

Back to the future – a new approach to legacy fundraising

Project 10. Legacies

Stephen George, April 2017

Reviewed by: Richard Radcliffe

The original brief

Legacies are a significant source of income for many charities, so it is important to retain the confidence of those who have already included charities in their wills and to encourage more people to do likewise. This project will look at the strengths and weaknesses of the current model of legacy fundraising and identify how we make sure that people feel encouraged to include charities in wills.

For senior management and trustee boards, this project will:

- *Show why they should create an internal culture where legacy giving is celebrated and encouraged.*
- *Help them to have the courage to invest in legacy giving and promotion.*
- *Show why emotion and identity is at the heart of legacy giving and how fundraiser's can use this responsibly to increase income in this area.*
- *Encourage them to review their probate experience to incorporate gratitude and not make it solely a legal process.*
- *Encourage them to leave a legacy to their organisation.*

For donors, this project will:

- *Increase opportunities for donors to feel unique, special and valued for making a gift in their will.*
- *Reduce the chance that they will be made to feel uncomfortable by the misuse or inappropriateness of poorly targeted legacy promotion.*
- *Reduce the chance that executors feel under-valued or under undue pressure from charities taking an overly legalistic approach in managing estates.*
- *Show they are appreciated through engaging communications and invitations to events, in the knowledge they are free to change their mind at any time.*

An introduction and overview

This CDE project 10 is about legacies, or gifts in wills. One of the great acts of giving. The approach in this project paper takes a clearly defined viewpoint.

That the donor's needs when met, make the difference and are the route to more gifts in wills.

In this project, we explore emotions, behaviour change, donor insight and the connections needed to inspire and engage supporters to make a legacy gift. We take a step back and look at the background to legacies and foundations thereof, the opportunities available to us and the way we approach raising money. We explore behaviour change, measures, and research and learning into legacies from a donor viewpoint. Finally, we take a look at donor-friendly insights - the donors and their families, the impact of the organisation, the fundraising techniques and the final process of probate.

The project includes four case studies: Remember a Charity, WaterAid, UNICEF UK and Cystic Fibrosis Trust. These showcase strategy, marketing and campaigns, and show how a donor experience can drive everything in an integrated approach.

Why 'Back to the Future'? Because we cannot embrace a new approach without inspiration from the past. Legacies are human. Fundraising understands that, but the challenge is to reassert the donor ahead of the driving forces and techniques by which we can so easily be dazzled. The past reminds us and inspires us, but it is in the here and now that we must act if we are to make a difference in the future. If we tune in to emotions and weave them into it the new technologies against a backdrop of the largest transfer of wealth ever, we can not only change the world, we can change donors' worlds.

As we look back to look forward, it is worth drawing on the words of the famous **George Smith** (founder of direct marketing agency Smith Bundy and one of the greatest writers on fundraising) who, in **Asking Properly**, said of legacies:

Just about the third of all income to British charities comes in the form of legacies. Yet we plod around the opportunity is if we undertakers ourselves, clad in black crêpe bands hanging from a tall hats. We need not just admit the scale of the legacy programme to shout about its joy, its promise, its inherent customer satisfaction. For it is the only donation that never reflects in the donors current account. It is the only donation most of us will ever make in thousands, tens of thousands, hundreds of thousands of pounds. It is the only donation that just about everyone can make

We need to talk about legacies everywhere. We need stop apologizing to raising the issue. We need to stop coughing nervously.

‘Back to the Future’ - a new approach to legacy fundraising for the 21st Century.

The opportunity before us

1. The **audience is growing older** and there will be many more of them in the next 30 years as the death rate increases
2. This is the **wealthiest generation** in human history
3. **Technology and the media** are making them accessible and open
4. They are increasingly **motivated to do good**, and leave a reminder of their time on earth
5. We are learning **about behaviour** in a way that can help meet donors on their terms, inspiring them to take action and leave a gift

In its simplest form, more people living longer with an increasing death rate and wealth over the next 30 years means more legacies if we inspire, engage and educate them about the benefits of leaving a gift to a favourite cause after bequests to friends and family. If we place the donor first, we can make a huge impact on the causes we all care about. If our purpose is to inspire the donor, we can triumph. If our purpose is to raise cash, we will fail.

How we organised this project and gathered insight

To draw together some inputs, ideas and contributions to shape some of the conclusions and recommendations in this paper, we have organised the collection of insights around four areas that can affect legacy fundraising from the position of the donor and provide insight to the fundraiser - **Donors, organisations, marketing and legacy administration.**

- (a) **The needs and experience of donors and their families** - seeing it from the donor's viewpoint
- (b) **Different organisations' cultures, capacities and experiences** - seeing it from the organisations viewpoint
- (c) **The legacy marketing and influence method and experience** - seeing it from the way in which fundraisers fundraise
- (d) **The probate experience and approach** - seeing it from the experience of the donor and the charity when families engage with a charity through probate (*Probate is the legal process whereby a will is "proved" in a court and accepted as a valid public document that is the true last testament of the deceased - Wikipedia*).

