

HOW TO GUIDE

Legacies



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Editor's message



Stephen Cotterill

Welcome to the second full edition of the How to Guide series produced by Civil Society Media and Fundraising Magazine.

Legacies are entering a boom period as baby boomers look to transfer their wealth to future generations presenting an opportunity for charities to secure a spot in their wills. But how can charities do this? Especially small charities might be daunted by the prospect of launching a legacy campaign or hesitant to broach the subject with their supporters. And how do you get buy-in for senior-level support for resources when return on investment is unlikely to be seen for many years in the future?

Luckily, there is an armoury of tools available for charities of all sizes to steer their legacy programme onto the right path. From digital channels and enhanced storytelling to free will-writing services, there is range of approaches that charities can adopt to get the conversation started when it comes to leaving a gift for causes close to your supporters' hearts.

One invaluable resource is the experience of those who have already gone on this journey and are willing to share their experiences. This guide includes case studies and guidance from big charities such as NSPCC with well-established legacy strategies to smaller organisations such as Bees Abroad which built its own programme from scratch.

With this knowledge you are better equipped to take the next steps in your legacy journey, helping your supporters understand the importance of gifts in wills as well as convincing your board and senior management team of the long-term benefits of a well-resourced, well-planned legacy strategy.

How to Guide **Legacies**

This is the second volume of several publications gathering expert insight and real-life case studies on a range of professional fundraising specialisms including major donor giving, trust and foundation grant applications, digital fundraising and many more.

This edition takes a deep dive into the world of legacy giving and how your organisation can engage your supporters to think about leaving a gift in their will to support your cause.

How to Guide – Legacies includes:

- Insight into getting buy-in for legacies across your organisation
- Top tips on adapting a legacy programme in line with changing consumer behaviour
- Creating a legacy plan from scratch at a small charity
- Guidance on how to talk to supporters about legacy giving

This edition includes case studies from:

- NSPCC
- RSPB
- Bees Abroad
- WaterAid
- Brooke

How to Guide – Legacies is the second in a series of books packed with useful information curated from Fundraising Magazine and civilsociety.co.uk

Upcoming editions will focus on individual channels, including:

- Digital fundraising
- Trusts and foundations
- Corporate partnerships
- Face-to-face fundraising

A boom time for **legacies**



Poised on the edge of one of the largest inter-generational transfer of wealth in modern history, legacy fundraisers have a great opportunity to engage their supporters about leaving a gift in their will

As baby boomers near the end of life, the next few decades are set to spur the largest inter-generational transfer of wealth we have ever seen.

Predictions from Legacy Foresight suggest that the legacy market could be worth upwards of £6bn by 2050.

And they are already on an upward trend. Charities' legacy income in England and Wales increased to a record high of £3.9bn last year, according to Smee & Ford's latest Legacy Trends Report. It recorded 38,178 charitable estates in wills in 2023, the highest level since it started tracking sector data in 2012. The legacy data analysis firm found that the total value of charitable estates rose by £1.2bn to £22.6bn, a growth of 7%. This, the report says, is the second time values have exceeded £20bn.

Long-term positive shift

There has also been an incremental rise in charitable donors writing wills and pledging gifts to charities, according to Remember A Charity's annual consumer tracking index. Almost two thirds (64%) of charity donors have written a will, up from 63% in 2022 and 62% in 2021.

Of those with a will in place, almost one third (31%) have included a legacy donation, up from 29% in 2022. The study looks at figures from 2023, and found that rates are highest among

those who are affluent, aware of the inheritance tax incentives, and those who have sought professional advice for their finances.

Lucinda Frostick, director of Remember A Charity, says: "This study shows the long-term positive shift in legacy giving attitudes and behaviour, and that the propensity for giving in this way is gaining ground beyond the baby boomer generation, particularly for those in their 40s and 50s."

"Legacy income increased to a record high of £3.9bn last year"

"This indicates that there's great potential for continued growth of the legacy market, but it also stresses the importance of supporter stewardship."

"Legacy income is crucial for an increasing number of charities. While we can't impact the economic environment that drives legacy values, we can positively influence the proportion of people choosing to leave a gift; by working together, and engaging with legal partners, government and others to make legacy giving a social norm."

The Remember A Charity consumer benchmarking study analysed more

than 2,000 charity donors aged 40 and over to track legacy giving attitudes and behaviour year-on-year.

Generational shift

Despite all the positivity, there are still obstacles to navigate when addressing legacy giving. Generation X charitable donors in the UK, for example, are less likely to have made a will than baby boomers when they were the same age. Recent research by Legacy Foresight found that those born between 1965 and 1980 were “feeling the squeeze more than their boomer counterparts and are more pessimistic about economic prospects”.

“With many having dependent children at home, gen X are more likely to be thinking carefully about how they spend their money,” the research found. “Their main aim was to try to hold on to what they had and to save planning for the future for when things feel more certain.”

“There’s great potential for continued growth of the legacy market”

The research found that gen X adults aged 50-54 appeared to be similarly wealthy to the baby boomer generation (born 1945-1964) when they were the same age, although with more money in pensions and less property. It also found greater polarisation of wealth among gen X adults, with the top quarter of

households owning 70% of wealth, compared to 65% for boomers. “While not good for wider society, this is positive for legacies, as it shows gen X holds significant wealth and increased wealth increases the chance of a charitable gift left in a will,” the research says.

Annual deaths are set to rise by almost a third to reach 825,000 in 2050, with gen X adults expected to account for 40% of those, according to the research. “While economic uncertainty seems to be delaying legacy decision-making, the good news is that donors don’t seem to be removing charities from their wills all together,” says Ashley Rowthorn, chief executive of Legacy Futures. “There is still a strong desire to give to causes that matter in life, as well as to family and friends, and charities need to use this moment of pause to deepen and strengthen relationships through good stewardship.

“As time moves on, charities also need to understand the changing generations and make sure they are engaging them on their terms.”

Probate backlog

Another obstacle is the probate backlog. Cancer Research UK (CRUK), for example has said it could be missing around £30m in legacy income due to a backlog of cases at the probate service. Remember A Charity vice chair Alex McDowell says that although there have been some improvements at the probate service, charities need “consistency and certainty” about the backlog. The

charity sector is currently missing an estimated £900m in legacy income contained within wills that are tied up in probate.

“Charities need to deepen relationships through good stewardship”

At CRUK, gifts from wills make up about 40% of the charity's overall income and 50% of its fundraising income. “It's a massive contribution,” says CRUK chief operating officer Angela Morrison. “If we think that we commit money for a minimum of five years when we give a grant, we need to have assurance that that income is coming in over that period of time. We cannot commit to spending that money unless we know it's going to come. We're making day-to-day decisions based on the fact that we don't know when this money is coming or the size of it.”

Legacy success stories

Despite the challenges to legacy giving, just a quick scan through the annual accounts of large charities shows how important gifts in wills are and how more organisations should be putting an emphasis on building their legacy programmes and investment strategies.

Great Ormond Street Children's Hospital Charity (GOSH) saw legacy income rise by £9m to £31m in the year

to March 2023, making it the second-largest fundraising income stream. A spokesperson from GOSH Charity says that it received several legacies over £500,000 during the year, which contributed to the increase.

Oxfam saw income from donations and legacies increase to £143.1m in 2022-23, compared with £138m in 2021-22, whereas Marie Curie's legacy funds, or money donated as gifts in wills, rose to a record high of £44m in 2022-23, up from £38.8m the previous year.

With income levels of this magnitude no charity regardless of size can afford to ignore legacies and the boom time fast approaching.

SECTION 1



Growing legacies

Director of Remember A Charity, **Lucinda Frostick**, examines how charities are embracing digital to secure gifts in wills

For legacy fundraisers, the shift to digital, accelerated by the pandemic, has enabled charities of all sizes to enhance their offline activity and reach new audiences with gifts in wills. They can target those with relevant interests or by demographics, and see almost immediately what resonates. Still, the abundance of options on the table – from social media channels through to pay-per-click, social posts, email and virtual events – means that it's not always easy to choose the best path.

