

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:



INDEPENDENT
ASSESSMENT



PRACTICAL
STRATEGIES



SUSTAINABLE
GROWTH



EXECUTIVE DASHBOARD

Program Health Score



Maturity Stage



PROACTIVE

Assessment Confidence



HIGH

KEY STRENGTHS

- ✓ Leadership & board support
- ✓ Established GIW resources
- ✓ Previous GIW outcomes
- ✓ High internal capability
- ✓ Compelling family-centred mission

TOP PRIORITY ACTIONS

- 1 Strengthen CRM tracking & reporting
- 2 Formalise supporter stewardship
- 3 Increase ongoing Gifts in Wills visibility

“ Gifts in Wills remains one of the highest-return fundraising opportunities available to charities, yet remain one of the least understood sources of future income. ”

Source: JBWere, The Bequest Report (2024)

ORGANISATION OVERVIEW

Ripple Effect Foundation is a Queensland charity providing practical accommodation, transport and family support services for children undergoing cancer treatment and their families.

The organisation has an established fundraising program, a dedicated supporter community and a small team responsible for philanthropy and Gifts in Wills alongside broader fundraising priorities.

Gifts in Wills has been identified as an important long-term fundraising priority, with strong leadership, management and board support already in place. The organisation has developed key supporter resources and has received previous Gifts in Wills, providing a solid foundation for future growth.



Focus

Supporting children with cancer and their families.



Supporters

Approx. 100 – 500 people



Team

Small paid team, wider volunteer community

EXECUTIVE SUMMARY

Ripple Effect Foundation has established a strong foundation for a sustainable Gifts in Wills program, with leadership support, established supporter resources and evidence of previous Gifts in Wills enquiries and realised gifts.

The current assessment places Ripple Effect Foundation within the **Proactive maturity stage**, with a **Program Health Score of 5 out of 100**.

Key strengths include leadership commitment, high internal confidence, established Gifts in Wills resources and a compelling mission that naturally supports legacy giving.

The greatest opportunities now lie in strengthening CRM tracking, structured stewardship, documented supporter processes and ongoing communications to increase awareness.

The organisation has already established many of the foundations of a successful Gifts in Wills program. The next stage is to improve operational consistency through practical systems that support identification, stewardship and long-term pipeline growth.



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)

For Ripple Effect Foundation, this opportunity aligns naturally with the organisation's commitment to ensuring families facing childhood cancer receive practical care and support when they need it most. A Gift in Will allows supporters to extend that care to future generations of children and families.

“

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

MATURITY LEVEL

PROACTIVE

Program Health Score

61 /100

Assessment Confidence

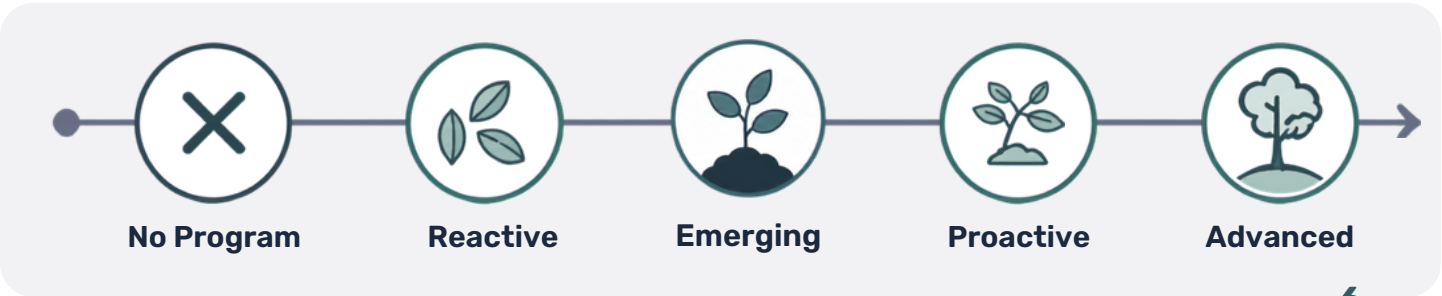
HIGH

WHAT THIS MEANS

A **PROACTIVE** Gifts in Wills program has progressed beyond purely reactive activity. Ripple Effect Foundation has strong leadership support, established Gifts in Wills resources, previous realised gifts and staff with the confidence to discuss Gifts in Wills with supporters.

