
Queensland University of Technology
The Australian Centre for Philanthropy
and Nonprofit Studies

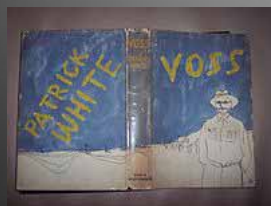
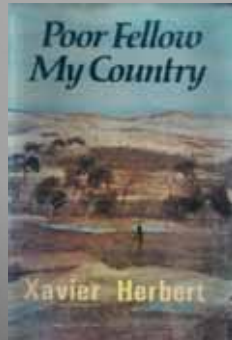
Individuals in a mass market environment: Australian bequest donors seek better communication from charities

Dr Wendy Scaife
ACPNS - QUT

JF Archibald Bequest



Miles Franklin Award



Other causes



Australia's giving culture

- ▶ *Giving Australia* (2005)
 - 86% give
 - Only 16% *plan* giving
 - Give 4x as much
 - 58% have will, 7.5% bequest
- ▶ Other dimensions
 - 5% Vic. estates include charity, giving 1% assets (Baker 2007)
 - Cf Bequest income
 - UK 30% (NCVO 2004) &
 - 10% US (Sargeant, Wymer and Hilton 2006)

Triggers and barriers?



Method



- ▶ UK/US survey refined
- ▶ Bequest officers/bequestors
- ▶ Six partner charities to random donor selection of bequestors/non-bequestors
- ▶ 1030 responses (32%)
- ▶ SPSS and NVivo

Findings

- ▶ Better communication needed
 - Only 32% satisfied
 - Half of all bequestors wanted a better bequest 'ask'
 - Like US/UK bequest pledgers specially alert (reassurance?)
 - Like US/UK mail and newsletter mentions popular

Key respondent views

- ▶ Avoid persistent, pushy requests
- ▶ Sensitivity – not guilt trip
- ▶ Recognise deeply personal nature
- ▶ Cause value/real need
- ▶ "By providing a bequest and becoming a member of the Leadership Circle in my lifetime provides me with a way of saying 'thank you' to our beautifully talented dancers who have given me so much joy over many years." *Lyn Grigg, bequestor of The Australian Ballet*



- ▶ *Your will can also act as a microphone into the future. A chance right now, to have your values heard and your beliefs represented beyond your lifespan.*

Key respondent views

- ▶ Demonstrate funds use
- ▶ *Making a bequest to The Australian Ballet is a way to do something truly memorable and create enduring benefits for the company. Bequests ensure your national ballet company will live on, enriching the lives of many Australians for generations to come.*

Finding a cure can take more than just one lifetime



RESEARCH. INSPIRATION. RESPECT.

Highlight donor benefits

- ▶ **Dorothy McLean**
- ▶ Dorothy has been a Mission Australia supporter for over 45 years witnessing the poverty in the Woolloomooloo area back in the 1960's. Dorothy decided to do something to help disadvantaged people and has continued to donate ever since. Dorothy saw leaving a gift in her Will as just a natural extension of the support she had been providing throughout her lifetime.
- ▶ "When I am no longer around, I want to be able to continue to help those in need."
Dorothy

Changes to the tax legislation governing gifts and bequests are favourable to donors and should be discussed with your tax adviser or lawyer. The Gallery's Benefaction Manager is available to discuss any proposed gift or bequest and to explain the various options. The Gallery, in appreciation of donors' generosity, will offer appropriate acknowledgement. In the case of pledged bequests, donors will be offered honorary membership of the [Foundation](#).



Process info and help

Australian Ballet Bequest code of conduct

The Australian Ballet has developed a code of conduct to guide its Bequest Programme:

- We are committed to the highest standards of professionalism and adhere to working principles that accord donors courteous treatment, respect and truthful communication.
- Serving the best interest of the donor is a primary concern. No gift will be considered if the financial interest of the donor is compromised.
- We shall seek the advice of legal counsel in matters pertaining to our Bequest Programme and shall require the assent of legal counsel before finalising any gifts other than a standard insured bequest agreement.
- All prospective bequestors shall be advised to seek the counsel of their own solicitor, accountant or tax adviser concerning their proposed gifts.
- All information concerning bequestors, including their names, the names of beneficiaries, the amount of gifts, size of estate and so on, shall be kept confidential by The Australian Ballet unless permission is obtained to release such information.
- Only officers who are authorised to execute corporate documents on behalf of The Australian Ballet shall sign an agreement.
- When real property is involved in an agreement, the agreement must be submitted to the Board of The Australian Ballet for approval and acceptance.
- Owing to the cost of administrative processes, five hundred dollars is the minimum value of a bequest that can be accepted.
- All matters pertaining to the investment of bequest funds shall be under the control and supervision of The Australian Ballet's Board, except where an independent trustee has been nominated.

Assist process

If you die without leaving a will, the state will distribute your property according to its laws, not your wishes.

Clearly, having a will is vital. That's why **GREENPEACE** has published a clear, concise guide on the subject. We can help you ensure your money goes to the people you love and the organisations you believe in.

For your free copy, **simply call 1 800 81 51 51**, or write to, Greenpeace Australia, PO Box 800, Surry Hills NSW 2010

**Lift community awareness
- beer mat**

