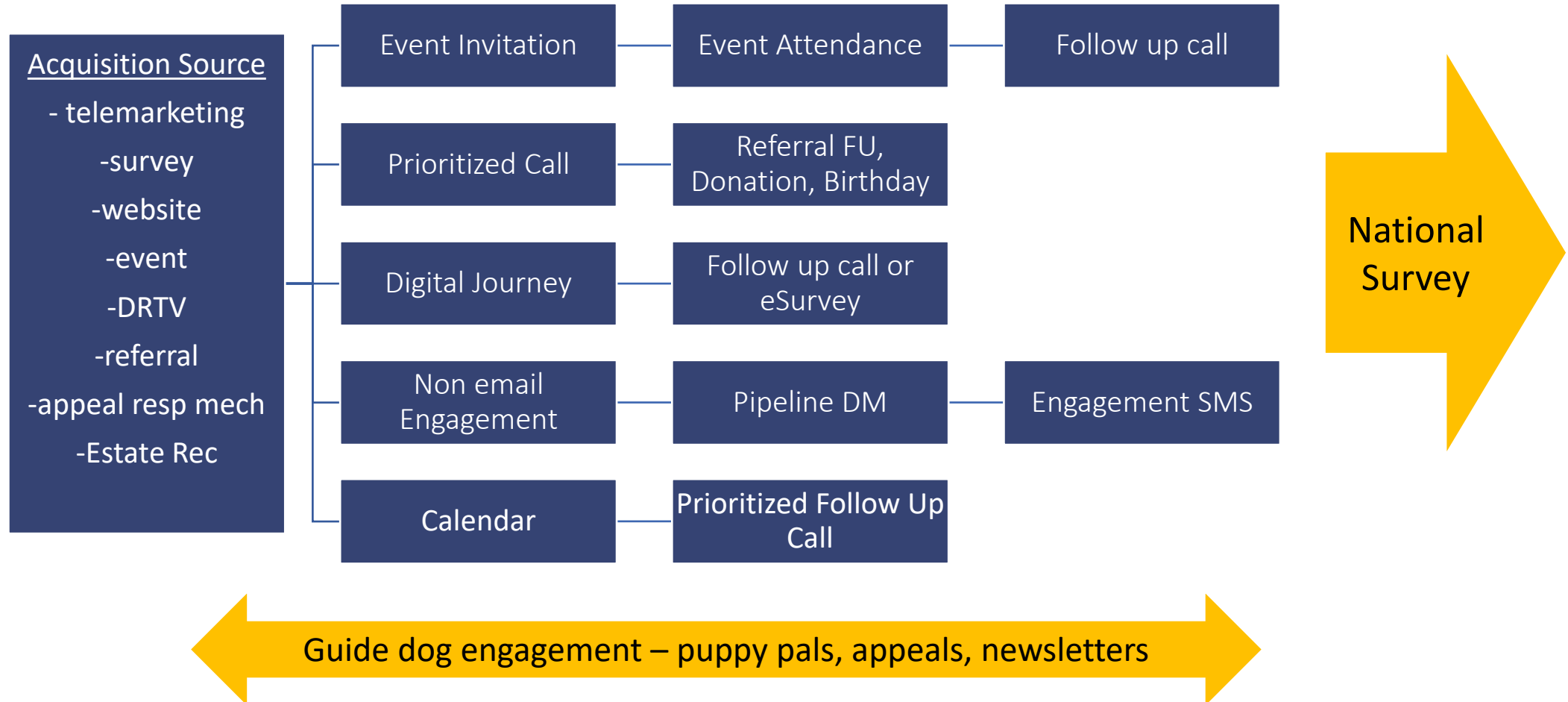
Size of pipeline vs BQ acquired from pipeline



Key donor dynamics are diluted in more recent pipeline acquisition

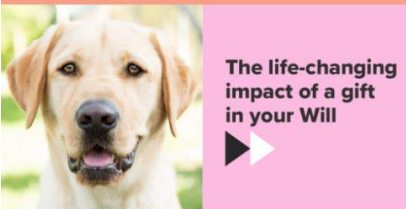


The source of acquisition drives engagement tactics



Remote Stewardship – The Guide Dogs Digital Journey

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The life-changing impact of a gift in your Will

Dear %FIRSTNAME%,

You may remember Tracey reaching out to thank you for considering leaving a gift in your Will to Guide Dogs Victoria. I'm here to share more stories and information about the impact your gift could have. I may even sneak in a few cute puppy videos!


