Delivering a targeted and integrated appeal within an ethical communication strategy.

INDIVIDUAL GIVING TRACK

Louise Woods and Lavina Huggett

The Smith Family

FIA CONFERENCE

Individual Giving Track Sponsored By:





Overview

- Context timing, lead-in testing, external environment.
- Creative Strategy.
- Integrated Approach.
- Campaign Elements.
- Results.



Context



Christmas

November – December

36% of income.

Single Gift Acquisition

Back to School

January – March

12% of income

Sponsorship Acquisition

Winter

May – June 52% of income Single Gift Acquisition

Context



- Affluent
- Highly educated
- Professional





Context



- May/June 2023 (Tax Time)
- 4-year growth trajectory.
- COVID
- Cost of living pressures
- "FrameWorks" testing project.





Campaign Aims



Not just about the money...

- Income. Of course 🙂
- Reversing the decline in donor acquisition.
- Validation of our FrameWorks testing.
- Framing cost of living pressures as a relevant ask proposition.
- Stress testing our values alignment.



Campaign and Creative Strategy

Process

- Case Study
- Creative Territory
- FrameWorks
- Values alignment approach
- Integrated and multi-channel
- Targeting and segmentation

Case Study and Creative Territory

Aged 8 years old living with his parents and twin sisters, aged 3. Money is so tight now that both parents work several extra shifts each week and their income barely covers their family and home essentials. Their last rent increase meant they had to move to a smaller home which is now busy and cramped. Nic does his homework on the kitchen table in between mealtimes.

> Neither of his parents has the capacity to support him with homework and the **financial stress** at home is palpable. Nic's ability to stay focused in class and keep up with his homework is now **seriously affecting his academic progress**.



Case Study and Creative Territory

WINTER 2023 Creative Territory

Get: Australian charity givers (both existing and prospective)									
CAMPAIGN OPPORTUNITY	To: Respond to the 2023 Winter ap tomorrow.	opeal with a financial gift to empo	inancial gift to empower Australian children in need to learn today and change						
CITCRICIT	By: Connecting them with our vision of a world where every child has the chance to change their future.								
DEEP HUMAN TRUTH	this. But then, when I start to realise	When I see a straightforward problem to be solved or task to be done, I come at it with a sense of comfort and ease – I've got this. But then, when I start to realise that something essential isn't there – a piece of the puzzle is missing I get frustrated and confused . My confidence is rocked , and I get an unnerving sense of disempowerment .							
TENSION FOR OUR CHILD	I try my best in class and usually understand what I'm supposed to do. I used to be good at school. Lately I just keep getting the answers wrong – not like my friends. I just don't know what else to do – I'm confused . It's embarrassing in class, and I don't know who can help. I'm so overwhelmed that I feel like I can't even try anymore. I don't want to ask Mum and Dad because I know we can't afford anything anymore and they seem so worried all the time.								
DONOR TENSION/POV	financial circumstances? When I se bewildered and have a huge sens	This doesn't make sense! We live in such a wealthy country. How is it that an Australian child is held back at school by their financial circumstances? When I see a child struggling at school despite obvious ability and commitment, I feel completely bewildered and have a huge sense of injustice. It's just All Australian kids should have what they need to reach their potential. Poverty should not stand in the way of that.							
CREATIVE PROPOSITION	Nic should not be held back by poverty in a country such as Australia. Your gift can change the equation for him and many other Australian children living in poverty.								
THE SITUATION (CASE STUDY)	All that should add up to success a Unfortunately, there is NOTHING U across Australia are being forced to	Nic has hopes and dreams like any child. He has determination, a loving family, and a school that does its best to support him. All that should add up to success at school – but it doesn't, because of the challenges he faces because of poverty. Unfortunately, there is NOTHING UNUSUAL about Nic's situation right now – thousands of ordinary, hardworking families across Australia are being forced to make impossible choices as the cost-of-living crisis pushes them further into poverty, and it's having a devastating effect on many children's education and prospects for the future.							
Invitation to Supporter		Brand Promise	Value Proposition	Reason to Believe					
Nic's situation is common, but it shouldn't be.		A proven network of practical,	The Smith Family supports	We innovate for impact.					
We live in a community of relative wealth and generosity and there are proven, evidence-based solutions that can ensure		emotional, and financial support that empowers young people to	children living in poverty with targeted out-of-school	We are dedicated and disciplined.					
children living with poverty get that "missing piece of the puzzle".		harness education, building skills	learning and mentoring	We make change from solo to					
Be one of the people who helps to turn this situation around.									