However, the program is not yet fully structured. Important operational foundations, including documented enquiry processes, CRM pipeline tracking, structured stewardship and regular supporter promotion, have not yet been consistently implemented.

This is an encouraging position. Ripple Effect Foundation already has many of the building blocks required for long-term success. By strengthening a small number of systems and processes, the organisation is well placed to develop a more proactive and sustainable Gifts in Wills program.



ASSESSMENT RATIONALE

The following assessment summarises Ripple Effect Foundation's current Gifts in Wills program, highlighting the strong foundations already in place and the practical opportunities to strengthen long-term program performance.

Maturity Stage



Proactive

- ✓ Gifts in Wills is recognised as an important fundraising priority.
- ✓ Strong leadership, management and board support.
- ✓ Dedicated Gifts in Wills webpage and supporter brochure.
- ✓ Online Will pathway and suggested bequest wording available.
- ✓ Previous Gifts in Wills enquiries and realised gifts.
- ✓ High staff confidence discussing Gifts in Wills.
- ✓ Strong confidence managing estate administration.
- ✓ Some known prospective and confirmed Gifts in Wills supporters.
- ✓ No dedicated Gifts in Wills CRM register or pipeline.
- ✓ No documented enquiry or stewardship process.
- ✓ Limited ongoing Gifts in Wills promotion and reporting.

See Appendix A for definitions of all maturity levels

WHY WE AWARDED THIS SCORE

Gifts in Wills Health Score



Ripple Effect Foundation has established a proactive Gifts in Wills program with strong leadership commitment, quality supporter resources and evidence of existing Gifts in Wills activity.

The greatest opportunities for future growth lie in strengthening CRM management, structured stewardship, ongoing promotion and program reporting.

Maturity Stage



Proactive



KEY STRENGTHS

Ripple Effect Foundation has established several important foundations that position the organisation well for future Gifts in Wills growth.



Leadership Commitment

Gifts in Wills is recognised as an important long-term fundraising priority with strong support from leadership, management and the Board.



Established Supporter Resources

A dedicated Gifts in Wills webpage, brochure, suggested wording and online Will option already provide supporters with multiple ways to learn more and take action.



Proven Supporter Interest

The organisation has received Gifts in Wills enquiries, has known prospective and confirmed supporters, and has previously received realised Gifts in Wills.



High Internal Confidence

Staff report strong confidence discussing Gifts in Wills and managing estate administration, providing an excellent platform for future growth.



Compelling Mission

Supporting families through childhood cancer creates an authentic and emotionally powerful case for legacy giving that naturally aligns with supporters' desire to create lasting impact.

OPPORTUNITIES FOR DEVELOPMENT

Targeted improvements in a few key areas could significantly strengthen long-term program performance.

Opportunity 1: **CRM Tracking & Pipeline**

Creating a dedicated Gifts in Wills pipeline within Chilli DB would improve supporter visibility, stewardship and reporting while reducing reliance on individual knowledge.

Opportunity 2: **Enquiry & Stewardship Process**

A documented enquiry and follow-up process would ensure every supporter receives a consistent, timely and personalised experience.

Opportunity 3: **Increase Visibility**

Regular, gentle promotion through newsletters, donor updates, annual reports and supporter communications would increase awareness over time.

Opportunity 4: **Structured Stewardship**

Developing a simple stewardship journey for enquirers, intending supporters and confirmed Gifts in Wills supporters would strengthen long-term relationships.

Opportunity 5: **Reporting & Measurement**

Introducing simple Gifts in Wills reporting metrics would improve visibility, inform decision-making and support future program development.