I couldn't begin to imagine how much a Guide Dog could mean to a young adult like Ben until I saw him meet his new Guide Dog, Jontie. [Watch this very special moment by clicking here.](#)



Impact

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A very special message from Erin



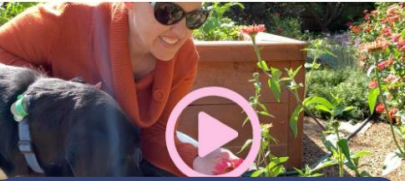
Dear %FIRSTNAME%,

I hope you're well.

I'd love to share with you this heart-warming story of a Guide Dogs Client, Erin and her Guide Dog Jet.

Erin was diagnosed with a rare eye condition as a teenager and by the time her 18th birthday came around, she had lost 90 percent of her vision. But thanks to a living gift in a Will from a very special woman called Dorothy – whom Erin calls her 'fairy godmother' – Erin was matched with her beautiful Guide Dog Jet.


Today I want to share this touching message from Erin to Karen, the daughter of her 'fairy godmother'. [Please watch it by clicking here.](#)



Testimonials


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How to leave a gift in your Will in three easy steps



Dear %FIRSTNAME%,

I wanted to share some more tips from Carol, where she discusses her three easy steps to leaving a charitable gift in your Will. [Click here to watch the video.](#)




I hope you found it helpful the way that Carol breaks it down into three simple steps:

Step one: Contact a Solicitor
Step two: Choose the type of gift

Educational

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A sneak peek from our recent virtual event

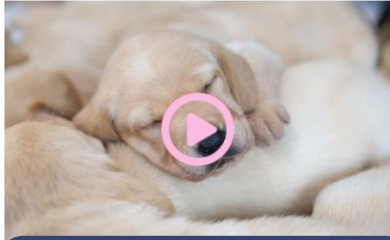


Dear %FIRSTNAME%,

I hope you enjoyed the behind-the-scenes look at our Guide Dog Graduation Day I shared with you a couple of weeks ago.

Today I wanted to share with you another very special moment from another event for our Otus Fellowship members, who have included a gift in their Will to Guide Dogs – featuring our Guide Dog Nurse Cheryl Taylor and some very special Labrador pups!


[Click here to meet these adorable pups.](#)



Events

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Deidre have a PAWsome Birthday!




Dear Deidre,

Happy birthday! I hope you are having a wonderful, relaxing day – you deserve it!

Your gifts help us transform our puppies from adorable bundles of fur into life-changing Guide Dogs; providing loyalty, companionship and newfound freedom for Australians who are blind or living with low vision.

[Click here to watch a happy birthday message from some of our gorgeous Labrador pups.](#)



