

# How to put Gifts in Wills at the heart of every donor conversation

GIFTS IN WILLS TRACK

Erin McCabe, Senior Manager – Supporter Engagement  
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Royal Flying Doctor Service (Queensland Section)



Gifts in Wills Track  
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# Why Gifts in Wills?



Gross income from Bequests has risen by 126% over the past 10 years.

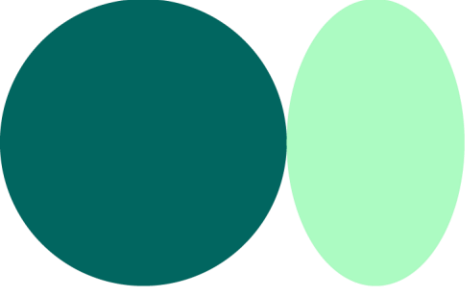
Outstrips growth in all other individual giving types, apart from RG.  
*(Pareto – State of the Donation 2019).*

Gift in Will average return per \$1 is \$28.

In 2020, for a smaller data set of 30 charities, the return was still \$24, well above the next highest performing category, Trusts and Foundations at \$9.80  
*(More Strategic & Include a Charity 2021)*

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**The largest  
inter-generational  
transfer of wealth.**

**Ever.**



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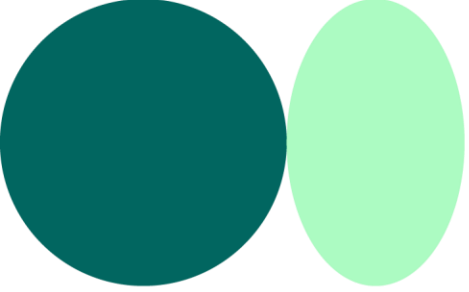
# This is how baby boomers feel!



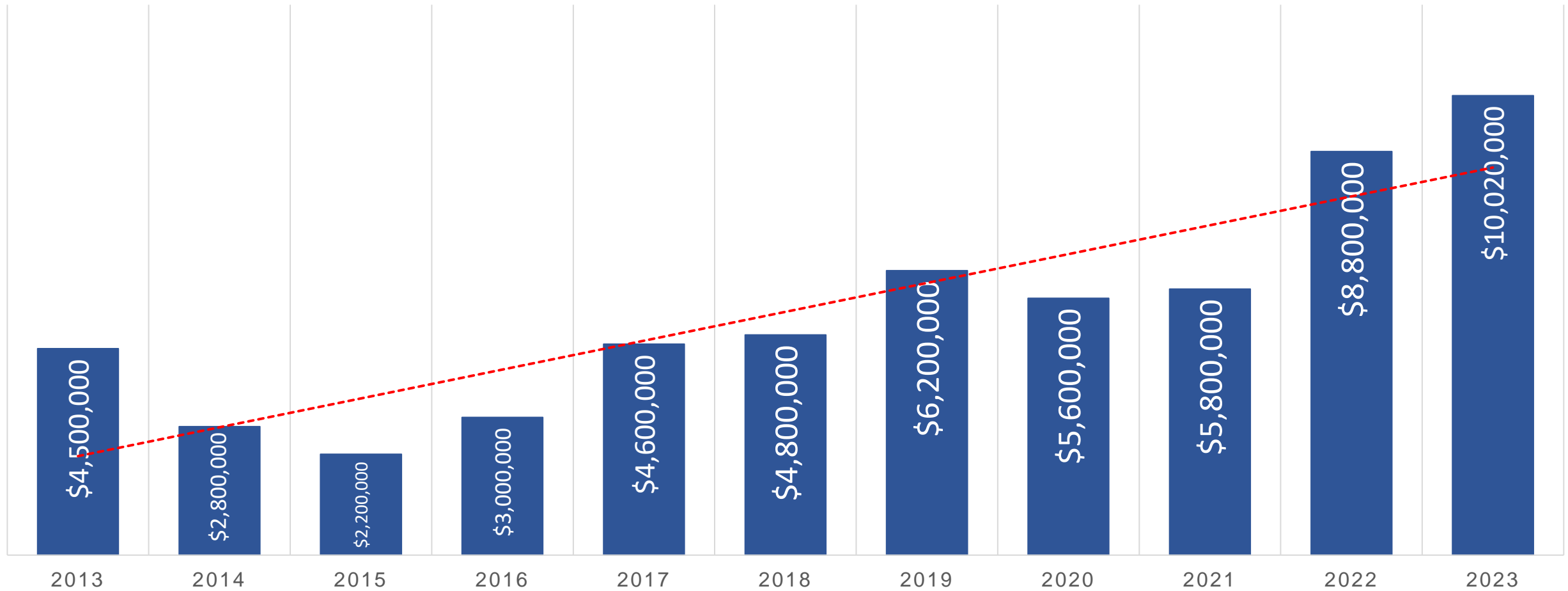


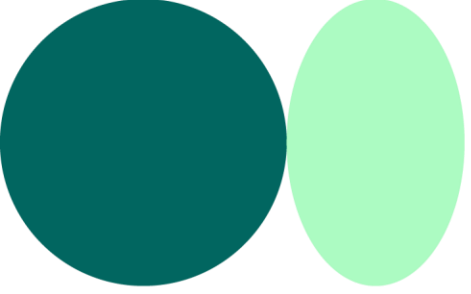
**It is estimated \$1.1 trillion of wealth will be transferred across a generation over the 10 years to 2030 in Australia and \$2.6 trillion by 2040.**