We provide end to end support.

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FrameWorks Testing and Application

- •18-month test and learn project.
- Supporting our Brand Refresh 1.Informed by consultation and research.

2.Intention to represent those we serve with dignity.

3.Stop/reduce negative stereotyping.

4.Long term aim to influence public discourse.

From this....





To this....

Every child deserves the chance to keep up and thrive...

...but every day poverty makes it tougher for Amy.

Every student needs strong supports to do well. But for Amy, poverty means she doesn't have the things she needs for school.

Teachers do all they can, but children like Amy still need your help. Your sponsorship will provide the essentials and extra learning support a child needs to catch up and thrive.



SPONSOR AN AUSTRALIAN CHILD TODAY.

Q The Smith Family

L 1800 497 074



Creating better futures together everyone's family





Large Scale Testing Winter and Christmas 2022

- Same case study and "problem/solution" proposition.
- Same actor, wardrobe and location
- Two separate creative strategies.
- Different tone of voice developed for each.

Test Group	Control Group
NSW, ACT, SA and WA	VIC, QLD, TAS and NT
Child represented as having agency and aspiration.	Child represented as cared for, but isolated and despondent.
Language that leaves open possibility Emotion grounded in connection with the aspiration. Tension created t hrough risk to the child's potential.	Emotionally evocative language. Child's situation as dire. Highly emotive terms to generate tension.

2022 Winter Appeal

- Test: Anna has capacity and potential what is possible; what is fair.
- Control: Absolute language, focus on deficit (without you; never be enough).

Test



All children need support to succeed at school.

But for many children, poverty blocks their progress at every turn. Teachers do all they can, but these students need more.

Help give children like Anna' access to the extra out-of-school learning support they need to catch up and clear their path to success.



Control





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2022 Christmas Appeal

- Test: Aspiration of the child and parental support front and centre.
- Control: Emotional punch that undermines hope/aspiration. •

Phase 1 Test



Poverty is holding Sophie back, but she's still so determined to learn

1 in 6 Australian children live in poverty n is one of the most powerful change agents, and leserve the opportunity to fulfil their potential. very child. Sophie needs support to thrive at schoo With your support she can access extra out-of-school learning support, a and change her future

Please donate today. Q The Smith Family \ 1800 024 069



Phase 1

Contro "Mum says I can be anything.. I just want to be better at school."

Sophie is so determined to learn but poverty holds her back every day.

Sophie; aged 8

1 in 6 Australian children live in poverty. Education is one of the most powerful change agents But children like Sophie often don't have what they ne for school and fall behind. Some may never catch up

Help children like Sophie overcome educations inequality and change their future by giving them access to extra out-of-school learning support.

Please donate today.

Q The Smith Family \ 1800 024 069



Phase 2 Test

Every child deserves the chance to reach their full potential.

Sophie's determination may not be enough to stop her falling behind.

Like 1 in 6 Australian children, Sophie[•] lives in poverty.

Many don't have what they need for school and can fall behind You can help this Christmas

With your support today, children like Sophie can access extra out-of-school learning support to catch up, keep up at school and change their future

Please donate today. Q The Smith Family \ 1800 024 069



Phase 2





FrameWorks Application

Learnings and challenges.

- Existing supporters responded as well, if not better, to the FrameWorks approach.
- Creating tension and urgency within the FrameWorks parameters has been challenging – the short cut to a sharp emotional nudge to attract prospects remains a challenge.
- Creative fundraising challenge to illustrate a clear problem while maintaining dignity for the child & family.



FrameWorks Application

We grounded the appeal in the Shared Goals Narrative that creates tension by putting a universally held value at risk

No child should experience this equation:

A smart little boy with big dreams, doing his best every day.

A wealthy country with a great education system.

Teachers

going the

extra mile

to help.

BUT NIC* IS STILL FALLING BEHIND BECAUSE OF POVERTY.

Nic has hopes for the future, like any child — but he's facing so many challenges because he's growing up in poverty. This means that no matter how hard he and his family try, **it isn't adding up to success.**



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FrameWorks Application

Focused on the value of EQUITY

- Strong resonance with an Australian audience and The Smith Family's core donor.
- Strong brand equity in the "every child deserves a chance" proposition.