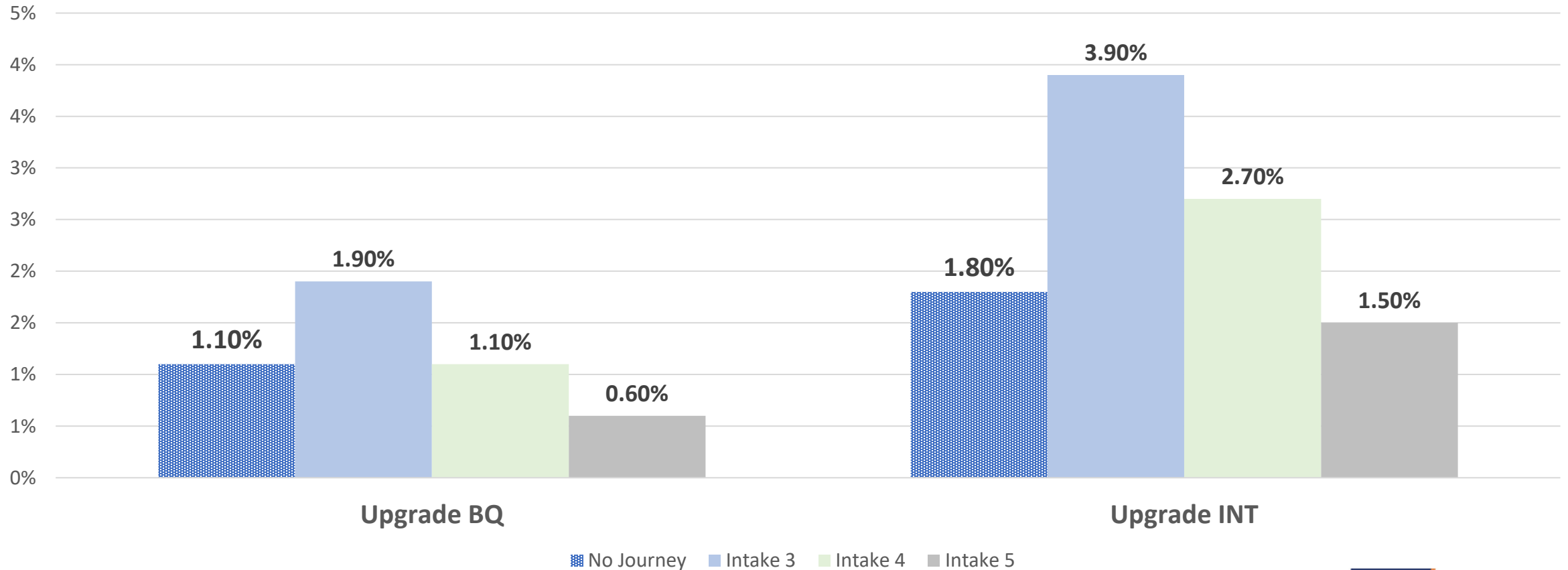
On going comms

Implementation Considerations and Challenges

Unsubscribes
Volume of emails
Donor hierarchy
Digital Capability

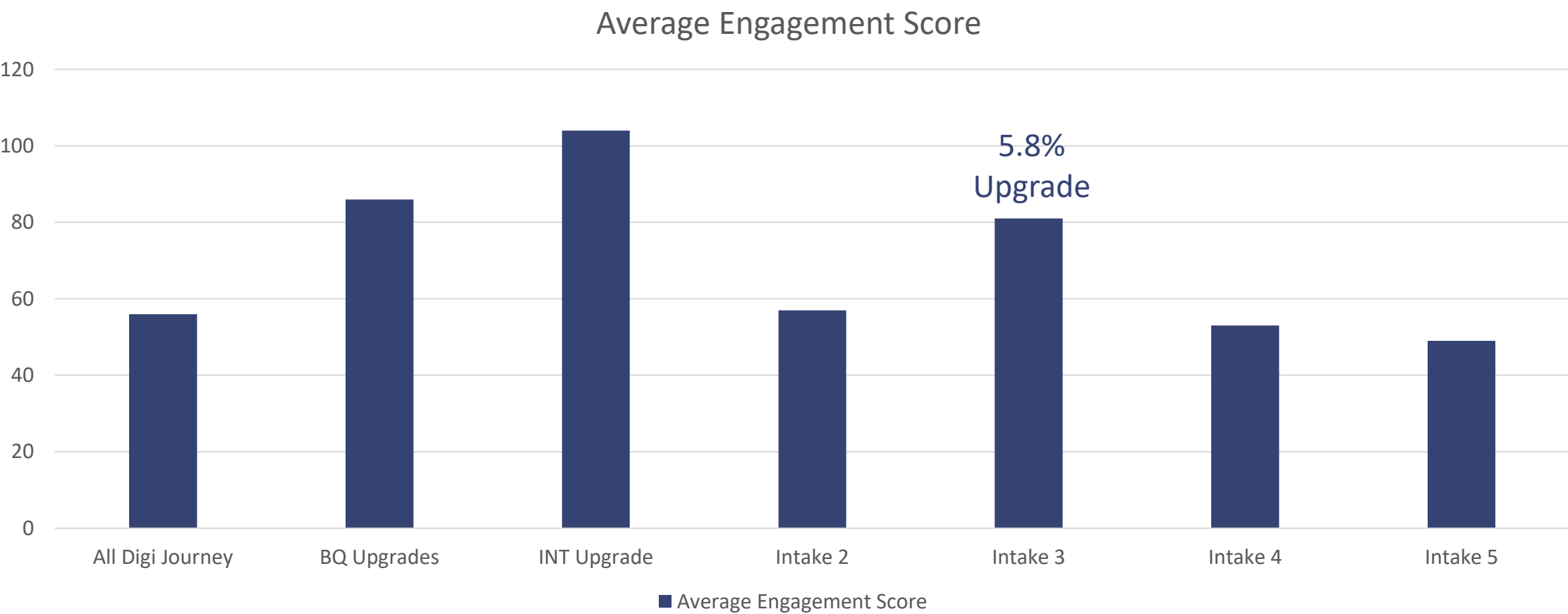
Digital Journey Outcomes

Considerer movement Jun '21 vs Jan '23



Together, unlimited.