# GIW at RFDS QLD





# In 2013 we had a brochure & a survey...

## A snippet from the evaluation of learning & past results in 2013:

*“Results reflect the resources directed to the GIW program. The number of confirmed bequests had grown significantly since 2010.*

*April 2011 there were 76 confirmed bequestors*

*February 2013 this number has grown to 268 (252% increase).*

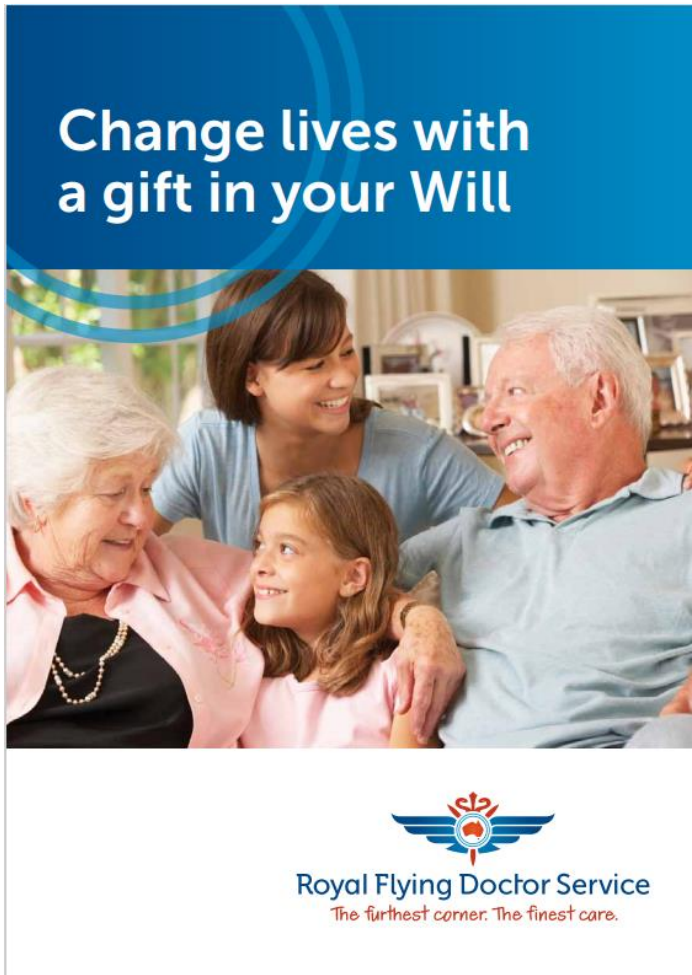
*This increase was achieved through*

- a survey in 2011*
- a targeted mail out to existing long-term donors*
- bequest information sent with all relevant direct mail*
- updated collateral and website information. ”*


10. The RFDS first took flight in 1928 thanks to a generous bequest from Hugh McKay. To plan for the future it would help us to know how many people support us in their will or would consider leaving a bequest. Which of the following statements best describes your circumstances?
- I have already made arrangements to leave a bequest to the RFDS (Queensland Section).
  - I intend to leave a bequest to the RFDS (Queensland Section) when I next update my will. Please contact me with more information.
  - I don't currently have a will but may consider a bequest to the RFDS (Queensland Section) in the future. Please contact me with more information.
  - I have written a will but have chosen not to include the RFDS (Queensland Section) at this stage.
  - I do not have a will.





# In 2016 we had a (*newer*) brochure & a survey...



Change lives with a gift in your Will



  
**Royal Flying Doctor Service**  
The furthest corner. The finest care.



All bequests, no matter what their size, can help improve the lives of Queenslanders in need.

### Why Bequests?

If you've already been thinking about your legacy, and the possibility of leaving a gift in your Will to the RFDS (Queensland Section), thank you sincerely. You may already support the work of the RFDS. You may even have been helped by the Flying Doctor or know someone who has, one of the 85,000 people in Queensland helped by the RFDS each year.

After remembering your family and friends, please consider leaving a gift in your Will to the RFDS (Queensland Section). You don't have to be wealthy to leave a gift in your Will. All bequests, no matter what their size, can help improve lives.

Leaving a bequest won't affect your lifestyle today, but it will improve the lives of many others in the future. By including the Flying Doctor in your Will, you can make a world of difference to someone who urgently requires our help.

2 ROYAL FLYING DOCTOR SERVICE

### Bequest Response Form

Please complete this form and return it to us. All of your information will remain confidential.

I am considering including the Royal Flying Doctor Service (Queensland Section) in my Will, and would like the Bequest Officer to contact me to discuss this further.

I have included the Royal Flying Doctor Service (Queensland Section) in my Will.