Charities' use of digital

A two-year project from Legacy Foresight summarising data and insight from 38 large national charities reveals how widespread digital activity has become. Among the Legacy Fundraising 2.0 participants, digital accounts for one-fifth of legacy fundraising budgets and one hour

in every six spent by their team. They all expect to upscale resource on digital over the next five years. And yet, just two in five have a documented digital and social legacy fundraising strategy and few feel "very confident" about their approach.

"Digital offers great scope to make legacy stories more topical and less maudlin"

Those charities tend to find Facebook paid ads, promotion of free wills and paid search services such as Google Ads most effective in driving legacy leads and prospects. However, channel usage is limited, dominated by

charities' websites, Facebook and email, with half using Twitter. Looking ahead, there is growing consideration for using Instagram, YouTube and LinkedIn, which are gaining appeal with older audiences.

“With digital, we can interact, be playful, responsive, informative and inspirational”

Meg Abdy, former development director at Legacy Foresight, says: “It’s clear that digital offers great scope to make legacy stories more topical and less maudlin than they have been in the past. There are some fantastic examples of inspirational campaigns, but I think there’s greater potential. The sector could be pushing further – beyond the abundance of free-will messaging – and be even more creative in this space.”

Building organisational buy-in

Legacy fundraisers often face stiff competition from other fundraising and communications teams. Lack of air space is a common challenge and that’s heightened for legacy teams as they can’t always produce the immediate metrics sought by digital marketers.

Digital impact consultant, Madeleine Sugden, adds: “Until recently, digital was an add-on for many charities’ legacy programmes. During the pandemic, digital became front

and centre and it’s here to stay. This means that digital teams are often key gatekeepers for legacies. Some are open to this, especially where there is a legacy-first culture. In other organisations, there’s tension between digital comms teams and fundraisers because they have different attitudes to messaging, goals and KPIs.

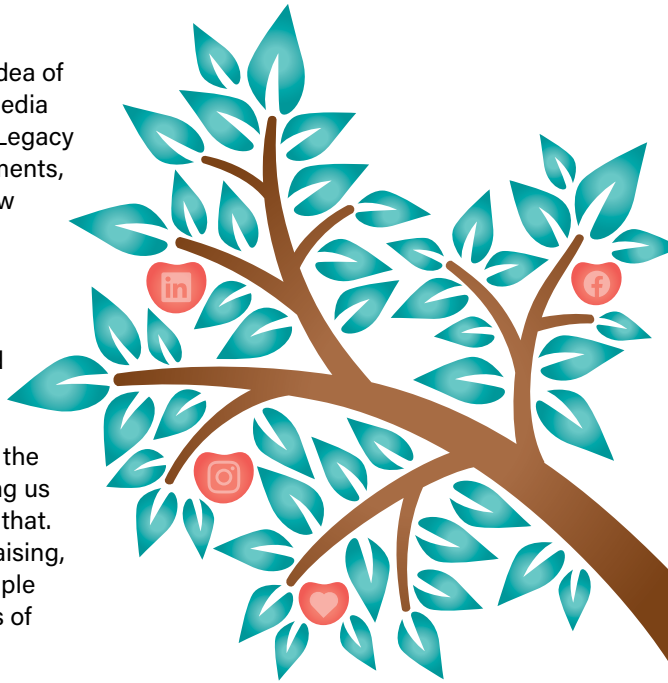
“Fundraisers understand that a few tweets just won’t cut it anymore. They need to take a strategic approach and work more closely with digital teams to build understanding to optimise digital channels for legacy campaigns.”

In 2021, legacies made the headlines when Uncle Ewan from the TV series *Succession* chose to donate his fortune not to his grandson Greg, but to Greenpeace. In the storyline, Greg then decides to sue Greenpeace, carrying the legacy plot across three episodes. The legacy, digital and social media teams joined forces to capitalise on this unexpected opportunity, quickly posting a blog and Twitter posts linking to their legacy giving information (including one directed at lead actor Nicholas Braun, who replied in character) and changing their Twitter handle to @gregpeace. Their quick work sparked a tenfold surge in traffic to the charity’s legacy webpage.

John Hutchin, head of key relationships marketing at Greenpeace UK, explains: “We’ve done lots of work internally at Greenpeace on the importance of legacies, which fund one in six of our campaigns. So, when this opportunity struck, excitement took hold and everyone got behind it; our

digital team came up with the idea of writing a blog, and our social media team reached out to the actor. Legacy fundraising rarely has cool moments, but this was it and we knew how important it was to seize that moment and run with it.

"It helps that Greenpeace is a dynamic place. We're used to being quick and responsive, and we already have a playful tone on social media, so taking a cheeky approach and tweeting the actor to dissuade him from suing us was very much in keeping with that. When it comes to awareness-raising, this was great. For the next couple of weeks we had huge amounts of traffic to our website."



"Digital teams are often key gatekeepers for legacies"

Fast-paced and accessible

Legacy audiences may be tech-savvy, but when they go online, they want to find what they are looking for quickly and easily. On charities' websites, legacies need to be clearly signposted and accessible, ideally with information about how people can leave a gift and what a difference it makes.

Strong legacy content will often cover the practicalities of writing a will, while also conveying emotively the impact of legacy gifts, appealing to both hearts and minds. This was the

case with Brooke's "How to" campaign, which prompted many new pledges and enquiries (see p10).

Digital trends move fast. At Remember A Charity, which is a consortium of 200 charities working to promote gifts in wills, digital has played an increasingly prominent part in our year-round consumer outreach programmes; for awareness-raising, equipping members, partners and solicitors with digital assets to share the legacy message, and inspiring the public with stories that showcase the impact of legacies to charities. But it's important to be aware that what works one year may not be the best way forward the next.

Take our Wombles ad campaign, for example, which ran on Facebook in

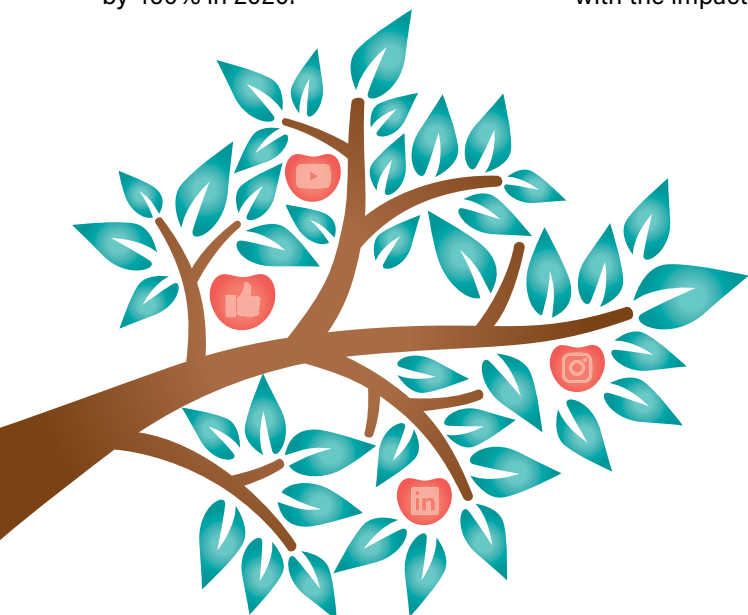
several bursts over the past two years, encouraging the public to remember a charity in their will. In 2020, we tested a wildcard short copy ad, which simply read "What the Womble!". It was a huge hit. The next year, it performed poorly compared with our longer copy versions. So, we pulled that ad and shifted our focus to those that were outperforming, helping to drive record numbers of new visitors (144,000) to our website in 2021.

"The ability to test, learn and adapt is key"

The ability to test, learn and adapt is key. This is demonstrated in the RSPB's adaptive acquisition campaign, which saw monthly legacy enquiries rise by 460% in 2020.

