

FIA

2023  
SA FUNDRAISING  
SHOWCASE

# Gift in Wills Infant Program

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**GRASSROOTS**

**AT THE HEART OF  
FUNDRAISING SUCCESS**

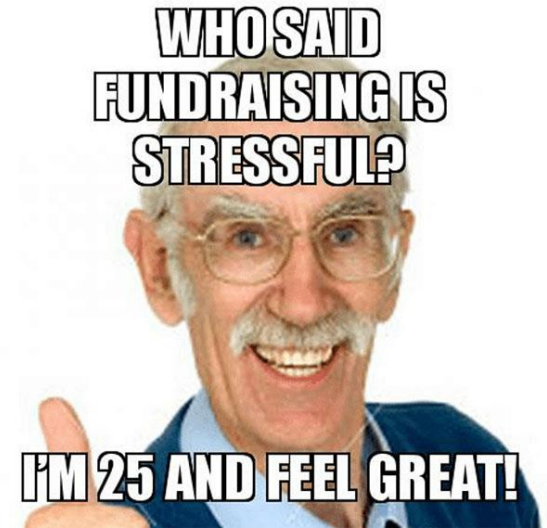
Presented by:



**Safewill**

## Gift in Wills @ Hutt St Centre

- To date, Hutt St Centre has not had a structured Gift in Wills program
- Underdeveloped pipeline (confirmed and potential), reflective of no investment into program
- We've tried!
- Ad-hoc tactics have been implemented such as tick-bo; in 2016 Supporter Survey and in Direct Marketing Appeals
- A data analysis revealed nearly 1,000 prospects in existing supporter base...



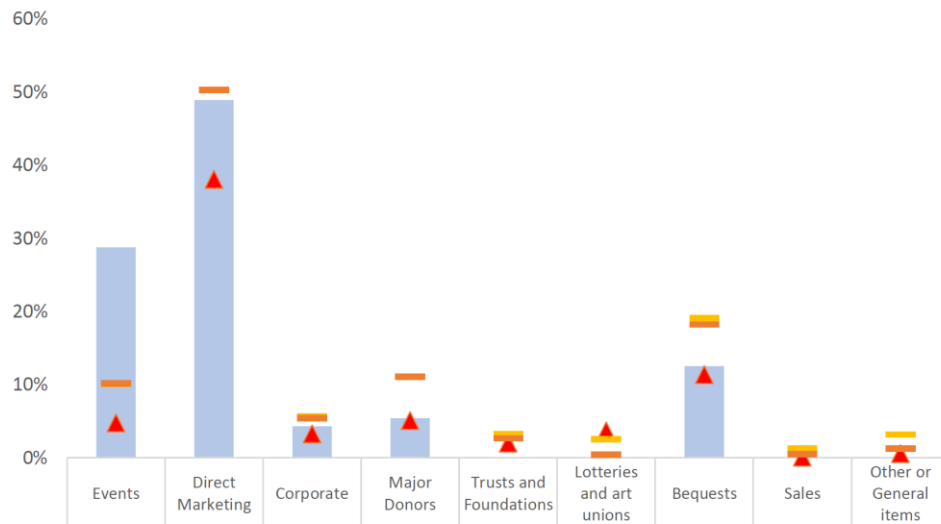
## Gift in Wills @ Hutt St Centre

- Business Case was presented to Board in 2020, and approved... then COVID hit (and focus shifted to flipping our major event Walk a Mile in My Boots from physical to virtual event)
- Annual budget for GiW has been \$200k based on a ten-year average
- A number of historical GiW can be connected to our Catholic origins and the Daughters of Charity
- We have people with Lived Experience of homelessness who have left a GiW, along with volunteers





## Executive Summary - Income Mix



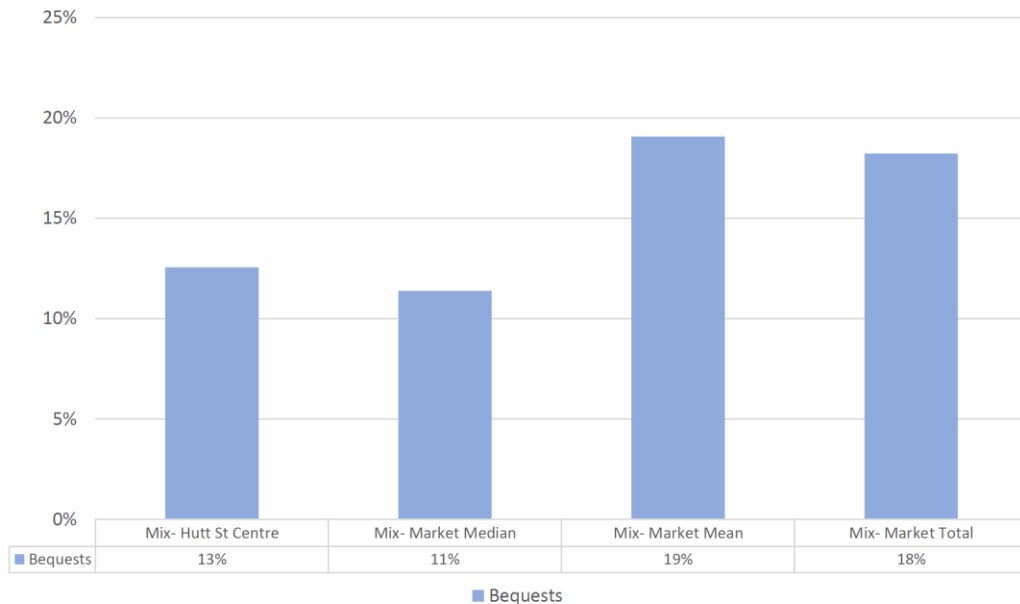
|                     | Events | Direct Marketing | Corporate | Major Donors | Trusts and Foundations | Lotteries and art unions | Bequests | Sales | Other or General items |
|---------------------|--------|------------------|-----------|--------------|------------------------|--------------------------|----------|-------|------------------------|
| Mix- Hutt St Centre | 29%    | 49%              | 4%        | 5%           | 0%                     | 0%                       | 13%      | 0%    | 0%                     |
| Mix- Market Median  | 5%     | 38%              | 3%        | 5%           | 2%                     | 4%                       | 11%      | 0%    | 1%                     |
| Mix- Market Mean    | 10%    | 50%              | 6%        | 11%          | 3%                     | 3%                       | 19%      | 1%    | 3%                     |
| Mix- Market Total   | 10%    | 50%              | 5%        | 11%          | 3%                     | 0%                       | 18%      | 0%    | 1%                     |