Mr  Mrs  Miss  Ms  Dr  Other

First name \_\_\_\_\_

Surname \_\_\_\_\_

Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ P/Code \_\_\_\_\_

Email \_\_\_\_\_

Phone (home) \_\_\_\_\_

Mobile \_\_\_\_\_

Date of birth (optional) \_\_\_\_\_

**Thank you for your support.**

Please mail your completed coupon to:  
Bequest Officer  
Royal Flying Doctor Service of Australia (Queensland Section)  
Reply Paid 64275  
Brisbane Airport QLD 4008

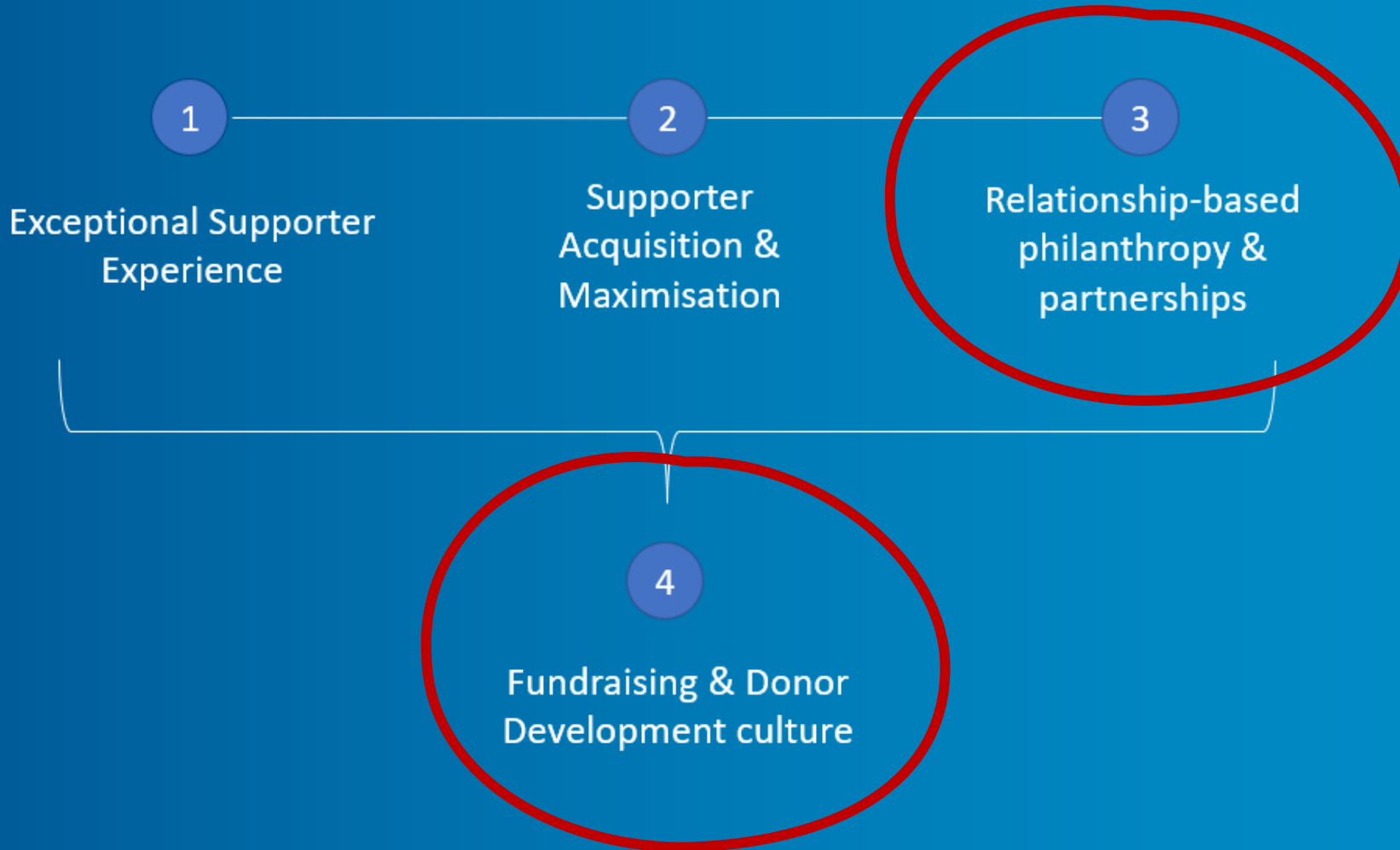
In recognition of the significance of your decision to remember the Flying Doctor in your Will, we would like to include you as a valuable member of our Companions of the RFDS Alliance.

# Who is responsible for GIW?



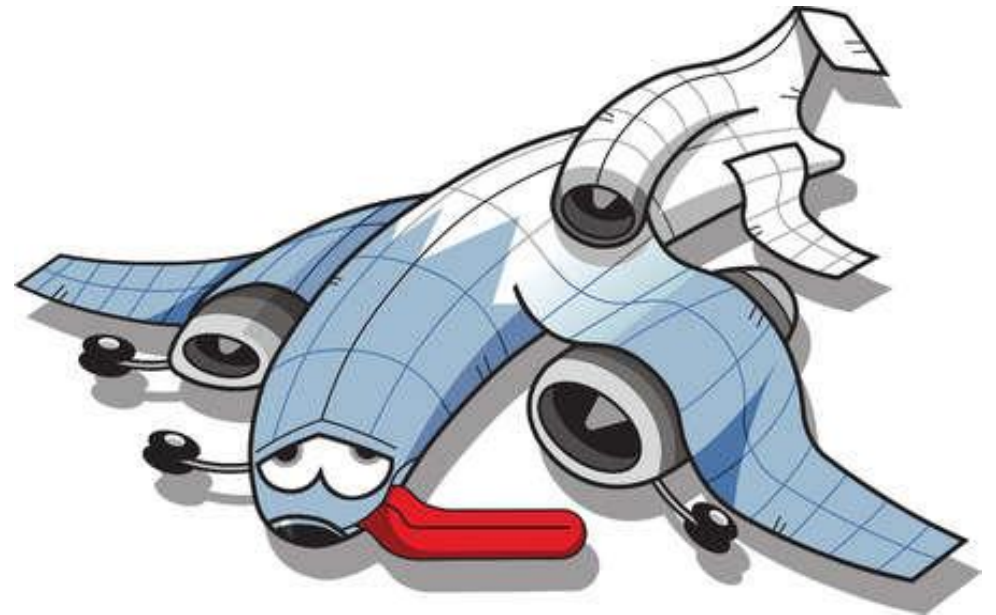
Back in 2013  
there  
was one lonely  
Bequest Officer.