With such a fast pace of change, it's hardly surprising that many fundraisers don't feel fully confident in digital, particularly those who are new to it. But successful campaigns don't have to be complex or involve high-budget content. Raw video footage, authentic storytelling, infographics and well-timed emails can rival the most sophisticated campaigns, conveying the need for gifts and their impact.

With digital, we can interact, be playful, responsive, informative and inspirational, drip-feeding the legacy message and widening the net for future stewardship. We can test new ideas and content with relatively little budget. And, critically for legacies, we can communicate sensitively and emotively, inspiring the public with the impact of gifts in wills.



Exercises

Exercise 1

Key questions to discuss:

What existing resources do you have that can be tailored to legacy fundraising?

How can AI help increase legacy giving?

To what extent is your board of trustees supportive of legacy fundraising? What conversations can you start to get buy-in?

What networks does your board have that may be warm to legacy giving?

How can you best use social media to promote legacies?

Exercise 2

Thinking about your donorbase, which channels do you think would be most relevant to which target markets?

Match the channels to the audiences where appropriate:

Targeted events

Google Ads

Website

Email

Instagram

YouTube

LinkedIn

Baby boomers

Gen X

Millennials

Gen Z

TikTok

Facebook

DRTV

Print ads

Direct mail

X (formerly Twitter)

Case study

Brooke

With legacies bringing in more than 50% of its voluntary income, Brooke set out to diversify its legacy marketing strategy in 2019, reducing its former reliance on direct mail and events. Then the pandemic hit.

Implementing a digital-first approach, the charity designed a “How to” campaign that tapped into the public’s rising interest in wills and legacy giving by sharing tips on “how to write a will when social distancing”.

Building on that campaign’s success, the next phase in the series launched in September 2021, this time aiming to dispel one of the key myths about will writing – that it’s difficult and time consuming to do – while inspiring people to leave a legacy to Brooke.

Featuring long-time Brooke supporter and legacy pledger Angela Rippon as its figurehead, the campaign

launched with a video showcasing six easy steps to writing a will. It demonstrated how easy it is to include Brooke in a will and the life-changing impact such a gift could have to the lives of working horses, donkeys and mules around the world.

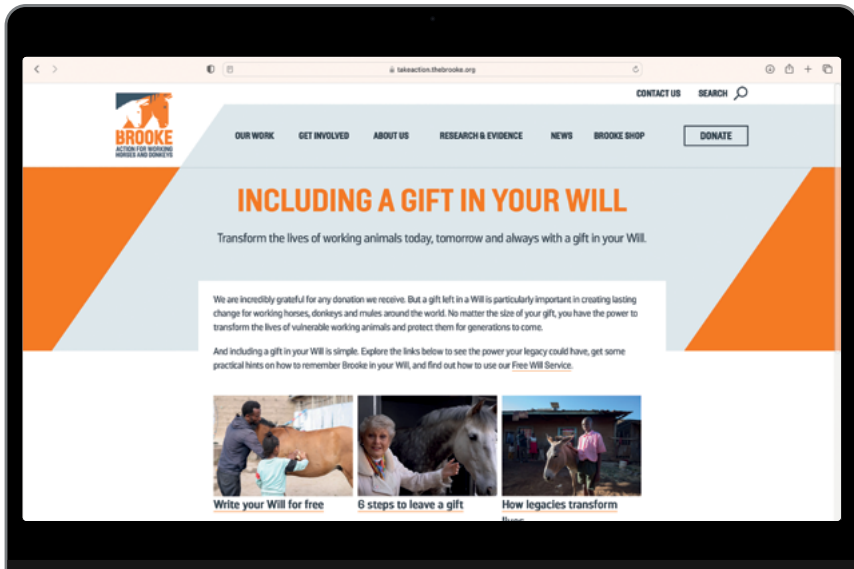
“It’s about delivering the right content, through the right channels to the right audience”

From September to December, campaign content was shared with Brooke supporters, legacy enquirers, internal audiences and promoted to the wider public using social channels



SIX EASY STEPS TO LEAVE A GIFT IN YOUR WILL

Have you been thinking about writing your Will? It doesn't have to be complicated. Brooke supporter Angela Rippon shares six easy steps to writing a Will and the reasons why she has decided to include a gift in her Will to Brooke.



(targeting those with relevant interests) and pay-per-click (PPC). It was also communicated by email, in print media and on Brooke's website, where it still sits prominently on the homepage.

In November 2021, the campaign landing page (thebrooke.org/legacies) attracted the most traffic of all Brooke webpages, while the email became one of the charity's most opened that year, with a 33% open rate. Email proved one of the most successful channels; 50 people responded to the legacy team and yielded 11 new pledges, 13 reconfirmed pledgers, one conversion of an enquirer to pledger and 14 new enquiries.

Brooke's social organic Facebook posts achieved 93,000 impressions

(with an engagement rate of over 7%), paid for posts reached 289,000 impressions and PPC a further 138,000.

Sarah Squire, legacy marketing manager at Brooke, explains: "Facebook ads were most effective for low-cost awareness-raising, driving a high volume of people to our webpages, where they could request a copy of our legacy information pack.

"Ultimately, it's about delivering the right content, through the right channels to the right audience. Digital is key in enabling us to do that in a way that engages our target audience and is cost-effective; with the added bonus of ensuring that we understand what approach has the most impact."

Exercises

Exercise 1

Compare and contrast – How different are legacies at Brooke? than at your charity?

Brooke

Percentage of income = **50%**

Legacy ambassador = **Angela Rippon**

Facebook engagement rate = **7%**

Newsletter open rate = **33%**

Total social media reach = **520,000**

Legacy strategy = **digital first**

Your charity

Percentage of income =

Legacy ambassador =

Facebook engagement rate =

Newsletter open rate =

Total social media reach =

Legacy strategy =

Exercise 2

Key questions to discuss:

What would your campaign be called?

How can you include legacies in existing comms?

Which digital channels would be the best to promote legacies for your charity?

Who is your target audience for legacies? Why?

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- ☐ Define your audience demographic for legacies
- ☐ Identify your best channel
- ☐ Get trustee buy-in
- ☐ Identify your strategy's focus
- ☐ Utilise existing content
- ☐ Define campaign strategy

Notes:

Resources

Case studies:

RSPB

civilsociety.co.uk/legacyresources

How to use animated, digital film and a booklet to promote legacy giving

Greenpeace

civilsociety.co.uk/legacyresources

Great use of live footage as part of a gift-in-wills campaign

UNICEF

civilsociety.co.uk/legacyresources

Excellent digital booklet and donor guide for leaving gifts in wills

Guidance:

Remember A Charity

www.rememberacharity.org.uk

A consortium of 200 charities working to promote gifts in wills

Legacy Futures

legacyfutures.com/legacy-showcase

Showcasing some of the most inspirational campaigns of recent years

Freewill

resources.freewill.com

Handy guide to how you can use Facebook to acquire new legacy donors

SECTION 2



Developing legacy **strategies**

Marketing and business development manager at Flourish, **Aimee Blakemore**, shares her expertise in talking to donors about legacy giving

Popping your clogs. Kicking the bucket. Shuffling off this mortal coil. It's tricky to talk about the "D" word. But with Legacy Foresight predicting legacy gifts will top £500m each year by 2024, it is an opportunity charities have to grab.

Here are some tips on how charities can develop strategies to strengthen their legacy campaigns:

Don't be afraid to ask

Most people are actually willing to talk about legacies even though it ultimately means talking about their death. Many older people have made peace with the fact that they won't live forever. And the desire to make sense of what it was all about is often a motivation to leave a legacy. If you haven't already asked your warm supporters if they have left a gift in

their will, or if they would consider it, do it tomorrow – you may be surprised by the results.

“Gifts in wills account for a huge proportion of annual income”

For many charities, gifts in wills account for a huge proportion of annual income – often as much as a third of their yearly funding. Guiding audiences through the legacy giving process despite the taboo surrounding death proves a challenge. But with over 30% of income potentially at stake, it's one that must be taken on.

