Gifts in Wills Health Check Report

An independent assessment of Gifts in Wills maturity, strengths and growth opportunities at **Ripple Effect Foundation.**



> *The true meaning of life is to plant trees, under whose shade you do not expect to sit.*
>
> NELSON MANDELA

Prepared by:

Future Impact COLLECTIVE

INDEPENDENT ASSESSMENT

PRACTICAL STRATEGIES

SUSTAINABLE GROWTH

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EXECUTIVE DASHBOARD

Program Health Score

84
/100

Maturity Stage

ADVANCED



Assessment Confidence



HIGH

KEY STRENGTHS

✓ Critical priority with strong leadership support
✓ Dedicated program lead and established strategy
✓ Comprehensive resources and online Will pathway
✓ Salesforce manages a substantial supporter pipeline
✓ Documented stewardship and formal Bequest Society
✓ Regular reporting and estate administration experience

STRATEGIC PRIORITIES

1. Stewardship & Supporter Engagement
2. Measurement, Impact & Reporting
3. Supporter Insights & Promotion

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ORGANISATION OVERVIEW

Ripple Effect Foundation is the community services organisation, supporting individuals, families and communities across housing, homelessness, emergency relief, mental health, family services, early learning, employment and alcohol and other drug services.

Its Gifts in Wills program is assessed at the **Advanced** stage, with a Program Health Score of **84 out of 100**.

Strong leadership and Board support, dedicated ownership, an established strategy, comprehensive supporter resources, Salesforce tracking, documented stewardship and regular reporting provide substantial foundations. The next opportunity is to strengthen personalised stewardship, impact measurement and promotion using supporter insights.



Focus
Community and social services



Supporters
10,000–25,000



Fundraising Team
More than 10 staff

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WHY GIFTS IN WILLS MATTER

Gifts in Wills represent a significant long-term funding opportunity for charities, helping organisations build sustainability while enabling supporters to create lasting impact beyond their lifetime.

Australia and New Zealand are experiencing one of the largest intergenerational wealth transfers in history, creating a valuable opportunity for organisations that engage supporters in meaningful legacy conversations.

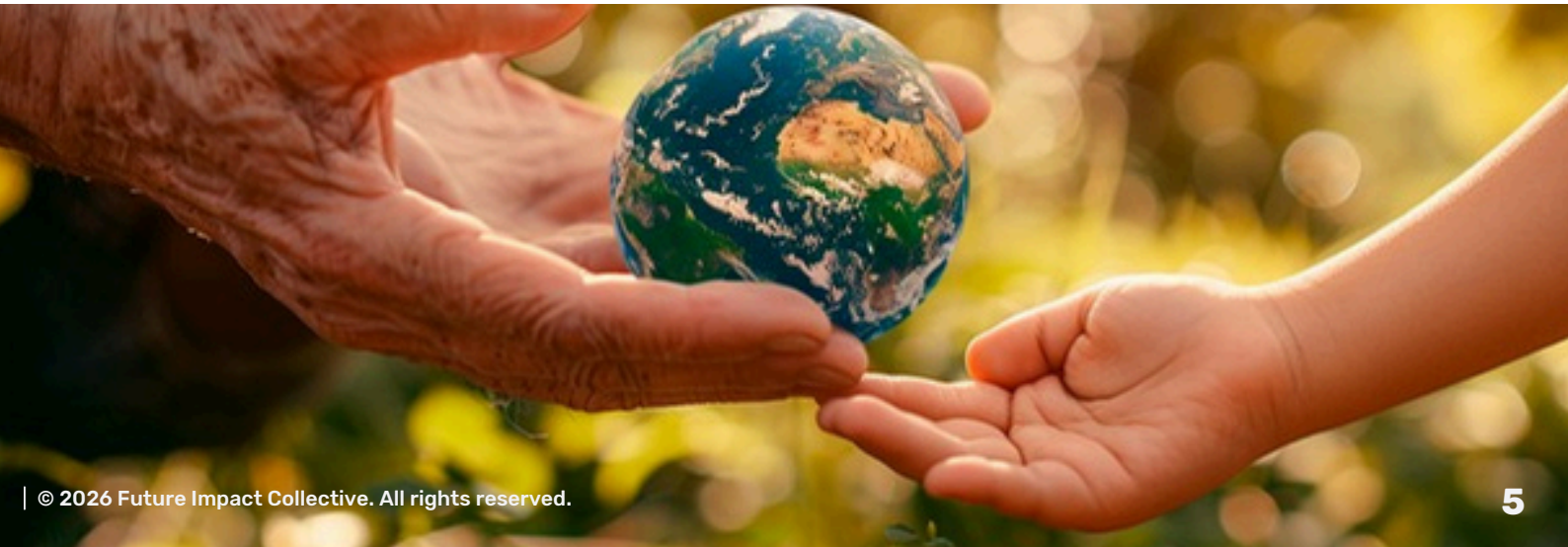
$5.4 TRILLION

estimated to transfer between generations over the next 20 years.

Source: JBWere, The Bequest Report (2024)

> *A charitable bequest is one of the clearest expressions of personal values and is often the largest gift a donor will ever make.*

Source: Russell James, *Global authority on charitable gift planning and donor psychology*



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SECTOR INSIGHTS



Insights from sector research provide valuable context for building sustainable Gifts in Wills programs.

Insight 1:

Legacy Builds Slowly

Successful Gifts in Wills programs are built over years, not months. Consistent visibility, supporter engagement and stewardship help create the trust and familiarity that often precede a Gifts in Wills decision.

Source: Legacy Futures

Insight 2:

Visibility Matters

Supporters are unlikely to act on opportunities they do not regularly see. Research suggests Gifts in Wills decisions often develop over many years and are influenced by multiple touchpoints, conversations and life events before action is taken.

Source: Include a Charity

Insight 3:

Legacy Deepens Support

Research suggests supporters who leave Gifts in Wills often continue supporting organisations during their lifetime. Rather than replacing current giving, legacy giving is frequently an extension of an existing relationship and commitment to a cause.

Source: Russell James; Legacy Futures; Include a Charity

Insight 4:

Stewardship Is Essential

Supporters who feel valued, respected and connected are more likely to maintain long-term relationships and legacy intentions. Consistent stewardship helps strengthen trust and reinforces confidence in an organisation's future impact.

Source: F&P / Bluefrog, From Entry to Exit (2024); Legacy Futures

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GIFTS IN WILLS MATURITY LEVEL

Program Health Score

84
/100

Maturity Stage

ADVANCED

Assessment Confidence

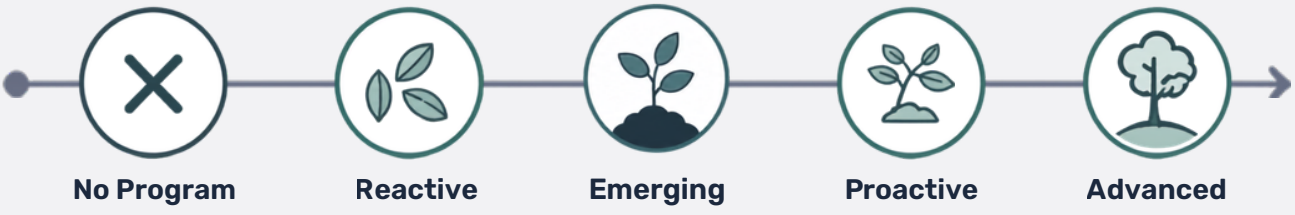
HIGH

WHAT THIS MEANS

An Advanced Gifts in Wills program is embedded across organisational systems, supported by strong leadership, processes, stewardship and measurement.

Ripple Effect Foundation demonstrates strategic commitment, dedicated ownership, comprehensive resources, a Salesforce pipeline, documented stewardship and regular reporting.

The opportunity is to optimise these foundations through personalised engagement, stronger impact measurement and insight-led promotion.



See Appendix A for definitions of all maturity levels

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PROGRAM HEALTH SCORE BREAKDOWN

Program Health Score



Maturity Stage

ADVANCED



Ripple Effect Foundation's Program Health Score reflects established capability across key areas, with opportunities to strengthen consistency, supporter pathways and year-round visibility.



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HEALTH CHECK FINDINGS

This assessment highlights Ripple Effect Foundation's Gifts in Wills foundations and priority opportunities for growth.



CURRENT PROGRAM STRENGTHS

✓ Gifts in Wills is a critical priority.

✓ Strong support exists across leadership, management and the Board.

✓ A dedicated program lead and strategy exist.

✓ Comprehensive supporter resources support consideration.

✓ Salesforce supports pipeline and relationship tracking.

✓ Enquiry and stewardship processes are documented.

✓ A formal Bequest Society recognises supporters.

✓ Regular reporting supports program oversight.