The value of HARD WORK

- Generally, Australians believe that *hard work should be rewarded*.
- Emotional resonance in the case of a child none of us wants to see a child trying in vain to achieve something.

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Why should poverty stop Nic achieving all he's worked for?

Like any child, Nic deserves a chance to achieve his best.

Nic' tries his hardest at school, but poverty keeps putting obstacles in the way of his learning. His parents want him to have the same opportunities as any other Australian child and do their best to support his education.

But with cost-of-living pressures mounting, especially for families already facing disadvantage, they're working longer hours than ever just to make ends meet. They don't have the time or resources to give Nic the support all children need to succeed. Despite his best efforts, Nic's falling behind at school.



Take the donor on a journey through two phases/waves.

- Illustrate the story of the child
- Connect with target audience
- Channel appropriate content and format, ensuring integration at each stage – and clarity over what role each piece plays
- Generate an emotional connection
- Clear and rational reason to give (child benefit and FIA doner benefit)
 - Express the aligned value clearly

In-Market Overview

	MAY			JUNE						
Week Commencing	24-Apr	1-May	8-May	15-May	22-May	29-May	5-Jun	12-Jun	19-Jun	26-Jun
Direct Mail Packs		Wave 1 May 1				Wave 2 2 June				
eDMs (email)		Wave 1 2 May					Wave 2 9 June			Wave 3 26 June
Telemarketing										
Corporate Donation Envelopes (ANZ)										
Press and Radio										
Outdoor Advertising										
Website Live										
Digital and Social										



Targeting and Segmentation

Standard Value

- Active
- Lapsing
- Lapsed
- Deeply Lapsed
- Confirmed GIW

Mid-Value

- Mass market
- Stewardshipsupported







Direct Response Journey

Standard

Mail Packs:

- Window face envelope
- 2-page letter with variable paras.
- 2 x Lifts
 - 1. Emotional
 - 2. Rational
- Response Mech
- Reply paid envelope

Additional Comms:

- Two waves of eDMs
- SMS follow-up
- Telemarketing to targeted supporters yet to give.



0

- (Mass) Mail Packs:
 - ail Packs: **(Stewardship)** Plain C6 envelope – hand-written address

Mid-Value

- 2-page letter with variable paragraphs.
- 2 x Lifts
 - 1. Rational (as per SV)
 - 2. Impact Report style
- Response Mech
- Reply paid envelope

Additional Comms:

- Two waves of eDMs
- Telemarketing to targeted supporters yet to give.

Additional Comms:

- One campaign eDM
- Stewardship emails
- Stewardship/thank you calling



🗲 too many barriers for a child in disadvantage.

have the resources to help them overcome these barriers so they can fulfil their potential.

Future Seekers

This interactive program

will help Nic understand

how he can apply his

interests and strengths

in his future working life.

71% of participants

report developing an

initial understanding

of the diversity of jobs.³

Thankfully, there is a proven way you can help.

Every child should have the chance to achieve their best, but children in Nic's position do not

It doesn't

add up.

Wave 1 – connect to the child – DM



Please donate today.

(Q The Smith Family) \$ 1800 024 069

No child should experience this equation:

BUT NIC* IS STILL FALLING BEHIND BECAUSE OF POVERTY.

Nic has hopes for the future, like any child - but he's facing so many challenges because he's growing up in poverty. This means that no matter how hard he and his family try, it isn't adding up to success.

How poverty is preventing Nic from achieving his best.

Like any other family, Nic's parents want him to have the chance to achieve his best, but growing cost-of-living pressures are making it harder for them to support his learning. Both parents are working longer hours to make ends meet. And because Nic steps up to care for his little sisters at night while his mum is at work, he has little time or energy for homework

access that are now crucial to learning, but unaffordable for a family in his situation

every day. And through no fault of their own, it's stopping them from achieving all they have worked for.

You can help Nic change the equation.

With your support today, Nic will be able to attend our proven out-of-school learning programs. He'll have access to an ideal environment in which to study and receive the tailored support he needs to catch up and keep up at school - so he can complete his education and go on to build a better future

Completing Year 12 (or equivalent) gives a child greater options for further study and employme



Learning Clubs

Here, Nic will receive

ongoing help with his

numeracy skills from

dedicated and skilled

76% of students agree

going to a Learning

harder at school.²

Club makes them try

volunteer tutors.