Record numbers of people are leaving gifts in their wills, a trend

showing no signs of slowing. Charities should waste no time in preparing the ask.

Be more effective

With many charities already rolling out legacy campaigns, increased awareness is part of the reason for the upward curve in legacy giving. Legacy fundraising is a top priority for two-thirds of charities. Yet a recent study uncovered that 32% of millennials and 29% of Generation X had never seen an advertisement for legacy giving.

However, more than a third of millennials said they would be interested in a free will-writing service if offered by a charity. There's still room for charities to increase their exposure in the legacy giving space, and by targeting an unlikely audience, there's a strong chance they'll reap the benefits of greater gifting. After all, the appetite to do something meaningful and leave a legacy is there. Sensitive, thoughtful legacy journeys deployed to the right audience have the potential to capture a phenomenal amount of donations for charities.

Make the most of awareness days

There are two awareness days which charities should have on their horizon: Remember a Charity Week and Free Wills Month in September and October respectively. Awareness days provide the perfect opportunity for charities to showcase their legacy offering through social media and PR. It's a chance to educate audiences on legacy giving and dispel some of the myths

surrounding gifts in wills.

For example, CLIC Sargent released a campaign in time for Free Wills Month, resulting in a 52% increase in legacy forecast. To achieve this, the charity ran a targeted multichannel campaign that included direct mail, social media, telemarketing, PR and paid search activity.

“To be successful, charities have to drip-feed legacy messages to donors”

Likewise, a recent multi-channel legacy campaign by Crisis has secured at least £200,000 in residuary gifts at the time of writing. Thanks to careful strategic planning, Crisis was able to take its supporters on a journey, as well as capturing the attention of cold audiences.

Explore different channels

Legacy activity can't be viewed in isolation. To be successful, charities have to drip-feed legacy messages to donors. This means identifying communications where messages could be placed – think newsletters, annual reports and social media. Use a range of media and touchpoints such as paid media, social media, email marketing, search engine optimisation, and website landing pages. This creates a form of data capture for

different stages of the supporter journey (ie some people may wish to become pledgers, but some may wish to show interest and come back later).

Target the right audiences

A multi-channel approach can only be rolled out with good customer relationship management (CRM) in place. Segmenting your audience and serving the right people with the right message requires great CRM. By targeting and re-targeting, you can ensure you're priming audiences before scooping up intenders, allowing you to break down your messaging to appeal to those right at the beginning of the journey who may not have thought about leaving a legacy gift before.

With the sensitivities surrounding legacy gifting, meeting your audience where they are and ensuring they feel seen and understood is all-important. Make sure you are targeting the appropriate groups with the most helpful content possible and take your audience on a journey with you. Although some won't be ready to leave a legacy gift right now, that doesn't rule them out for the future. Find out as much as you can about your audience, and it'll help your charity to plan as well.

Creative matters

For most, if not all, charities there's an emotive message at the core. Bring this to the forefront of the creative when asking people to pledge a gift in their will. Writing a will might be a pragmatic exercise, but motivations for pledging

to charities in wills are emotionally charged. The creative should speak directly to the audience. The creative for Crisis, for example, appealed to a specific generation, posing the emotive question: "Surely our generation can end homelessness?".

Know your place

The normalisation of legacy giving means leaving a gift in your will isn't the big decision it once was. Now the big decision is which charities receive help. On average, legators leave 3.3 charitable gifts per will. Understanding that you are in competition with other charities is useful as it informs the approach you take to properly nurturing the relationship instead of taking it for granted.

"A multi-channel approach can only be rolled out with a good CRM in place"

Overcome the barriers

There are several common misconceptions surrounding legacies. One of these is that legacy gifts are only for the wealthy. The reality is that this is not the case; the average pecuniary bequest was worth £3,400 in 2020. Help your audience overcome this barrier by reminding them that any amount they donate is gratefully received and reassuring them that

leaving a gift in their will should not stand in the way of leaving something for their loved ones.

“It’s unrealistic to expect someone to pledge a gift immediately”

Another fallacy is that making a will is a long and costly process. But with free will-writing services such as Farewill, anyone can write a simple will for free when they include a gift to their chosen charity.

Prompt a positive action

It’s unrealistic to expect someone to pledge a gift immediately, even if they are your most committed donors. So, make sure your call to action from any activity allows for a positive action. Free-will offers play a huge part, but so do legacy guides – more information a potential legator can request so they can make an informed decision. A positive action is a hand raised with a clear expression of interest. It also gives you an opportunity to go back to them – to ask if they have all the information they need, or to ask if you can answer any questions they have.



Exercises

Exercise 1

Without looking, how many of the nine tips you can remember?

1.

2.

3.

4.

5.

6.

7.

8.

9.

Exercise 2

Planning checklist:

Plan your campaign ahead of awareness days. Optimise PR opportunities by sharing in the right place at the right time.

Segment your audience. Make the most of CRM and personalise your messaging to suit the audience.

Use case studies and examples. The voice of a legator resonates more deeply than the voice of your organisation.

Create a strong, emotive concept. Without strong creative, your message will fall flat – especially considering the sensitivity of the topic.

Maintain stewardship for those who have pledged. Make regular contact, and acknowledge the difference that gifts in wills are already making.

Case study

WaterAid

WaterAid's legacy and in-memory lead, **Dominique Abranson**, offers insight into planning a TV ad campaign

Television is a brilliant visual and emotive storytelling platform – a valuable tool both for raising awareness of the impact of legacy giving and encouraging action.

One of the reasons we at WaterAid were keen to start moving into TV is that 46% of our legacy notifications every year come from people who aren't on our database.

Some charities are already using TV for legacy marketing. If you haven't tried it, it's worth considering but in a competitive space, the approach must be right for your charity to stand out.

“Television is a brilliant visual and emotive storytelling platform”

If your main objective is an immediate response to your charity – such as to prompt legacy pack and free-will requests from those actively contemplating their will, then DRTV's strong call to action could be for you. If you're seeking to increase long-term

legacy consideration for your charity that will influence decision-making when the viewer is writing or updating their will, a brand response (BRTV) approach, which we took with our What Jack Gave ad, can build awareness and engagement. Each charity must look at their own strategy and objectives to decide which is best for them.

BRTV's focus on storytelling provides the space to build an emotional response with a wide audience that pulls on the heartstrings, stays in the mind and connects their values to your cause. This can be particularly useful if, like us, your cause isn't so personally relevant. Tell a story that not only demonstrates the impact your work has, but the impact of a single legacy. This will build awareness and deepen people's emotional connection with your cause. It's why we used Jack's story to show how someone's legacy can live on through their loved ones, and through the gift of clean water.

Music is a great addition to any ad because, chosen well, it stirs another level of emotion, affecting how people feel towards what they're seeing and

building engagement. It can also make people sit up and take notice – a challenge in this age of dual screens. Consider adding a track that will resonate for your audience alongside the story you're telling to help connect their feelings to what they're viewing. We used Roberta Flack's *The First Time Ever I Saw Your Face*, knowing a broad range of people and age groups really connect with this song and hoping it would enrich the experience and help the ad be remembered.

Care is also needed with BRTV to ensure that any call to action (CTA) doesn't detract from the emotion you want to leave people with. If your objective is to build consideration, the impact that leaving your charity a legacy can have is what needs to stick in people's hearts and minds. We kept it simple with the WaterAid logo on

throughout and a CTA of "Add water to your will. Search WaterAid legacy" at the end. This meant viewers' attention could remain on the story throughout, leaving them the space afterwards to reflect on it and how it made them feel.

"You'll get best results through consistent messaging"

Finally, no channel operates in isolation, and you'll get best results from a campaign reinforced through consistent messaging shared across all other touchpoints, such as social media and print. So, plan your BRTV with your digital activity and wider communications in mind.



Exercises

Exercise 1

Key questions to ask:

What would our legacy story be?