### GiW @ Hutt St Centre

- 13% of total fundraising income
- Compared to market avg 18% (national benchmarking by More Strategic)



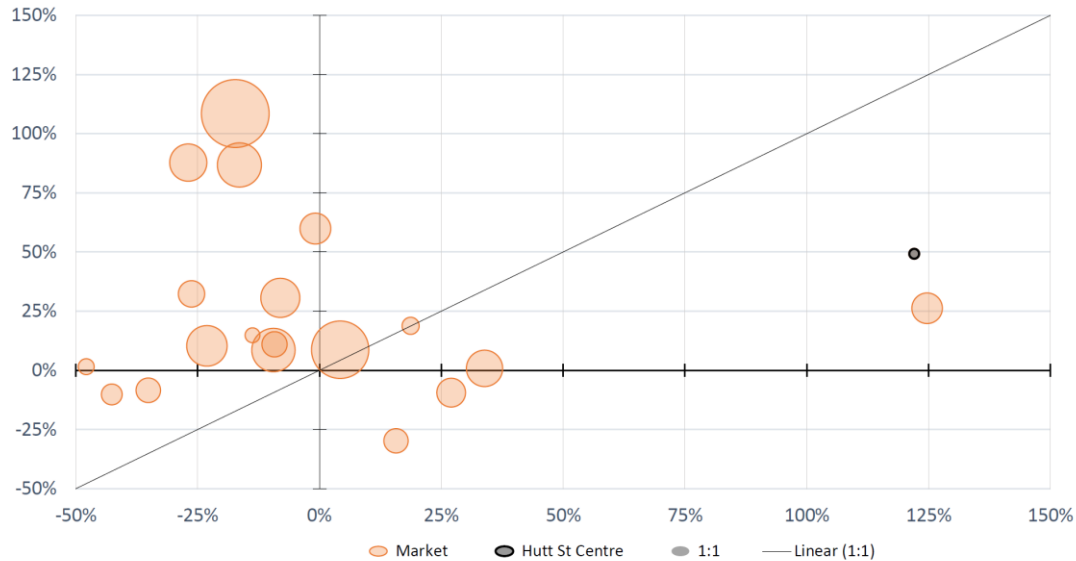
## Executive Summary - Bequest Reliance



Despite not having a structured GiW program – we're not too far off market average!



## Improvement to Non-Bequest Direct Profitability from 2018 to 2022



X axis = Cost growth, Y axis = Income growth, Bubble size = Gross Income



# Challenges

- Internally, focus is on annual fundraising budget
- Reliance on fundraising for over 52% of organisation's annual revenue budget
  - = higher focus on appeals and P2P
- We've experienced strong growth in appeals and P2P in past 5 years
- Corporate support has grown
- We had a capital appeal for a refurbishment
- Competing priorities for resources (that ole chestnut)



# Challenges

- We've stopped and started a number of times...
- Processes to be developed and documented
- Did a survey in 2016... not all leads were followed up
- Had prospects from Appeals tick-box... but can't be sure they were followed-up
- We don't have a dedicated role to focus on planned giving (and it's not in the resource plans in the near future)





## The future is promising!

- ✓ Board has approved investment into GiW program development
- ✓ Foundation Board = strong networks
- ✓ We have very sticky donors, and would now have over 1,000 prospects in our supporter database
- ✓ We have approx. 200 regular volunteers
- ✓ Strong links to legal community – but can improve
- ✓ FY22-23 = \$810k in GiW
- ✓ FY23-24 = already at \$1m in GiW



## Next Steps

- Just start! We're never going to be able to rollout a program all in one go
- Lowest hanging fruit... Oct 23-Mar 24
  - CRM transition from DonMan to Salesforce
  - Develop & document processes (this trips us up frequently)
  - Reporting KPIs / progress
  - Develop basic collateral
  - Article in Autumn 2024 newsletter
  - Supporter Survey in 2024



# Hutt St Centre

end homelessness

## Thank You