# Fundraising Strategic Pillars



# What will stop you taking off ?

1. Not measuring the right KPI's that track progress over time and the triggers that result in increased income
2. Fundraising success being perceived as short term, with a focus on immediate cash revenue and Year 1-2 ROI.
3. Underinvestment in a fully integrated and embedded strategy





“I have always had an appreciation for the work of the RFDS. Leaving a G... going to be m... acknowledging the... work of the RFDS.”



IAC WEEK 4-10 SEPTEMBER

# A shift in mindset internally

All stakeholders, at all levels must understand the value of a GIW

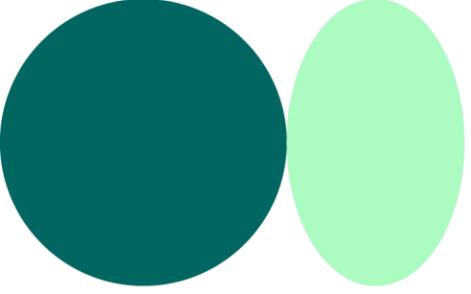
CEO  
Board  
Wider Organisation  
Fundraising Team  
Supporters

# Gifts in Will is everyone's job

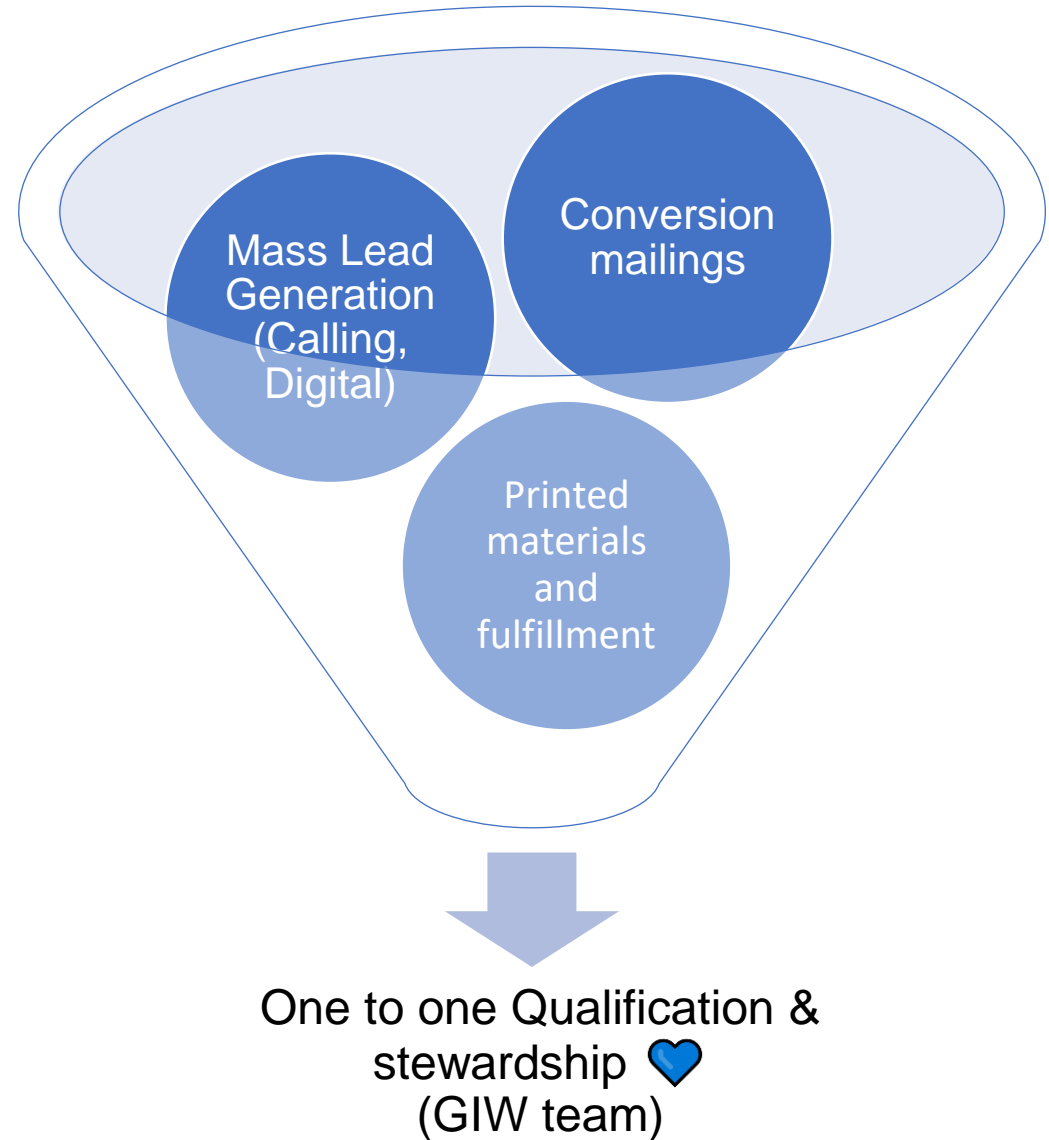


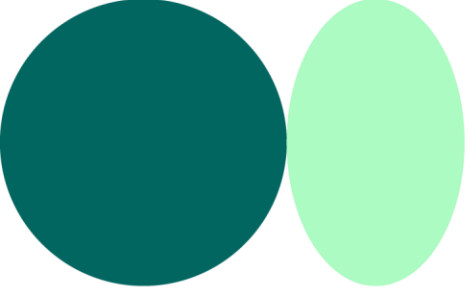
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**But practically speaking, what does that actually mean?**





# Digital Acquisition Case Study: Putting Gifts in Will first

 **Royal Flying Doctor Service - Queensland Section**  
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“In a small way, I think every day I do make a difference.”

Dr Shauna Taylor is a Medical Officer at our Charleville RFDS base. She’s proud of the difference she makes for Queenslanders who live far from medical care.

But you don’t have to be a doctor to be a part of our life-saving team.

Dr Shauna has decided to leave RFDS a gift in her Will. She knows her gift will help RFDS continue, “to provide the quality care to people of the bush and ultimately impact on patients’ lives.”

Please consider the difference you, too, could make with a gift in your Will. **CLICK BELOW** to find out more.