Poverty shouldn't stop Nic achieving all he's worked for.

The Smith Family

WINTER APPEAL

2023

Children growing up in disadvantage face unfair obstacles

What's more, Nic doesn't have the digital device or internet

Mid Value Impact Report Lift:

- Editorial report style (6 pages).
- Link to highly relevant issue.
- Equal weighting between problem and solution.
- Highly factual and evidence based.
- Deep dive into our most widely used & effective program.
- Lodges with Wave 1 with 'overs' available for ad hoc stewardship use.

Financial pressure is increasing for households across The impact of the Australia. rising cost of living Economic uncertainty, a lack of suitable employment opportunities, and housing affordability pressures are taking a heavy toll on many families across Australia. The rising cost of living is compounding financial pressures, and new research by the Australian National University has revealed h many households are now being affected The Household Financial Stress and The Household Financial Stress and nancial Wellbeing in Australia report uses a imprehensive new methodology to measure sancial stress. Rather than focusing only on come, it takes a wide range of factors into use and leaduration.

on education.

Education is

one of the most

Together, we can redress the educational inequality that children face as a direct result of financial disadvantage.

children remain engaged in their learning, ng them a greater chance of completing their cation to Year 12 (or equivalent).¹²

Please make your tax-deductible donation by 30 June.

Q The Smith Family 1800 024 069 2023

Our evidence-based programs are proven to

powerful agents of change.

school gates.3

Your support will ensure more Aus

can access life-changing learning s, programs such as *Learning Clubs*, s the chance every child deserves to p oals and fulfi their notestial

Research indicates there are a significant nur of factors that are the direct result of financial disadvantage, which can negatively influent student outcomes in school. These include:

children need to support effective learning. Gaps in technology and diai resources that are now esset tools for learning.

Lack of opportunity to develop skill mindsets and behaviours that are key to being a successful learner. Parents who may not have the time, skills, or resources to supp their child's learning as a result



form of financial stress.

IT HELP IS NEEDED

ssure on a family can profoundly impact a child's

How learning support helps children overcome educational inequality.

The Smith Family provides targeted support that begins early in a child's life and continues in a balanced, long-term way throughout their education, through a wide range of evidencebased learning support and mentoring programs. This approach is far more effective than concentrating support on a particular period of young people's lives and results in increases in high school graduation and university enrolments.

Each of our programs is designed to address. identified barriers that can prevent children who live with financial disadvantage from making the most of their education. For example, our Learning Clubs provide a safe. supportive, free and local out-of-school-hours nment for primary and secondary I students. This is extremely beneficia

for children who do not have access to a digita device, the internet or a suitable place to study at home - or whose parents do not have the time experience or resources to support their children with schoolwork. These clubs also help bridge a gap in communities which may have limited or

in safe extended learning experiences At a Learning Club, students can access educational resources and digital tools they may not have at home and participate in activities that develop their academic and social skills. At no co to their parents, they receive ongoing support from

skilled volunteer tutors to help them catch up, keep up, and build confidence with their schoolwork. Research by the Grattan Institute shows how crucial early intervention can be for children experiencing educational inequality – with the earning gap between children in this situation and their peers getting wider every passing year

Grattan Institute analysis of 2022 NAPI AN data



It's hard at times, seeing children in these ifficult situations, who feel like it's never goin "Going to Learning Club made such a difference to get easier. I used to be very down on mys

me. At that time school felt very hard and when I was struggling, and I see a lot of childre feeling that way. But that's the point of being a behind no matter how much effort a tutors were great, they really he stand my work, and that made me there - to help them dis apable of and show them that they're not alon home and keep studying. ly and supportive atmosphere he imfortable asking for help, which more confident in the classroom,

It's amazing to watch children getting more and more confident over time. It's not just about catching up. They also learn good study habits, like how to plan and organise their work, and the how to plan and organise their work, and that helps them become independent learner especially love working one-on-one with the tudents. The best moments are when a child loesn't understand something and you can hout the support I got from The Smith see they're frustrated - then you find the right

v I wanted to give something back, so way to explain it and it suddenly clicks for them the opportunity to volunteer at the Their happiness and excitement, the expre Club at my old school. I jumped at it. on their face when they realise they can do it that's what motivates me. It's so satisfying for Club is a great environment for me and even better for the student.

