

Nine steps to successful bequest programs



Step 1 - Combine the best elements of relationship management and direct marketing

Embrace innovation and implement an integrated direct marketing / relationship management approach to bequest fundraising. Personalised contact and responsiveness to individual supporter needs whilst keeping your ears open to new leads generated through the direct marketing activities.

Step 2 - Acquiring new gift in will supporters

Target specific segments of the public. This will ensure that you're building a pipeline of supporters from which organisations can anticipate high levels of bequest income in the future.

Step 3 - Modifying the tone and language we use to convey our gifts in wills messages

Use a warm, friendly and trustworthy tone of voice. Consider using the phrase '**a gift in a Will**' rather than the word '**bequest**' or '**legacy**'. It:

- is far more accessible to a lay audience and needs little or no explanation
- creates a sense of generosity and compassion and is less intimidating
- helps to immediately break down many of the psychological perception barriers that individuals have about the achievability of leaving a bequest. I.e. a gift doesn't have to be millions of dollars.

Step 4 - Recognising the current reality of existing supporters

When connecting with existing supporters, it is highly unlikely to be precisely the right time for them to update or revise their Will. Your communication / marketing program should inspire increased levels of emotional commitment from supporters to including a gift in their Wills. It is important that the organisation remains in the front of mind until there is a practical trigger for them to update or revise their existing Will.

Step 5 - Reinforcing cross-organisational support for gifts in wills

An effective gift in will program requires key messages to permeate across the organisation – board members, staff, volunteers - so that it becomes a natural part of the dialogue and the offerings the organisation has with supporters, ambassadors and the local community who are interested in your current programs and projects.

Step 6 - Contributing towards growing the gift in will market in Australia

Include a Charity is a not-for-profit consortium of 145 of Australia most innovative and successful bequest fundraising charities. They aim to increase the proportion of Australians who have included a charitable gift in their Will from 7.5 % to 12%. Organisations that actively participate in this social-change campaign will gain considerably from the overall increase in the bequest marketplace that will result from the success of this initiative.

Step 7 - Promoting the organisation and gifts in wills to a cold audience

One of the critical success factors is the organisation's ability to increase its visibility and relevance to a wider public audience.

- **Inspiring factors** - having a clear vision, demonstrating significant progress towards their stated goals, illustrating the need for the charity and its importance to the community.
- **Reassurance factors** - having a good reputation within the community, a sense of being well-established with a demonstrable track record of achievements over time.

To be clear, this is not about specifically marketing or promoting gifts in wills to the organisation, but rather increasing the general awareness and building confidence in the organisation as a trustworthy charity that is making a difference to something that is important to an individual.

Step 8 - Financial management of gifts in wills and minimising legal challenges

An integral part of any effective gifts in wills programs is effective and timely estate administration processes supported by appropriate legal advice. Charities with significant bequest programs have specialist staff resources dedicated to overseeing the ongoing estate administration process and financial management issues connected with complex bequest gifts. For smaller organisations, as it is unlikely you would have this level of resourcing available, a good option is to set up a relationship model, ie the same member talks to the same key supporter, builds rapport and establishes a consistent contact point.

Step 9 – Inspiring gifts in wills stories

Organisations must reinforce their ability to report on the impact that gifts in wills have on advancing their mission and vision. Clear policies and procedures for making decisions about how and when gifts in wills are spent will strengthen the organisation's ability to accurately convey the impact that gifts in wills have in progressing the organisation's mission and provide an inspiring case for support for our existing supporters to include gifts in their wills in the future.