Dr Shauna Taylor,  
Medical Officer, RFDS  
(Queensland Section)

**“You don’t need to be a doctor like me to make a difference.”**

FLYINGDOCTOR.QLD.ORG  
**CLICK** to request your **FREE** gift in Will guide [Sign up](#)

👍 Like    💬 Comment    ➦ Share

 **Royal Flying Doctor Service - Queensland Section**  
Sponsored • 🌐

When you, or someone you love, finds themselves facing a medical emergency — every kilometre from care matters.

👉 **CLICK BELOW** to find out how a gift in your Will can help us go further for every patient we care for.



**To every corner,  
for every patient,  
in every emergency,  
we’ll be there.**

FLYINGDOCTOR.QLD.ORG  
**CLICK** to request your **FREE** gift in Will guide [Sign up](#)

👍 Like    💬 Comment    ➦ Share



# 2020: Dipping our toes in the Digital Pool

- In 2020 we turned digital acquisition of any kind on, for the first time with 2 Step RG Acquisition.
- We had to turn off leads after 10 days 🤖
- We were experiencing the golden glow of 2 step RG Acquisition and saw an opportunity to do more!

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👉 What do you need in a 'go anywhere' first aid kit? The Flying Doctor has you covered with this helpful checklist. ✅

A well-stocked first aid travel kit is a must-have for your car 🚗 boat 🚤 caravan or backpack, especially if you'll be far from help. 🤖  
In an emergency, the Royal Flying Doctor Service will be there for you; but with a first aid travel kit you'll be prepared for the rest.  
Whether starting from scratch, or checking if your kit is up to scratch, the Flying Doctor can help. Click for your FREE checklist! 📄

**CLICK FOR YOUR FREE CHECKLIST**

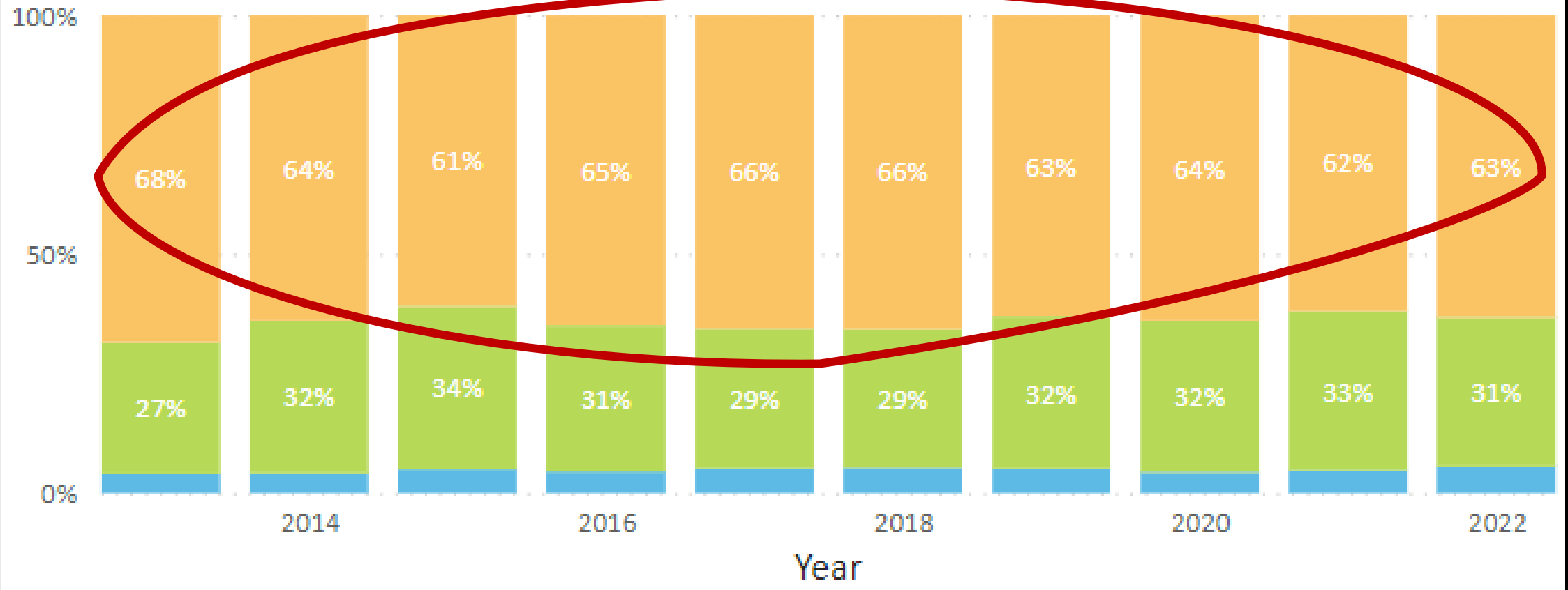
The Flying Doctor first aid travel checklist.

Click for free Flying Doctor first aid travel checklist ✅ [Download](#)

👍 Like    💬 Comment    ➦ Share

# GIW Gifts

Type ● Existing Known ● Existing Unknown ● Unknown



**WHY: Over 60% of GIW come from people we don't even know exist**

# 2021: A GIW Pilot

Three propositions with slightly different journeys were launched:

## 1. Direct to Bequest

A clear, direct ask to garner high quality GIW leads to niche audience that mirrored current GIW pool. These leads were qualified in house.

## 2. High Intent Leads

A less direct ask (no mention of GIW or bequests in Ads) to a wider audience to acquire lower cost leads. Qualified in house.

## 3. Choose your own adventure

A Pledge to show you care or want to support RFDS. Lower cost, higher volume leads, passed to a call centre to qualify. Call centre could do a GIW ask, RG or SG ask, depending on the call.

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"I was terrified. I knew Ollie needed to get to hospital as quickly as possible." Ebony describes the frightening moment she was told her baby's airway could be closing up.

With emergency care more than 400 kilometres away, the Flying Doctor was alerted. Ebony and 10-week-old baby Ollie were flown to Mount Isa, then rushed by ambulance to hospital for the urgent treatment Ollie needed.

"... it meant everything to know the Flying Doctor was there for us. I had no idea that I would need them as badly as I did."

Across the furthest corners of our state, mothers like Ebony feel safe in the knowledge they can count on the Flying Doctor — thanks to the support of people like you. 🙏

Click to show your support for the Flying Doctor >

Ebony, Joe and baby Ollie

FLYINGDOCTOR.QLD.ORG  
I'd like to find out more about supporting the Flying Doctor [LEARN MORE](#)

**Royal Flying Doctor Service - Queensland Section**  
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The Flying Doctor has a proud history of providing world-class aeromedical care to outback Queensland. And we are committed to continuing to serve these communities, well into the future.

With a gift in your Will, you can help us go further generations to come — to go 'Above and Beyond'.

Please consider a gift in your Will. [CLICK BELOW](#) to find out more.

Will you help the Flying Doctor go 'Above and Beyond'?

[Click for a gift in Will brochure >](#)

FLYINGDOCTOR.QLD.ORG  
[CLICK to request a gift in Will brochure](#) [LEARN MORE](#)

Like Comment Share

# How did we go?

|                 | Direct to Bequest<br>😎 | High Intent Leads<br>😬 | Choose your own<br>adventure 😎 |
|-----------------|------------------------|------------------------|--------------------------------|
| Leads generated | 54                     | 13                     | 508                            |
| Cost Per Lead   | \$184.51               | \$377                  | \$40                           |
| Confirmed       | 1                      | 0                      | 2                              |
| Considerer      | 27                     | 3                      | 34                             |
| Intender        | 6                      | 0                      | 0                              |
| Regular Givers  | N/A                    | N/A                    | 37                             |

# So what next?

Relaunched Direct to Bequest delivered in bursts over a 10 month period from July 2022 through to April 2023

Will you help the Flying Doctor go 'Above and Beyond'?