Crub is a great environment for Students have a choice about what they indig time with other children who are se boat. I think that helps with the level ment – it's optional, but we have a lot of who love it and come every week.

doing really well in my HSC and

onestly, I'm not sure I could have

through school.

versity, which is what I always

Education has been the difference between the life I could have had and the life I do have now – so having the chance to help other childrer make the most of their education makes me feel very proud. It's such a blessing."

shows the learning gap more than doubles in reading and numeracy between Year 3 and Year 9 The Grattan Institute identifies small-group tuition as "a potent fix" for the learning gap Our Learning Clubs support students to develop their confidence as learners and their literacy and numeracy skills







Wave 1 – digital



For Australian children with big dreams





Your support will make sure Nic's hard work adds up to success.



Donate today 🖡

thesmithfamily.com.au Please donate today. Not affiliated with Meta



× :

...See more



The Smith Family 😋

maths anymore." Nic, 8 years old.

"I want to be an astronaut but I'm not good at

Sponsored · 🖗

Wave 2 – push hard on known response triggers – values focused

Children don't have an equal chance when they live in poverty.

The rising cost-of-living is pulling many families deeper into poverty. This means children like Nic are falling even further behind at school and missing the chance to reach their goals.

You can help provide access to the out-of-school learning support they need to achieve their best.

Please donate by 30 June. (Q The Smith Family) \$ 1800 024 069



anaed to protect the identity of Nic and his fam



The Smith Family

APPEA 2023

It's not too late to give children in need access to crucial learning support.



Cheque Mo ease debit my: Visa Mastercard Diners American Express Card Number: na Genti Expiry Date: /



Like any child, Nic deserves a chance to achieve his best.

Nic' tries his hardest at school, but poverty keeps putting obstacles in the way of his learning. His parents want him to have the same opportunities as any other Australian child and do their best to support his education.

But with cost-of-living pressures mounting, especially for families already facing disadvantage, they're working longer hours than ever just to make ends meet. They don't have the time or resources to give Nic the support all children need to succeed. Despite his best efforts. Nic's falling behind at school

1 in 6 Australian children live in poverty.1 And for many, it's blocking their progress at school.

Children like Nic who are growing up in poverty shouldn't face barriers to learning in a country like Australia. Thankfully, there is a proven solution With early intervention and targeted out-of-school learning support, children in Nic's position can finally get an equal chance to pursue their dreams and achieve their potential





How you can help Nic build a better future.

You can ensure children in Nic's position can access our proven out-of-school learning support programs, so they can overcome the obstacles they face because of poverty and get the most from their education

All Australian children deserve the chance to do their best at school. That's why it's crucial that Nic can get life-changing support through our proven learning programs without delay, so he can build vital literacy and numeracy skills and achieve all he is capable of.

Future Seekers

This interactive and imaginative program will help Nic explore his future aspirations through career-related learning.



anding of the diversity of jobs.4

Learning Clubs Program Outcomes Summary (2021). The Smith Family.
Future Service Program Outcomes Summary (202021). The Smith Family.

Learning Clubs

Here. Nic will receive ongoing

help with his literacy and

numeracy skills from dedicated and skilled volunteer tutors.

76%

them try harder at school.



Wave 2 – digital



× :

It's not too late to help 5,528 Australian children living in disadvantage who are waiting for the support of our vital out-of-school ...See more



thesmithfamily.com.au 2023 Winter Appeal | The ... Donate now Not affiliated with Meta



The Smith

Family

Cost-of-living pressures make every day at school even harder.

Children don't have an equal chance when they live in poverty.

Donate today



Nic should have the same chance as any child to achieve his best.



Learn more







Results

The 2023 Winter was instrumental in ensuring ongoing growth within our cash appeals and maintained engagement with our core audience.

- Fundraising income:
 - Exceeded target by 20%
 - Equalled prior years record result
- Sustained post-COVID giving among existing supporters.
 - Increased response rate within core segment by 1.9%.
 - Increased giving in Mid Value by 30%
- Reversed downward trend on new donor acquisition with 14% increase in fundraising from this cohort.
- Maintained relevance and resonance within cost-ofliving suppressed environment.



Key take outs

- Make it relevant (when it REALLY is relevant)
- Put the donor first. Start with a deep human truth.
- Strengths-based *can* work but requires testing and sometimes trade-offs.
- Keep the case study at the heart. The donor cares about the story.
- Planning is key to integration.
- And integration will ALWAYS pay off.







Individual Giving Track Sponsored By:

