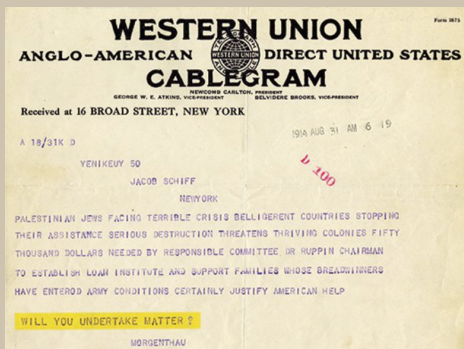




CASE STUDY

GIFTS IN WILLS PROGRAM

The goal: attract new significant revenue from gifts in wills



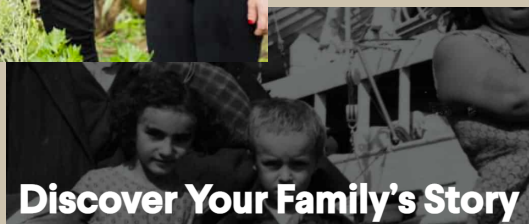
The Joint Australia commenced operations in Australia September 2012 as the first official branch of the global American Jewish Joint Distribution Committee ("The Joint") outside Israel and North America. It raises funds to support the ongoing mission of rescue, relief and renewal of Jewish life across the globe.

Catalyst Management was engaged to guide the development of a Gifts in Wills strategy and plan with The Joint's CEO, President and Board members.

After research, data analysis and a review of the Australian and US fundraising operations, a strategy and plan was co-developed covering these elements:

1. Program objectives.
2. Stakeholders' involvement (Board, office holders, etc)
3. Integration with existing activities.
4. Prospecting amongst existing supporters, identifying new supporters.
5. Developing the case for support.
6. Cultivation, solicitation and stewardship system.
7. Marketing and communications plan.
8. Effective administration of estate gifts.
9. Budget and resourcing.

The project was completed with a workshop for Board and CEO to set them on the implementation path for the strategy.



Discover Your Family's Story



Dr Philip Bos
Executive Director

“It was part of our key strategy for future sustainability to research and establish a planned giving program, with a focus initially on gifts in wills. Lawrence Jackson and the Catalyst Management team provided us with expert counsel and guidance to establish a gifts in wills program, as well as a workshop to get us started. Their assistance was timely, relevant and gave us a wealth of information, tactics and helpful guidance to work with. This now enables our organisation to attract new revenue and build a sustainable future.”

click to
watch



CONTACT

Lawrence Jackson
Juliana Payne

ljackson@catalystmanagement.com.au
jpayne@catalystmanagement.com.au