Click for a gift in Will brochure

Above and Beyond

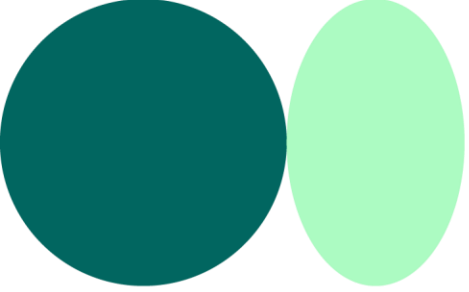
Prudence

CLICK to request a Gift in Will brochure >

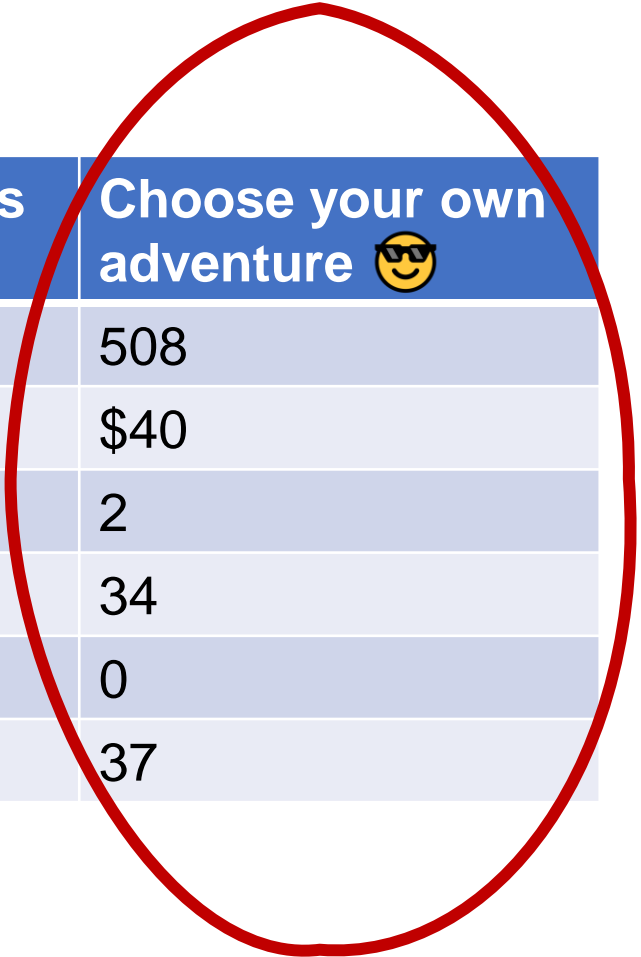
A gift in your Will helps us go 'Above and Beyond'.

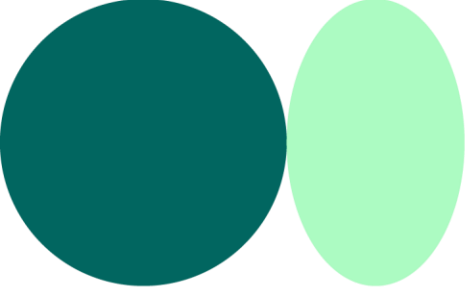
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|                 | Direct to Bequest 🤗 |
|-----------------|---------------------|
| Leads generated | 215                 |
| Cost Per Lead   | \$223.25            |
| Confirmed       | 5 (was 3)           |
| Considerer      | 165                 |
| Intender        | 6 (was 8)           |
| Regular Givers  | N/A                 |



|                 | Direct to Bequest<br>😎 | High Intent Leads<br>😬 | Choose your own<br>adventure 😎 |
|-----------------|------------------------|------------------------|--------------------------------|
| Leads generated | 54                     | 13                     | 508                            |
| Cost Per Lead   | \$184.51               | \$377                  | \$40                           |
| Confirmed       | 1                      | 0                      | 2                              |
| Considerer      | 27                     | 3                      | 34                             |
| Intender        | 6                      | 0                      | 0                              |
| Regular Givers  | N/A                    | N/A                    | 37                             |





GIW

Major Donors

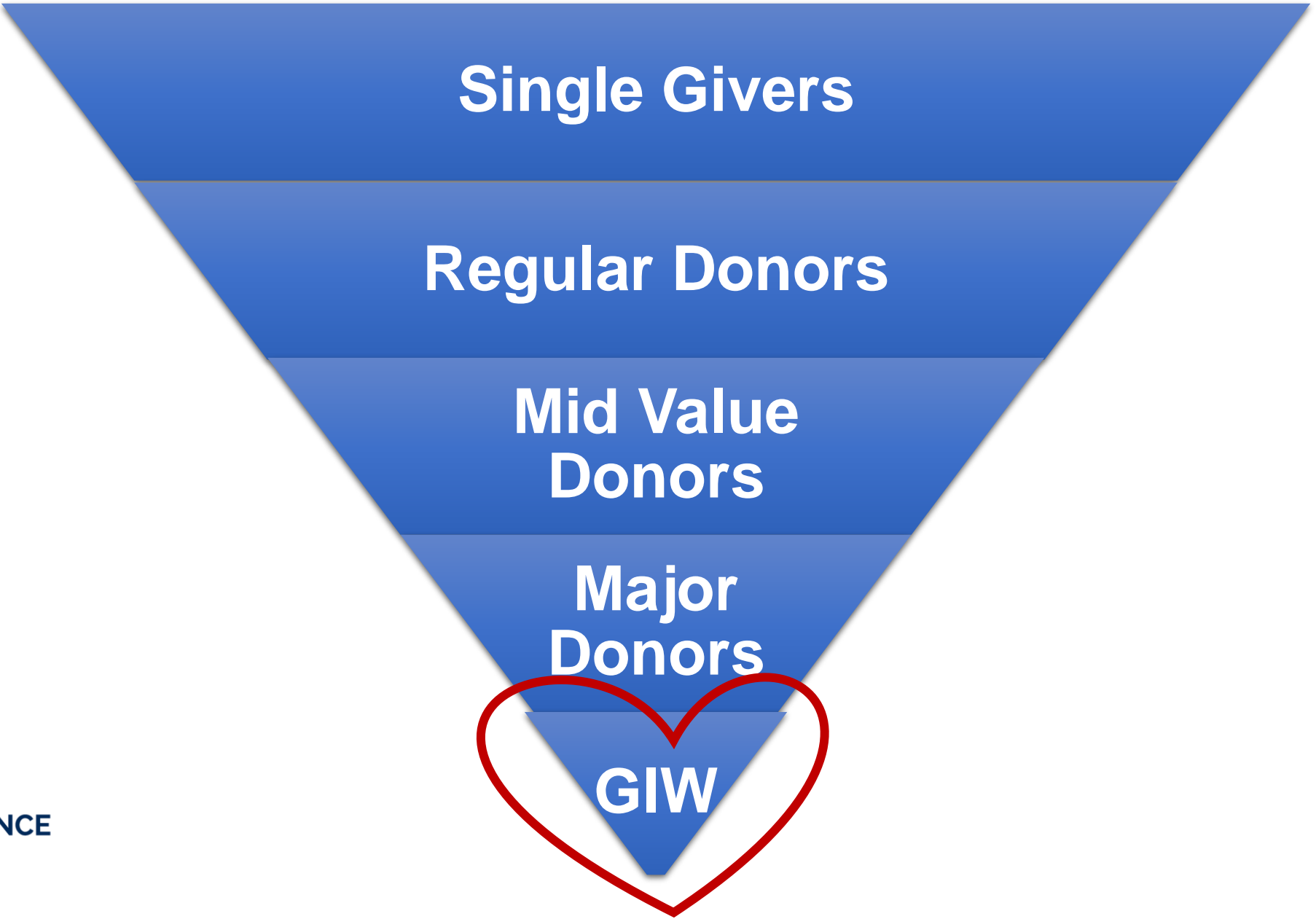
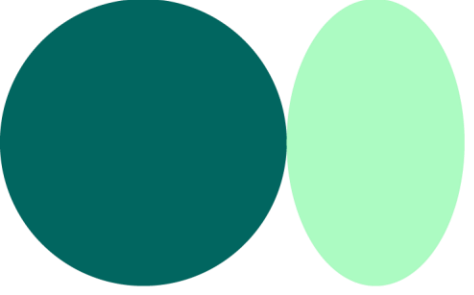
Mid Value Donors