How could you re-use the resource once it had been created?

What is your main objective?

How would a TV campaign fit alongside other fundraising activity?

What music would you choose?

Exercise 2

What would your call to action be? Write down three potential taglines:

1.
2.
3.

Which is your preference and why?:

.....

.....

.....

.....

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- ☐ Define your legacy campaign objectives
- ☐ Segment your audience
- ☐ Decide which stories to tell
- ☐ Create emotive content
- ☐ Put in place pledgers' journey

Notes:

Resources

Case studies:

WaterAid

civilsociety.co.uk/legacyresources

Watch WaterAid's What Jack Gave BRTV ad [here](#)

NHS Charities Together

civilsociety.co.uk/legacyresources

Highly successful legacy TV campaign from NHS Charities Together

Remember a Charity in Your Will

civilsociety.co.uk/legacyresources

Mass appeal TV ad encouraging the public to give legacy pledges

Guidance:

Culturehive

culturehive.co.uk/resources/how-to-develop-a-low-budget-legacy-campaign

Guidance on how to develop a low-budget legacy campaign

Chartered Institute of Fundraising

ciof.org.uk/events-and-training/resources/legacies

A look at the main things to consider when planning a legacy campaign

Donorbox

donorbox.org/nonprofit-blog/legacy-fundraising

All-encompassing blog on planning a legacy strategy

SECTION 3



Adapting legacies to new trends

Co-founder of Legacy Foresight, **Meg Abdy**, offers her top tips on how to adapt legacy fundraising to changing consumer behaviours

Legacy giving is undoubtedly one of the fundraising success stories of recent times. Over the past 30 years, real legacy income (after inflation) has trebled in value, set to reach a record £4bn per annum, and is expected to grow strongly over the next three decades. At Legacy Foresight, we forecast that legacy incomes will double in real terms (after inflation) by 2050.

“Digital brings huge opportunities to raise awareness and build relationships”

But that doesn't mean we can keep doing what we've always done in the

belief that donors will keep on giving as they have before. We are a diverse population, ever evolving, and those charities that are successful with legacy fundraising understand the nuances of changing consumer behaviours and respond effectively. Our clients are reporting boards' fresh willingness to invest – that in turn is leading to innovation in strategies and channels, and more creative, ambitious legacy messaging.

After 30 years analysing gifts in wills, here are my top tips on how to adapt legacy fundraising to changing consumer behaviours.

Recognise a new generation

Compared to the war babies who are leaving gifts today, the profile of legacy donors is changing. The expected income growth is thanks to the number,

wealth and attitudes of today's 60+ population. The dominant group over the next 30 years will be the baby boomers – born 1946-64 – now in their 60s to mid-70s.

Growing up in an age of mass media with an opportunity to travel and meet people from different cultures, their worldview is broader and more fluid than previous generations. Alongside perennial favourites of health and animal charities, boomers are likely to support environmental and overseas development charities. Triggered by the pandemic, we also see new interest in causes closer to home, including homelessness, mental health, food banks and charities linked to the NHS.

“The Muslim population is a significant opportunity for legacy fundraisers”

These consumers have been exposed to escalating legacy messaging over the past 30 years; awareness and interest in this form of giving is reassuringly high, with half of all boomers open to the idea of leaving a gift in their will.

Your legacy communications need to connect with your supporters and tap into their worldview, their desires and circumstances. Show the bigger picture and the tangible impact.

Be transparent and clear

The women in this generation – which

have become key influencers in legacy decisions – have seen their role expand enormously. They have enjoyed more access to education (30% of women born in the 1960s went to university, compared to just 16% of women born in the 1930s), longer working lives, more financial independence and greater self-confidence.

Boomers – both men and women – are demanding and questioning. Compared to the more accepting warbaby generation, they expect more proof of how their gift will be used, the value it will bring to the cause and the way it will be managed.

When you're communicating the power of legacies you need to be honest and open, using case studies and figures. You might allow access to behind-the-scenes activities, or offer conversations with staff and service users, so donors can understand how their money will be used.

A diverse population

The population is also far more diverse – 11% of today's 60-somethings are non-white, and latest census data shows this is growing fast. In particular, the Muslim population is a significant opportunity for legacy fundraisers, as charitable giving plays an important role in Islamic culture.

Until now, British charities' portrayal of legacy donors has been woefully one-dimensional. Research by Drs Claire Routley and Haseeb Shabbir looked at the depiction of donors, beneficiaries and service delivery staff in legacy brochures from 100 leading

UK charities. Their research showed that just 5% of legacy donors depicted were non-white, along with 30% of service delivery staff and over half of all beneficiaries, suggesting something of a white saviour premise. Astonishingly, five of the top 10 legacy charities did not have any non-white images in their legacy brochures. And where non-white people were depicted, they were often nameless, faceless and voiceless.

“Legacy campaigns need to show impact, build trust and create empathy”

Surely if legacy fundraising is about changing social norms – as Dr Russell James puts it, about saying “people like me do things like this” – we risk alienating a population simply by not representing them.

It’s important not to generalise. There are huge differences between cultural groups and within them too. Ensure your legacy communications depict the full range of cultures and that you give equal voice and humanity to all people. Plan your strategy with care and think about the communities which matter most to you. Tailor your channels, media, messages and languages to your target audiences, working through the host of specialist community websites, radio stations and social networking groups out there.

Build relationships with third parties working in those communities such as solicitors, funeral directors, places of worship and schools, and consider co-operating with faith-based charities too. Play to your own strengths and collaborate rather than compete.

Harnessing the value of time

We know that the more engaged a supporter is with a charity, the more likely they are to leave a gift. Most boomers are now retired or approaching retirement – bringing a very different lifestyle and mindset. They may be more financially cautious but, for now, have time and energy to spare. They will be looking for inspiration, community, fun and new things to learn, with the potential to become brilliant volunteers, campaigners or trustees.

Move away from a reliance on direct marketing towards more personal interaction through fundraising events, volunteering, campaigning and so on. Your legacy specialists will need to build bridges with



the teams that interact directly with supporters, such as volunteer management, community fundraising and major donors.

Ultimately, it's about embedding a legacy culture throughout your organisation.

***“Be brave, think big,
and make your mark”***

The power of digital

Digital brings huge opportunities to raise awareness and build relationships. Our recent research shows that compared to younger generations, usage among boomers

is functional – using the web for information and accessing services, rather than entertainment or content generation. Clear,

straightforward communications that are easy to navigate, well laid out, brief and visual are essential. The right tone of voice is also vital – think friendly, warm and approachable. Digital boomers are seeking a purposeful, rather than transactional, relationship with

charities. As well as inspiration, they want to stay informed, and learn about outcomes.

To build long-term commitment, legacy campaigns need to show impact, build trust and create empathy. Communicate the joys of legacy giving alongside the credible benefits.

Family first or building togetherness?

Over time we have seen boomers' confidence and comfort eroded by the growing economic and social uncertainty. What we increasingly hear from those with children – and particularly those with grandchildren – is that family must always come first.

With the huge multidimensional uncertainty we are facing now, we can expect such self and family-first attitudes to become even stronger. But we also know that the legacy fundamentals are resilient and enduring. Despite the uncertainty, or perhaps because of it, people are still keen to give something back, to work together to leave their world a better place.

You may have to work harder to counteract the turmoil and noise, but supporters will still make space in their wills for charities which have touched their lives deeply, or champion the things they care most about.

The population is shifting, attitudes are changing. The new consumer landscape is radically different. But charities can harness this for legacy giving success.

So, be brave, think big, and make your mark.



Exercises

Exercise 1

Note down some of the key figures around legacy fundraising:

Figures Legacy fundraising

£	expected real legacy income per annum
%	today's 60-somethings are non-white
%	of women born in the 1960s went to university
	years when baby boomers were born

Exercise 2

Key questions to discuss:

How representative of the population is your legacy programme?

How can you engage with more diverse communities?

How are you engaging the next generation of legacy givers?

What unique selling points does your charity have as a legacy proposition?

What digital channels are the most effective for reaching your audience?

How can you get buy-in from across your organisation for legacies?

Case study

RSPB

Legacies are a crucial income stream for the RSPB and yet, without an active legacy fundraising programme in recent years, the number of pledgers was in decline.

Aiming to reverse that trend and to inspire more nature lovers to consider the charity in their will, the RSPB appointed Catsnake: The Story Agency to help develop a digital storytelling campaign that would convey its mission to protect habitats, save species and help end the nature and climate emergency.

“RSPB was able to continually adjust the campaign around the most successful and timely elements”

Launching in 2020 on the RSPB's social channels, the video and story-based campaign was a first for the RSPB legacy marketing team. Developed as an adaptive acquisition campaign, multiple variants were trialled, from the emotional drivers woven into the copy to the specifics of the storyline, its length, and more.

In another first, in 2021 the charity launched its DRTV legacy advert, which ran alongside waves of the campaign on social media, amplifying its impact.

With ongoing monitoring and testing, the RSPB was able to continually adjust the campaign around the most successful and timely elements, delivering bursts of activity at key moments and enabling it to keep legacies front of mind with an evolving storyline.

Vicki O'Hare, head of legacy marketing at RSPB, says: “Although we spent a great deal of time planning our narrative and how it could develop, this campaign felt miles apart from what we'd done before. It was nerve-racking doing something so new and different. But we had a great response and it's transformed how we feel we can inspire supporters and articulate our legacy message going forwards.”

Setting an ambitious goal of increasing the average number of legacy enquiries by 300% per month, the RSPB exceeded this target and, in 2020, topped a 460% monthly increase.

O'Hare adds: “We found that our older audiences are not only increasingly tech-savvy but also that digital channels work for them. Legacy giving and end-of-life planning



“A key success metric for RSPB was the level of opt-ins to future communications from engaged supporters”

can be very personal, and they like having the opportunity to download information and digest it in their own time. Still, we aren't just thinking about older people here. More people are thinking about wills at a younger age

and we want to be visible in that space for them too.”

A key success metric for RSPB was the level of opt-ins to future communications from engaged supporters. O'Hare concludes: “What's worked so well for us is that, thanks to the quality of the new enquirers we've had from our digital campaigns, we've been able to build on that engagement and steward those supporters. More people have signed up for communications from us and, in just a year, our newsletter open rate has jumped from 23% to 42%, and our click-through rate more than doubled.”

Exercises

Exercise 1

**Which of these channels do you already use for legacy campaigns?
What form did the campaigns take and what were the results?**

Channel	Yes	No	Don't know	Type of campaign and results
DRTV				
Newsletters				
TikTok				
Facebook				
Instagram				
Direct Mail				

Exercise 2

Key questions to discuss:

What was the key to RSPB's success?

What was its key metric?
What key metric would you use?

Would you use an outside agency?

What are your warm audiences for legacies?

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- ☐ Identify warm audience
- ☐ Define which channels would work for you
- ☐ Outline key storytelling
- ☐ Define key messaging
- ☐ Select/research agencies
- ☐ Decide on metrics for success

Notes:

Resources

Case studies:

Brooke

civilsociety.co.uk/nextstepsinfundraisingresources

Useful frequently asked questions section informing donors of how to leave a legacy

Dogs Trust

civilsociety.co.uk/nextstepsinfundraisingresources

Good use of video to encourage people to leave a gift in their will

WaterAid

civilsociety.co.uk/nextstepsinfundraisingresources

WaterAid's most successful video legacy campaign to date – What Jack gave

Guidance:

Institute of Legacy Management

legacymanagement.org.uk

Resources and training on legal aspects of legacies

GOV.UK

www.gov.uk/guidance/wills-and-charitable-legacies

Guidance around fundraising through gifts in wills, produced in collaboration with the Charity Commission

Fundraising Regulator

www.fundraisingregulator.org.uk

Code of Fundraising Practice has dedicated section for legacy and gifts in wills

SECTION 4



Creating a **legacy plan** *with limited resources*

No charity is too small to have a legacy strategy in place. But where do you start? Fundraising manager at HEART UK, **Charlotte Hoare**, offers some top tips

Here at HEART UK – the only charity in the UK dedicated to supporting people to avoid heart attacks and strokes caused by high cholesterol – we are by no means the smallest charity appealing for legacies (our turnover is just over £1m). But we don't have sizeable resources in terms of staff or volunteers or operating budgets. Legacies are hugely important to us and we recently set out to put in place a strategy to support that. So, here are my tips for a legacy strategy for charities with limited resources.

Do your research

The first thing I did was to review current lifestyles and trends and reflect on the changing population. It's predicted that over 20% of the UK population will be over 65 by the time

we reach 2025 compared to just over 15% in 2015. People are living longer. There are more choices and pressures on how to spend our money, such as helping children with their first deposit, an increase in separated/extended families and more people taking out equity release to secure their future.

***“Mention the tax
benefits of leaving a gift
to charity”***

All this means there is more competition for the legacy pot. It's important to do some background to understand the challenges; it's also really interesting.

Make it simple

Of course, you can't leave a legacy to a charity if you don't have a valid will; it's the only way to ensure that your wishes are carried out when you die. This is a really key message to get across to your supporters.

“Stories about why people want to leave a legacy are so impactful”

At HEART UK we offer a will-writing service to encourage supporters to take that step. There are key times when people typically make a will – marriage, children, divorce, retirement – these can be reflected in your legacy communications; and don't forget to mention the tax benefits of leaving a gift in your will to charity.

Be proud

Case studies of people who have pledged to leave your charity a legacy are so important – place stories and photographs on your legacy page and share. Stories about why people want to leave a legacy are so impactful and help so much with marketing legacy giving. Have a look at Yvonne's case study on our website. Not only is it a good story, it demonstrates the love Yvonne has for the charity, and the comfort she gets from knowing her legacy will help to continue the good work we do.

Small can be better when it comes to legacies

In general, small charities can be more agile and build stronger, more personalised relationships with their supporters. A great starting point for legacy fundraising.

It's a double-edged sword, however. From an administrative perspective, smaller organisations also often face the challenge of not having dedicated staff to undertake the administration of estates. It is therefore either outsourced, delegated to an external consultant or added to the already long list of roles juggled by someone who can't give it the time it needs, perhaps in the finance or legal team, or, even by the CEO. All of which will see the estate administered, but it's unlikely that the impact will be truly optimised, or that the brand messaging will be consistently reinforced, or that foundations for longer-term relationships will be built. Legacy administration is about so much more than “thanking and banking”, and without dedicated staff many smaller charities are missing out on the wider opportunities legacy gifts present.

Legacy fundraisers have to combine practicality and emotion – they know the detail of converting a gift into real income for the charity

(staying up to date on complex legal and accountancy issues), and yet also, at the same time, how to deal successfully and sensitively with family members who have lost a loved one. They also have to be good at championing their own cause, and negotiating the complex political landscapes of their organisations. At their best, they are more than legacy fundraisers, they are thought leaders.

“Legacy fundraising has a strong role to play for smaller organisations”

As well as having the right staff in place, the success of any legacy programme is rooted in the culture of an organisation. Legacies need to be part of the organisational DNA, recognised and championed by senior leaders but also supported, through the appropriate tools and knowledge, by staff on the ground.

Smaller charities have another advantage here, in that the larger an organisation becomes the harder it is, as each team vies for a ‘moment in the sun’, to get and keep legacies on the agenda, and to connect up the fundraising and supporter pipeline, so judgements can be made as to when and how to shape a legacy conversation in the most appropriate way.