SECTOR INSIGHTS

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



Insight 1:

Long-Term Focus

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 Giving Complements Giving

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 Drives Growth

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

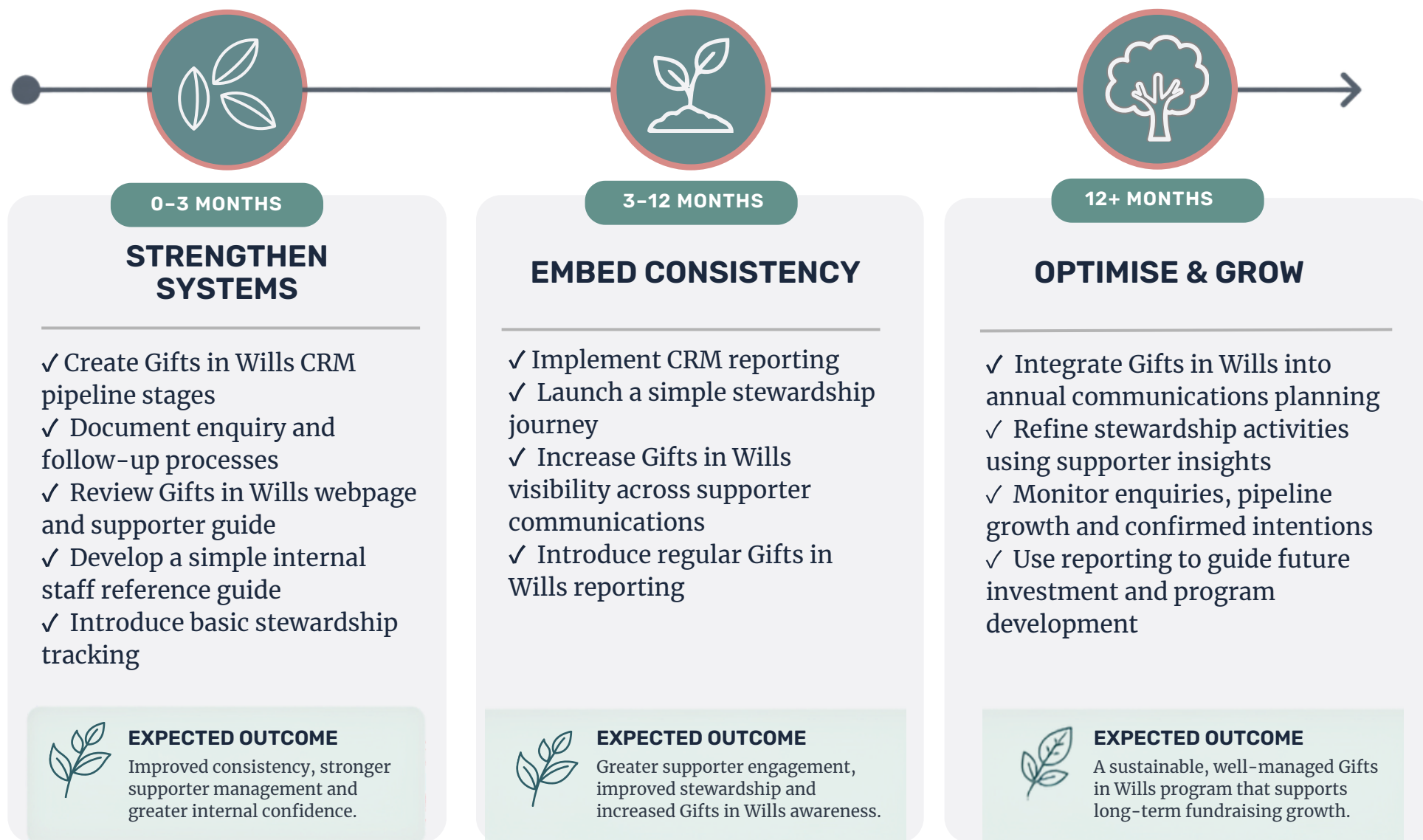
BENCHMARKING & BEST PRACTICE

Best practice comparisons highlight where existing activity aligns with sector leaders and where opportunities remain.

Area	Current Position	Best Practice Opportunity
Strategy	Strong leadership commitment and organisational support.	Develop a simple annual Gifts in Wills action plan.
Promotion	Dedicated webpage and brochure available.	Increase ongoing visibility through regular supporter communications.
Supporter Pathway	Enquiries managed informally.	Document enquiry handling and stewardship processes.
Systems & Tracking	Chilli DB used but no Gifts in Wills pipeline.	Implement dedicated pipeline stages and reporting.
Stewardship	Some personalised communications.	Develop structured stewardship for each supporter stage.
Reporting	General reporting only.	Introduce Gifts in Wills-specific KPIs and reporting metrics.

12-MONTH GIFTS IN WILLS ROADMAP

A phased approach to build strong foundations, embed good systems and grow Gifts in Wills activity for long-term impact.



HOW WE CAN HELP

Core Service: Gifts in Wills Accelerator Kit

Ripple Effect Foundation has already established many of the foundations of a successful Gifts in Wills program. The assessment identified the greatest opportunities in strengthening systems, supporter journeys and operational consistency. materials.

- **All elements of the Accelerator Kit are tailored to your organisation** based on your current capacity and Gifts in Wills maturity.
- Template content is designed for organisations to implement and customise internally.
- Additional customisation services are available for organisations seeking fully tailored supporter-facing materials.



INVESTMENT

\$799 + GST

GIW Accelerator Kit Element	Description	Why it's recommended
GIW WEBPAGE REVIEW	Review and refine the existing Gifts in Wills webpage using current best practice.	Improve supporter journeys, calls to action and ongoing conversion from existing traffic.
GIW SUPPORTER GUIDE REVIEW	Review the existing brochure to strengthen messaging, structure and supporter experience.	Ensure the guide reflects CCS's impact story and supports consistent follow-up conversations.
STAFF TOOLKIT	Practical conversation guide, FAQs and internal reference resources for staff.	Maintain high staff confidence and ensure consistent supporter conversations across the organisation.
CRM & STEWARDSHIP FRAMEWORK	Gifts in Wills pipeline stages, CRM recommendations and stewardship framework.	The highest priority identified through the assessment to improve tracking, stewardship and reporting.
TAILORED IMPLEMENTATION ROADMAP	Practical implementation plan prioritised for CCS's current maturity and capacity.	Provides a realistic roadmap that builds on existing strengths without overwhelming the team.

HOW WE CAN HELP

Optional Customisation & Add-Ons

Enhance your Gifts in Wills program with tailored resources and communications designed to engage supporters and strengthen long-term stewardship.

Gifts in Wills Webpage Review & Customisation



INVESTMENT

\$499 + GST

What's Included

- ✓ Fully customised content
- ✓ Tailored impact messaging
- ✓ FAQs, CTA's & supporter stories
- ✓ Online Will integration
- ✓ Embedded enquiry form
- ✓ Image sourcing (if required)
- ✓ Ready-to-import webpage file

Examples

[Life Education](#)

[Global Concern](#)

Gifts in Wills Supporter Guide Review & Customisation



INVESTMENT

\$399 + GST

What's Included

- ✓ Fully customised content
- ✓ Organisation branding
- ✓ Tailored impact messaging
- ✓ Online Will integration
- ✓ Legal wording & gift types
- ✓ Image sourcing (if required)
- ✓ Ready-to-print design file

Examples

[Terra Nova](#)

[Global Concern](#)

GIFTS IN WILLS ACCELERATOR BUNDLE



Accelerator Kit

Establish the foundations, systems and supporter resources to launch and grow your program.

Webpage Customisation

A tailored webpage that brings your impact story to life and guides supporters with clarity and confidence.

Supporter Guide Customisation

A fully customised Gifts in Wills guide to support conversations, enquiries and supporter decision-making.

Stewardship Pack

A suite of communications to thank, inform and strengthen relationships with Gifts in Wills supporters.



INVESTMENT

\$1399⁺ GST



HOW WE CAN HELP

Optional Customisation & Add-Ons

Enhance your Gifts in Wills program with tailored resources and communications designed to engage supporters and strengthen long-term stewardship.

Stewardship Communication Pack

What's Included

Customisable templates for:

- ✓ Thank you letters
- ✓ Welcome communications
- ✓ Stewardship updates
- ✓ Anniversary acknowledgements
- ✓ General supporter communications
- ✓ Editable Word templates
- ✓ Implementation guidance



INVESTMENT

\$449+ GST

Why this may be valuable

Ripple Effect Foundation already has known prospective and confirmed Gifts in Wills supporters.

A tailored Stewardship Communication Pack would help build stronger long-term relationships through consistent, meaningful communications while reducing the time required to create supporter updates from scratch.

Supporter Survey Development

What's Included

- ✓ Survey design & questions
- ✓ Tailored messaging
- ✓ Distribution guidance
- ✓ Data collection framework
- ✓ Results summary template
- ✓ Recommended follow-up actions
- ✓ Implementation guidance



INVESTMENT

\$449+ GST

Why this may be valuable

A supporter survey can help Ripple Effect Foundation better understand awareness, motivations and interest in Gifts in Wills across its existing supporter base.

These insights can inform future communications, stewardship activities and long-term program planning while helping identify potential Gifts in Wills supporters.

HOW WE CAN HELP

Optional Customisation & Add-Ons

Enhance your Gifts in Wills program with tailored resources and communications designed to engage supporters and strengthen long-term stewardship.

Campaign Planning Workshop



INVESTMENT
\$995+ GST

What's Included

- ✓ 90-minute facilitated workshop
- ✓ Annual communications planning
- ✓ Campaign themes & messaging
- ✓ Promotion calendar
- ✓ Awareness opportunities
- ✓ Practical implementation actions
- ✓ Follow-up recommendations

Why this may be valuable

The assessment identified ongoing visibility as one of the greatest opportunities for growth.

This workshop would help Ripple Effect Foundation develop a practical communications plan that integrates Gifts in Wills into existing fundraising activities in a respectful, sustainable and achievable way.



PRACTICAL & ACTION- FOCUSED

Turn ideas into action with practical resources.



BUILT FOR SMALL TEAMS

Created for organisations with limited time and capacity.



TRUSTED & SECTOR ALIGNED

Built on sector research, benchmarking and best practice.



STRONG FOUNDATIONS FOR GROWTH

Build confidence, consistency and future readiness.



ACCESSIBLE & AFFORDABLE

An affordable pathway to a sustainable program.

CONCLUSION

Ripple Effect Foundation has established a strong early platform for Gifts in Wills growth.

The organisation has leadership support, a compelling mission, public-facing resources, internal confidence and evidence that supporters have already considered or made Gifts in Wills. These are meaningful strengths.

The opportunity now is to strengthen consistency across the program. By enhancing CRM tracking, stewardship, reporting and supporter communications, Ripple Effect Foundation can continue building a more mature, measurable and sustainable Gifts in Wills program.

With practical systems in place, Ripple Effect Foundation will be better positioned to identify, support and steward the people who want their care for families impacted by childhood cancer to continue well into the future.

Prepared by

Lucy McMorron, Founder & Principal Consultant

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 - 20	21 - 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.

GIFTS IN WILLS LIFECYCLE

Supporters typically move through a series of stages before a bequest is realised. Understanding these stages helps organisations engage meaningfully and steward supporters at the right time.



AWARENESS

Supporter becomes aware of Gifts in Wills and the impact they can create.

Awareness may come through communications, conversations, events, campaigns or third parties. The supporter is not yet actively considering a bequest.



ENQUIRER

Supporter seeks more information about leaving a gift in their Will.

The supporter makes contact or requests information. They are exploring their options and want to understand how a bequest could work.



CONSIDERER

Supporter is considered including the organisation in their Will.

The supporter is weighing options, reflecting on their values and thinking about the impact they want to leave. This may take months or years.



INTENDER

Supporter has decided to include a gift in their Will.

The supporter has taken action to include the organisation in their Will, but has not yet formally advised the organisation. This is a vital and growing stage in the pipeline.



CONFIRMED

Supporter informs the organisation of their bequest intention.

The supporter lets the organisation know they have included a gift in their Will. This enables deeper stewardship and helps the organisation plan for the future.



REALISED

The bequest is received after the supporter's lifetime.

The gift is realised through the supporter's estate. This is the outcome of a long-term relationship built on trust, impact and shared values.

IMPORTANT NOTE

Supporters may move through these stages at different times and in different ways. The role of the organisation is to provide the right information, at the right time, with care and respect.