Regular Donors

Single Givers

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# And so, Brand Love was born



|                 | Brand Love       |
|-----------------|------------------|
| Leads generated | 689              |
| Cost Per Lead   | \$58.22          |
| Confirmed       | 1                |
| Considerer      | 13               |
| Intender        | 1                |
| Regular Givers  | 39 – Avg \$27.50 |
| Single Givers   | 8 – Avg \$63     |

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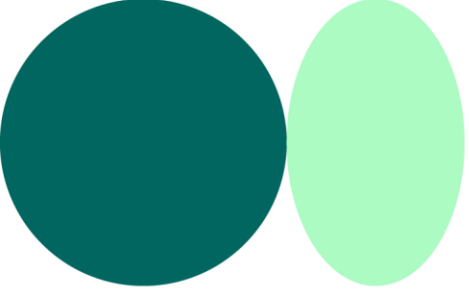
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# Learn, optimize, rinse, repeat

## We took the learnings from Brand Love and applied the cascading ask to our Supporter Engagement Survey Primed calling

- We captured more GIW leads by expanding our priming audience due to the cascaded RG ask
- Generated 43 new RGs generating immediate ROI to the GIW campaign (*plus 8 others who said no to an RG came on board as a GIW considerer*)





# Confirmed GIW supporters love your organization!

*They want to help*

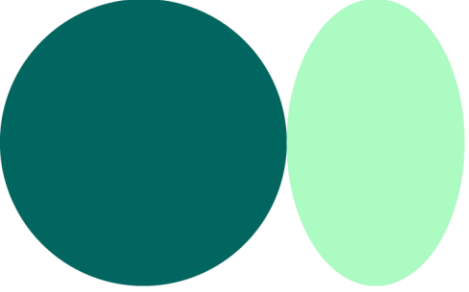
## What can happen when we know about that 60%?

- Gifts can be brought forward in lifetime
- Gifts can be upgraded
- GIW supporters can influence friends and relatives when stewarded well
- Most importantly, we can thank them, and they can feel the joy of giving in their lifetime



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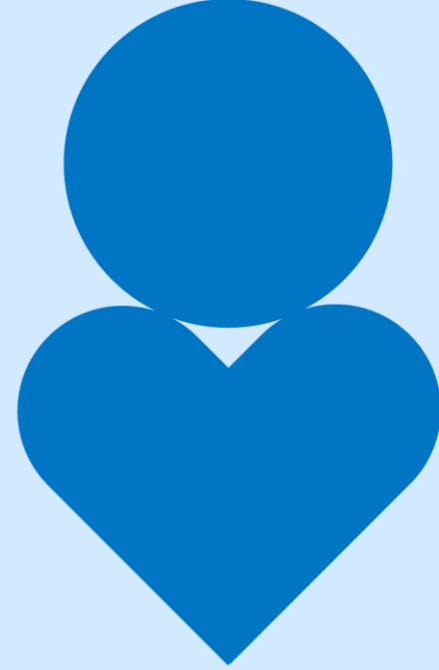


# Key Takeaways

- **If not now, when?**  
There will never be a better time to review your GIW strategy
- Be proud and proactive about GIW with your donors
- GIW are not to be feared!  
It's not a dirty word. We can and SHOULD talk to our donors about it (*including online*)
- GIW cannot be siloed to one team to build a solid pipeline
- **A high functioning team + clear strategy = so much more than a GIW**



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Conference**  
2024



**Thank you**



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