There are interesting times ahead. We’re currently preparing ourselves for the effects of the baby-boomer generation – those with the ability and the motivation to leave more gifts in their wills than ever before. But we’re also expecting to see an increase in the number of restrictions on the use of that money, given that the baby boomers are also a more informed and savvy group in terms of their relationships with and expectations of the charity sector. I think small charities are probably, on balance, in a better position than their larger counterparts to be able to respond to those restrictions, which might limit the use of the funds to a particular area, theme or project for example. Cumbersome internal processes mean larger organisations can struggle to be as agile.

Organisations should be looking to develop a balanced approach to fundraising – given the longer lead times and the fantastic ROI – I think legacy fundraising has a strong role to play, especially for smaller organisations where a secure pipeline of future funds and a cost-effective fundraising programme are essential.

By **Chris Millward**, legacy consultant

Know your long-term vision

It's vital to ensure you have a long-term vision. Before anyone considers leaving your charity a legacy, people will want to know and be confident that your charity will be around for the future, for their children and even their grandchildren. You need to demonstrate impact – what a legacy can do for your charity. And you need to ensure this is clearly communicated on your website and other fundraising channels with a strong call to action.

“It's vital that the comms strategy supports fundraising”

In my experience, drip feeding the message is really important, highlighting legacies in every monthly e-newsletter, in social media posts, email sign offs and more. Consistency is key.

Embed legacies across your communications

At HEART UK, our Communications Department is a team of one. But it's vital that the comms strategy supports fundraising, particularly in this digital age where social media has so much impact. Decide your target market, tailor your messaging and if budgets allow, put some spend behind some of your posts. Develop a few options, test and see what performs the best.

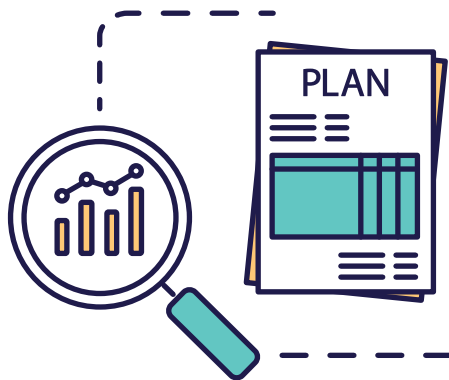
Do approach your trustees and

ambassadors and get them involved – challenge them – what are they doing to promote legacy giving? How can they help?

Relationships, relationships, relationships

Ultimately, relationship building is the most important element of legacy giving. Keep your donors and supporters informed about your work, continue to build trust, demonstrate the role that your organisation plays in society and the impact of legacies within that.

On a final note, sometimes we're not aware an individual has left us a legacy until we are notified after their death. But we do know for certain that, along the way, HEART UK has touched their life in some incredible, meaningful way. Any supporter could choose to have their legacy live on by leaving a gift in their Will, so make sure everyone – internally and externally – knows just how important legacies are in enabling the charity to achieve its mission and how to make it happen.



Exercises

Exercise 1

HEART UK offered six keys to a successful strategy. Without looking at the article, how many can you remember:

1.

2.

3.

4.

5.

6.

Add any that think are specific to your organisation:

1.

2.

3.

Exercise 2

What do you think are the pros and cons of being a small charity when it comes to building a legacy programme:

Pros

Cons

Case study

Bees Abroad



In 2020, I became a trustee for Bees Abroad; an NGO empowering communities through sustainable beekeeping practices. I saw a real opportunity to help develop the brand, grow activity, and extend the reach of the charity's excellent work.

Drawing from my experience in fundraising and having worked with larger organisations such as Cancer Research UK (CRUK), legacy giving stood out as a key area to introduce.

However, at the larger organisations they had big teams and an understanding of how best to drive activity across communications. It was very new for us at Bees Abroad and we didn't have the resources to promote

things in the same way. As a smaller charity, seeing larger charities with a significant amount of their revenue coming from legacy gifts, it can sometimes feel daunting and unattainable.

I was also working as head of partnerships at the Prince's Trust during the week, so most of my work to implement a legacies programme at Bees Abroad was during weekends and late in the evenings after work, which was initially challenging.

"We've benefitted from the shared learnings of other charities"

We looked at how to incorporate promoting legacy giving into different areas of our work. From distributing informative bookmarks during events Bees Abroad attended, weaving information into our newsletters, to driving messaging across our social channels and website.

But for our organisation, it was a new style of communication to our supporters. To help with this activity, we invested in third-party support and have now hired a campaign manager.



We've seen the benefit of working with industry experts and partners. They extend your team's capabilities, offer access to resources beyond your reach, and work as an extension of your team to drive more activity with fresh ideas. Being open to partnerships and collaborations from the get-go, we've benefitted from the shared learnings of other charities a little further along in their legacy timeline – enabling us to work smarter, avoid similar pitfalls, and maximise opportunities available to us.

Three years since launching the programme, many supporters have pledged to leave something in their will to Bees Abroad and the charity has received its first legacy gift.

Beyond the introduction of a new income stream, our legacy journey has also introduced a number of broader advantages, including elevating the brand and gaining exposure that has increased engagement across digital channels.

“One lesson for small charities is not to be afraid to aim high”

We made the most of every media and PR opportunity that was presented to us – from workshops with other charities to sharing case studies – helping to expand our reach to new audiences and potential supporters.

One lesson for small charities embarking on a legacy journey is not to



be afraid to aim high and follow in the direction of larger charities. Whilst you may not have the resources, find ways to alleviate this internally by working with third-party platforms or member organisations.

It is important to bring the whole organisation on board. Legacy gifts are relevant to all charity departments, so it is key for everyone to understand their value. This is something teams at CRUK always did well – sharing across the organisation what is happening in different departments – but it is helpful for organisations large and small. It is always good to understand the value of different income streams and communications channels. We make a bigger impact when working as a collective

Finally, have fun with the campaigns and communications. We found that a campaign using a light-hearted and creative way to begin discussions about the lasting legacy that supporters can leave for causes they care about. It helped to make what can feel like a difficult conversation feel positive and warm.

By Bees Abroad trustee **Hania Gudiens**

Exercises

Exercise 1

Try to think of a few phrases that could help you open a legacy conversation with your donors:

Exercise 2

Some questions to discuss:

Which current legacy campaigns are you aware?

What legacy campaign do you most admire? Why?

Which are the most effective? Why?

Why do you think a supporter would leave your charity a gift in a will?

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- ☐ Research donor prospects
- ☐ Set long-term strategy
- ☐ Put in place free will-writing service
- ☐ Develop messaging
- ☐ Trial and test communication channels
- ☐ Embed legacy messaging across comms

Notes:

Resources

Case studies:

HEART UK

civilsociety.co.uk/legacyresources

Take a look at Yvonne's legacy story [here](#)

Havens Hospice

civilsociety.co.uk/legacyresources

Havens Hospice online Remembrance Garden is an example of an effective and emotive way of how a small charity can build an in-memory offer

Bees Abroad

civilsociety.co.uk/legacyresources

Learn more about how Bees Abroad is building its legacy programme

Guidance:

Small charity guide to legacy giving

tinyurl.com/9t6jjw65

Charity Digital offers some quick gains for small charities looking to start a legacy programme

Small Charity Support

smallcharitysupport.uk

Offers governance and legal advice for small non-profits and has a useful legacy download resource

Small Charity Week

smallcharityweek.com

Usually held in June, offers plenty of resources available around legacies and small organisations

SECTION 5



Securing **investment** *for legacies*

Director at Remember A Charity **Lucinda Frostick** shares some top tips and best practice for making the case for investment in legacy fundraising

Without the promise of immediate returns, securing budget for legacy investment from charity finance directors, board members and other senior leaders can be challenging at the best of times. Add to that the barrage of recent events, ranging from the pandemic to the sharp rise in living costs, compounding the need for cash income, and it's no surprise that there's so much appetite from fundraising teams for insight on making the case for investment in legacies.

With annual legacy income predicted to double by 2050, it's an area that fundraisers cannot afford to ignore. But how do you convince those with the purse strings to invest now?

One of the most important points from the outset is to understand what

investment you really need – be it money, time or expertise. It's clear that there is no one-size-fits-all approach. Depending on where your organisation is in its legacy journey and what level of support you need, the barriers and drivers for change will vary. Get this right from the start; think carefully about what you're asking for, who you need to win over and what evidence they need from you.

*“Securing budget for
legacy investment ... can
be challenging”*

Here are a few other important elements to include when stating your case for investment:

Highlight legacy market potential

Legacies brought in £4bn for charities in 2022-23 – a phenomenal sum that's due to grow over the coming boomer decades, with £5.5tn expected to be passed down to the next generation between now and 2055. Those with the purse strings will only invest if they believe they have a winning ticket, so make sure you highlight the strength of the market and predictions for growth, together with the size and scale of legacy gifts.

“Celebrate legacy successes internally to sustain focus”

Head of legacy engagement at Oxfam, Sinem Bilen-Onabanjo, says: “When we mentioned what an average residuary legacy gift could equate to in terms of monthly giving, there was almost an audible intake of breath from the room. People don't realise how huge legacies are and what the potential is.”

Communicating supporters' growing interest and willingness to leave a legacy is important too. Our annual benchmarking research indicates that 20% of charity supporters aged 40+ have left a gift in their will, up from 14% a decade ago. What's more, twice as many say they would be happy to leave a gift in their will, so there's significant scope for growth.

Manage expectations

A successful legacy income stream can be vital for an organisation's sustainability and resilience, but we need to manage expectations. The reality is that legacy income won't appear overnight – no matter how brilliant your fundraising team or campaigns might be. You'll need to be clear about how long it might take, while explaining why it's worth the wait. Show the tangible difference that longer-term income could make for your charity and the need for stability in such challenging economic times. Celebrate legacy successes internally to sustain their focus and engagement on the topic, articulating the difference that gifts will make. It doesn't hurt to signpost the big wins for other charities too.

Present your business case

Your board and senior management will want to understand why this needs investment and that takes a solid case for support. What extra resources, campaigns, training or infrastructure is needed? What will this achieve and how will you measure success? Looking at legacy market trends, average gift sizes and more, can you model what the returns could look like across a range of scenarios?

A robust business case was fundamental for the National Trust. It took it more than 12 months to develop and get the green light. This succeeded in securing the highest budget for legacies ever approved, enabling the charity to invest in legacy marketing,

increase its head count and draw in external expertise during the initial phase of a 10-year investment plan for in its legacy programme.

For Worldwide Cancer Research benchmarking and data analysis played their part. The charity benchmarked against other similar charities and discovered that its legacy income was considerably lower than where it should or could be. It was this insight, data analysis and forecasting, which helped it to estimate its legacy income potential and win board buy-in for legacy fundraising investment.

“The greatest risk may be failing to invest in legacy marketing”

At Capability Scotland, fundraising resources have been fairly limited in recent years, so legacies provided a potential opportunity. Elaine Shepherd, the charity's legacy lead, explains: “We knew that a more established legacy income stream could be a game changer for us, but we were pretty much starting from scratch. For us, it's not so much about pitching for a big financial budget; it's about having the buy-in to get things off the ground. We needed to secure the space, time and focus to build our knowledge and decide what steps to take, from setting up a free-wills scheme to developing legacy packs and a social media campaign.

“To do this, we needed to fly the flag for legacies internally, highlighting what a successful programme would enable us to do and that we simply couldn't afford to miss out on legacy income. We did our research and thought through the counter-arguments. We worked hard to ensure everyone really gets it, so that they can feel comfortable and equipped to have legacy conversations with supporters.”

When encouraging buy-in across your organisation, consider what decision-makers are likely to perceive as the risks of investing and your counter-arguments. The greatest risk may be failing to invest in legacy marketing and losing market share to charities which have kept up the momentum.



Exercises

Exercise 1

Make a note of key figures related to legacy income in your organisation:

Current legacy income	£
Projected legacy income	£
Legacies as a percentage of overall income	£
Annual legacy fundraising budget	£
Average number of pledges per annum	
Average pledge amount	£

Exercise 2

Key questions to discuss:

Where will resistance come from within your organisation for legacy investment?

Who can you identify within your organisation as allies to aid legacy investment?

What would be your counter-arguments?

What are the main benefits of investing in legacies compared with other income streams?

What type of investment do you need, eg financial, staff resources, time?

Case study

NSPCC

Legacies may well be the largest source of voluntary income at a sector level, but it doesn't always follow that it's easy to get organisational buy-in. And yet, when you think about the factors that distinguish organisations that succeed in legacy fundraising from others, having a culture and workforce that champions legacies is vital.

Everyone must play a part if a charity is to reach anywhere near its legacy potential. From community fundraisers and supporter care teams to the people on the front line, trustees and senior leaders, we can all be legacy-ready and enthuse supporters with the passion and drive to leave a gift in their will.

You might know how important legacies are, but you'll want to make sure others do too. At NSPCC, legacies are our second biggest income source (behind individual giving). They bring in around £20m for the charity. These numbers can be a powerful driver in conveying impact.

“You need to have a clear legacy proposition that everyone will engage with”

While the numbers convey the rationale, it's real, human stories from legacy givers and beneficiaries that express the passion and impact of those gifts. These personal perspectives are just as powerful for internal audiences as the would be for anyone thinking about leaving a gift. How better to build people's confidence in raising the topic of legacy giving than sharing stories about why people wanted to leave a gift and how lives have been impacted by those decisions?

Critically, you need to have a clear legacy proposition that everyone will engage with and understand. What will a legacy actually do? At NSPCC, we see





legacies as our guardian for children's futures for generations to follow. Once we articulate this, our teams really do get why they are so important and why they should play a role.

“We see legacies as our guardian for children’s futures for generations”

Essentially, if you want people to champion legacies, you need to make it as easy as possible, giving them the confidence and the tools to make it happen. At the NSPCC, we've created a legacy toolkit, which breaks down our messaging and offers practical tips for writing and talking about legacies, with suggestions of wording, imagery and more. It builds on our legacy proposition, linking to the organisation's main aims and therefore people's work goals.

The toolkit forms the basis of

training sessions and can be embedded into our induction process. We also give staff packs of forget-me-not seeds to share, with the messaging that legacy gifts will help future generations of children to thrive. These have been popular, helping to get legacy conversations started.

When it comes to organisational buy-in, having a supportive leadership team and trustees that recognise how important legacies are and their role in securing the charity's future, makes such a difference. This level of support makes it a great deal easier to get everyone else on side.

Setting up a working group of legacy champions can also help give people responsibility and clarity over what they can do to support legacies, whether it's sourcing case studies or highlighting legacies at the next event.

By **Laura Jacques**, legacies and tribute fundraising manager, NSPCC

Exercises

Exercise 1

Key questions to discuss:

What impact will a legacy have?

What is your legacy proposition?

What stories of legacy giving would you share?

Which organisations have a legacy programme you admire? Why?

Exercise 2

List five things you would put in your legacy toolkit:

1.

2.

3.

4.

5.

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- ☐ Identify your legacy proposition
- ☐ Devise toolkit for internal training
- ☐ Identify allies and legacy champions
- ☐ Prepare market stats and counter-arguments
- ☐ Curate stories of legacy impact
- ☐ Decide what investment you need

Notes:

Resources

Case studies:

Learn more about the legacy programmes of this section's case studies. Plus:

Capability Scotland

civilsociety.co.uk/legacyresources

Disability charity runs a comprehensive gifts-in-wills programme

Zurich

zurich.co.uk/news-and-insight/legacy-fundraising-at-small-charities

Useful case studies of small charities legacy programmes

Guidance:

Chartered Institute of Fundraising

tinyurl.com/hab58ex4

Downloadable guide making the case for investment in legacy programmes

Charity Choice

tinyurl.com/324bedr5

Five steps to getting your board behind your legacy strategy

Forbes

tinyurl.com/bdzcft8c

Why non-profits should consider a legacy giving programme, how to get started, including advice on getting senior level buy-in

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