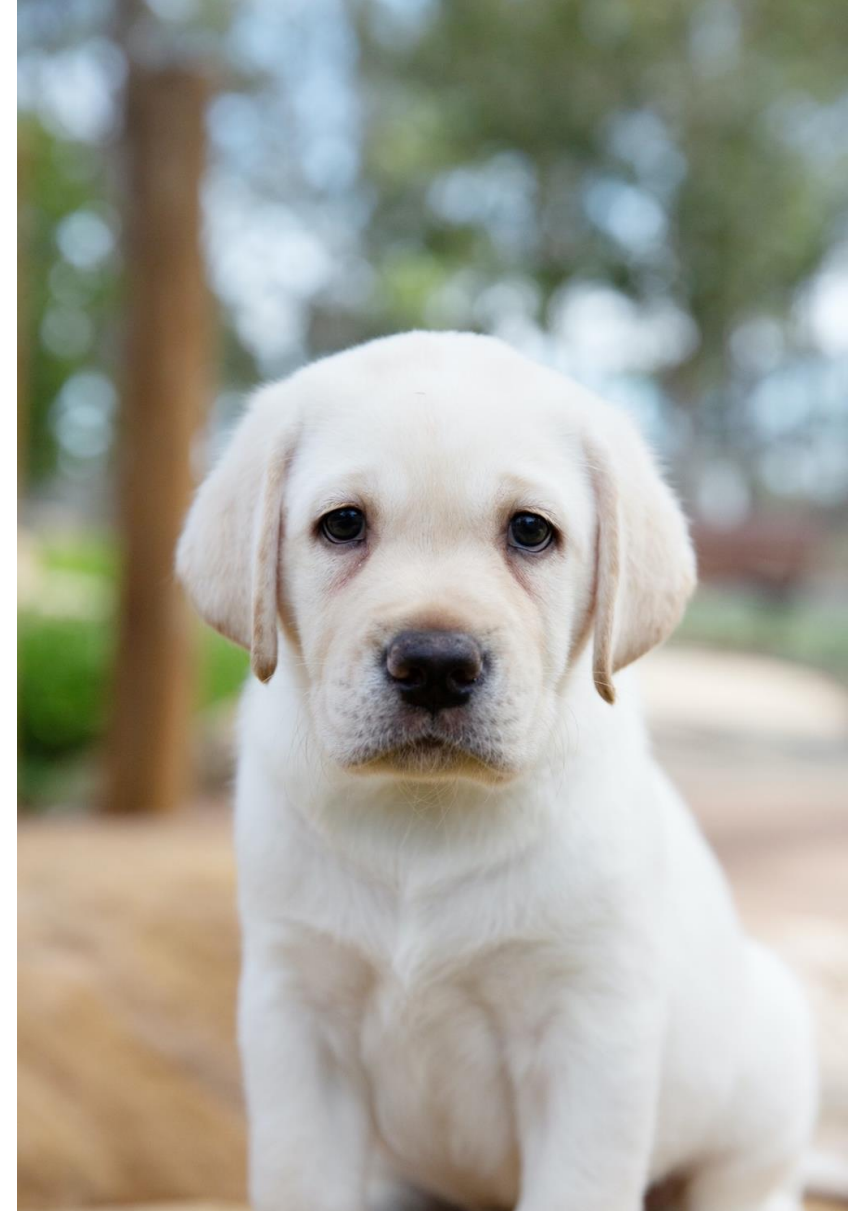
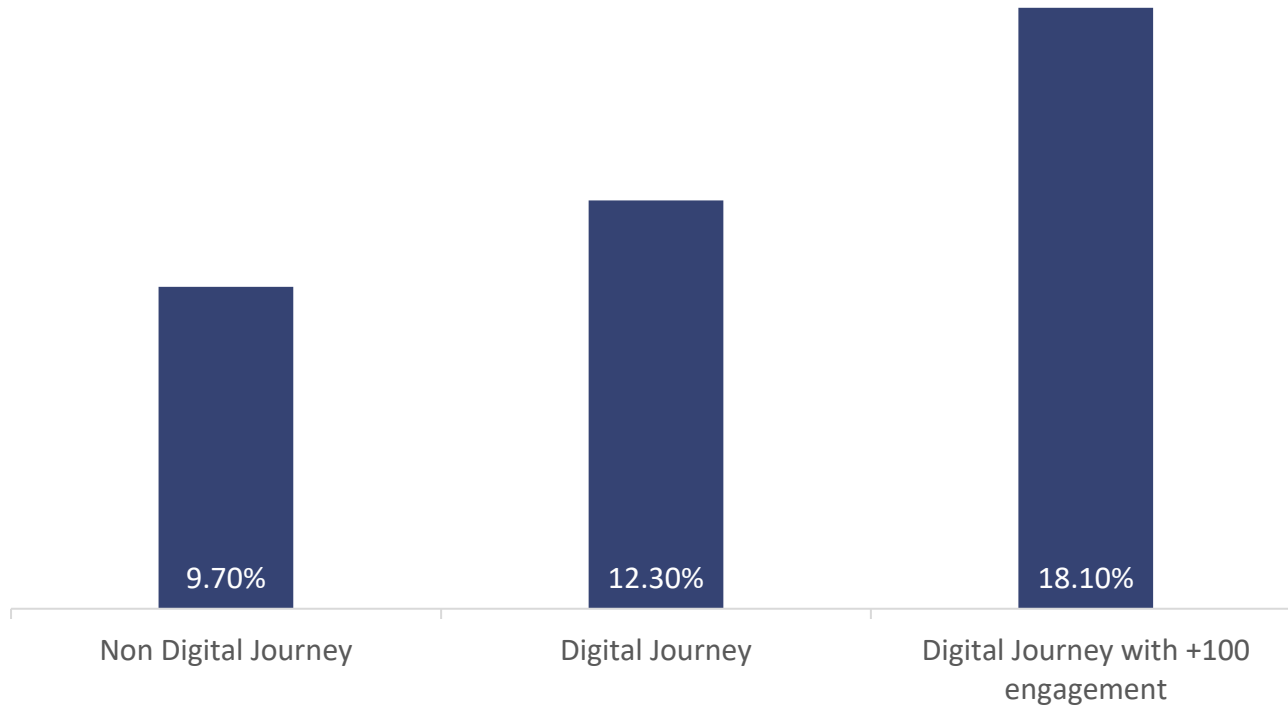
How have considerers been engaging with the journey?



High engagement from upgrades and intake 3 suggests that the digital journey is working

Engaged digital journey also engage in calls and events

% of donors that also attended events or received successful call





Thank you

FIA Conference 2023
Together, unlimited.

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