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HEALTH CHECK FINDINGS

This assessment highlights Ripple Effect Foundation's Gifts in Wills foundations and priority opportunities for growth.

Maturity Stage
ADVANCED



OPPORTUNITIES FOR DEVELOPMENT

✓ Increase stewardship beyond annual communications.

✓ Personalise engagement across supporter journey stages.

✓ Strengthen Board reporting and impact measurement.

✓ Use channel performance to guide promotion.

✓ Apply supporter insights to future engagement.

✓ Protect continuity through capacity and succession planning.

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OPPORTUNITIES FOR DEVELOPMENT → STRATEGIC PRIORITIES

Targeted improvements could help Ripple Effect Foundation optimise its established Gifts in Wills program and deepen long-term supporter engagement.

Opportunity 1: Stewardship & Supporter Engagement	Develop a more personalised stewardship approach across supporter stages, with regular, relevant engagement beyond annual communications.
Opportunity 2: Measurement, Impact & Reporting	Track enquiries, supporter progression, stewardship activity and realised gifts through a regular dashboard, with key insights reported to leadership and the Board.
Opportunity 3: Supporter Insights & Promotion	Use supporter feedback, CRM insights and channel performance to refine messaging, target audiences and shape future Gifts in Wills promotion.

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12-MONTH GIFTS IN WILLS ROADMAP

A phased approach to deepen supporter relationships, strengthen measurement and guide more effective promotion.



0-3 MONTHS

REVIEW

- Map current stewardship across supporter stages
- Confirm priority measures and reporting responsibilities
- Review existing communications and channel performance
- Identify key supporter insight gaps

3-6 MONTHS

IMPLEMENT

- Introduce more regular, segmented stewardship
- Develop a practical performance dashboard
- Strengthen leadership and Board reporting
- Launch a dedicated Gifts in Wills supporter survey

6-12 MONTHS

GROW

- Review engagement and pipeline progression
- Refine stewardship using supporter feedback
- Apply survey insights to promotional planning
- Test and improve promotional messaging

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HOW WE CAN HELP

Core Service: Gifts in Wills Accelerator Kit

The Accelerator Kit provides practical resources and a guided implementation pathway designed around Ripple Effect Foundation's existing activity, priorities and capacity.

INVESTMENT

$999 + GST

View Accelerator Kit example

Kit Resource	Description	Why it's recommended
WEBPAGE REVIEW	Review existing webpage against Gifts in Wills best practice.	Strengthen supporter pathways, CTAs and solicitor information.
SUPPORTER GUIDE	Supporter resource covering impact, gift options and next steps.	Supports private consideration and conversations with solicitors.
STAFF TOOLKIT	Guidance, FAQs, responsibilities and internal referral pathways.	Support consistent responses, responsibilities and referral pathways across teams.
CRM & STEWARDSHIP	GiW supporter stages, tracking guidance and practical stewardship processes.	Use existing Salesforce capability to embed consistent follow-up, stewardship and reporting.
COMMUNICATIONS CALENDAR	12-month calendar with customisable Gifts in Wills promotional content.	Build on existing newsletters with consistent, low-workload promotion.
GUIDED IMPLEMENTATION ROADMAP	Prioritised actions, responsibilities, sequencing and timeframes.	Provide a realistic pathway aligned with team capacity.

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HOW WE CAN HELP

Strategic Support: Supporter Survey Development

Develop a tailored Gifts in Wills supporter survey to better understand awareness, motivations, communication preferences and future intentions across Ripple Effect Foundation's supporter community.

Dedicated Gifts in Wills Survey

INVESTMENT
$695* + GST

What's included:

✓ Tailored survey design, questions and supporter messaging
✓ Distribution guidance and data collection framework
✓ Results summary template and recommended follow-up actions
✓ Practical implementation guidance

Why it's recommended:

Build on Ripple Effect Foundation's broader supporter survey with a dedicated Gifts in Wills survey to identify prospects and guide targeted stewardship and communications.

*** PRICE SHOWN IS FOR SURVEY DEVELOPMENT ONLY.**

Survey development plus analysis of up to 500 responses, key findings, prospect indicators and tailored recommendations is available

INVESTMENT
$1,095 + GST

Please note: *These recommendations have been tailored to Ripple Effect Foundation's current needs and priorities.*

Explore all Strategic Support Services

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HOW WE CAN HELP

Strategic Support: Workshops

Practical workshops, facilitated by expert Gifts in Wills practitioners, designed around your organisation's priorities, capacity and stage of development.

Campaign Planning & Awareness Workshop

INVESTMENT
$995 + GST

Build a focused Gifts in Wills communications plan using supporter survey findings, CRM insights and existing channel performance.

What's included:

✓ 90-minute workshop facilitated by a sector expert
✓ Review of existing Gifts in Wills communications and activities
✓ Interpretation of supporter and channel insights
✓ Annual planning, campaign themes and new awareness opportunities
✓ Practical implementation actions and follow-up recommendations

Why it's recommended:

This workshop would help Ripple Effect Foundation translate supporter insights into targeted, evidence-led Gifts in Wills promotion across its existing communications channels.

Please note: *These recommendations have been tailored to Ripple Effect Foundation's current needs and priorities.*

Explore all Strategic Support Services

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CONCLUSION

Ripple Effect Foundation has established a highly developed Gifts in Wills program, supported by strong leadership, dedicated ownership, comprehensive supporter resources, Salesforce tracking and regular reporting.

Its documented stewardship approach, formal Bequest Society and significant supporter pipeline provide a strong platform for continued development.

The next opportunity is to deepen engagement through more regular and personalised stewardship, strengthen impact measurement and use supporter insights to guide future promotion.

A dedicated Gifts in Wills survey would build on Ripple Effect Foundation's broader supporter research and provide valuable evidence to shape communications, identify prospects and refine supporter journeys.

By connecting these insights with existing systems and capability, Ripple Effect Foundation will be well positioned to strengthen long-term relationships and help supporters create lasting impact across Victoria and Tasmania.

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5 August 2026

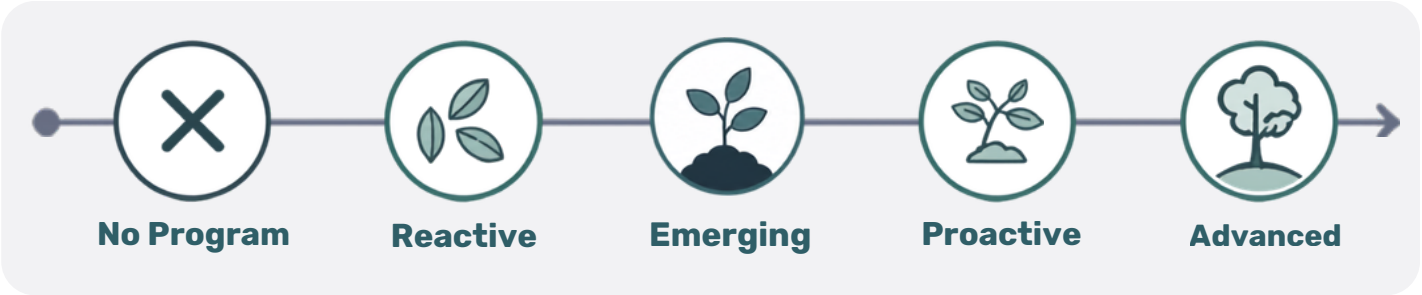
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APPENDIX A

MATURITY STAGE DEFINITIONS

The Future Impact Collective maturity model provides a framework for understanding Gifts in Wills capability and identifying opportunities for growth.



NO PROGRAM
Foundations not yet established.

No meaningful Gifts in Wills activity, infrastructure, ownership, supporter journey or tracking is currently in place.

REACTIVE
Responding rather than planning.

The organisation responds to enquiries or gifts when they arise, but activity is largely informal, inconsistent or opportunistic.

EMERGING
Building the foundations.

Some promotion, stewardship, ownership or tracking may be in place, but consistency, structure and supporter pathways are still developing.

PROACTIVE
Structured and growing.

A defined Gifts in Wills program is operating with active promotion, documented supporter journeys, CRM tracking, stewardship and reporting.

ADVANCED
Embedded and optimised.

Gifts in Wills is integrated across the organisation with strong leadership engagement, sophisticated stewardship, regular reporting and continuous improvement.

PROGRAM HEALTH SCORE GUIDE

A Program Health Score provides an indication of current Gifts in Wills maturity and capability across strategy, promotion, supporter pathways, stewardship, systems and reporting.

No Program	Reactive	Emerging	Proactive	Advanced
0-10	11-40	41-60	61-80	81 - 100

IMPORTANT NOTE

Organisations progress through maturity stages at different rates. The purpose of this model is to help identify practical next steps for sustainable growth.

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