This was explored by asking participants to define:

- (a) What works, what inspires and provides a positive experience?
- (b) What prevents the delivery of an inspiring and positive experience?
- (c) How could fundraisers make this experience remarkable at present and in the future?

A survey was created using Survey Monkey, and was distributed via the Institute of Fundraising Legacy and the In Memoriam Special Interest Group, as well as on Facebook, Fundraising Chat, LinkedIn and via blog posts on UK Fundraising during the summer of 2016. Findings and feedback were collated and were used to distil the recommended actions. Specific individual heads of legacy fundraising were emailed as part of the IOF Special Interest Group and through Remember a Charity, which sent the questionnaire to its 160 members. The four case studies (set out as appendices) were identified as part of this.

The content in this report draws on the authors' experience and background knowledge, as well as on the perspectives from others (referenced throughout) to illustrate the thrust of the paper and to support the conclusions.

The project has identified 12 principles and 29 recommendations. The recommendations are listed as a straight set of 29 points that were created using the framework above - donors, organisations, marketing and legacy administration.

Principles to guide the development of a donor experience in legacies

1. A conversation is the way forward to inspire and engage supporters to leave gifts in their wills.
2. If we place charity and leaving a legacy as a compelling proposition and a new social norm alongside the donors transfer of assets to family and friends, we could transform giving and charitable impacts in the near future
3. There is a new opportunity to drive scale, reach and impact with donors and prospective donors through technology and social media,
4. With people over 50 forming two-thirds of the volunteer workforce, the spirit of giving and the motivation to give is something that charities must step up to if this opportunity is to be met.
5. If we are able to tune in to the behaviours of this generation, we will be able to design new ways to engage them that makes the opportunity before us real.
6. If we can convert just one per cent of non-charitable estates into charitable ones, we could raise another £78 million for charity each year.
7. Reconstructing a new social norm for gifts in wills needs to be a major focus of campaigning and experience, both as a sector and for each individual organisation.
8. We are in an era that is experiencing a shift from legacy marketing to legacy influence. This means shifting our measures to focus on conversations as the means to engage a wider audience and valuing consideration as much as commitment.
9. A shift to create engagement, inspiration and conversation will grow the market, educate those who still don't know about legacies and work in a way that is in keeping with the donor's behaviour.
10. To help everyone engage with legacies, we need to deliver knowledge, tools and confidence to all staff and partners to enable a conversation about legacies to begin.
11. The closer we are to the donors in terms of the way in which we engage them, the more likely we are to inspire them to act.
12. Bringing the probate experience under the wing of the fundraising and stewardship process changes the paradigm to an experience rather than a required process.

Twenty-nine recommendations to help create legacy programmes that enrich and enhance a donor experience

1. **Fundraising staff, volunteers and partners should start with insight and understanding of donors through data, evidence, and behaviour and, most importantly, by asking and listening to what donors want and need**
 - Gathering insight requires a deliberate process and mind-set
 - Donors value being asked - value is translated into a closer relationship
 - Ways to do this are through asking questions, seeking views, engaging at events, asking for help and demonstrating listening before telling
 - Basic insight can come from basic knowledge - gift, geography, age, and do on
2. **Focus on amplifying the personal insight, knowledge and behaviour of donors so they feel unique, special and valued**
 - Creating a stewardship programme that delivers a personal service can deepen belonging, commitment and loyalty
 - Many Legacy Fundraisers send hand-written and bespoke communications, and fundraising should invest in ways that enable this
3. **Use stories as the way to communicate, inspire and engage**
 - Deliberately engage donors with key questions such as ‘How did you first get involved?’ ‘Why did you first start to support us?’ ‘Tell us your story’
 - Creating a deliberate story collection process will encourage the collection and sharing of stories
 - Written copy should include stories from donors to help create social norms
 - Individuals should feel able to tell a personal story to help them make an authentic connection with donors
 - Training in storytelling should be a core part of fundraiser training and support
4. **Demonstrate the current impact on and outcomes from the charity and about its cause, as this reinforces confidence when donors consider the future impact of leaving a gift in their wills (see CDE project 19 - *Evidence of impact and effectiveness*)**

- Anxiety about how gifts will be used in the future needs reassurance in the form of clarity regarding how gifts are spent at present – constantly sharing and celebrating impact today and in the past should be part of on-going communications
- Using examples of recent or existing gifts being used to deliver a service or programme reassures and inspires those considering a gift

5. Building on existing connections or offering to connect with the work motivates and inspires gifts and reinforces relationships

- Events should be focused on the work and on impact more than on the mechanism of a legacy
- Finding ways to connect the donor to the cause and work build trust and deepen the relationship
- Invitations to events that showcase the work are ways to build contact and inspiration, even when donors can't or don't attend. The act of inviting has great value and must be part of the measures of success

6. Embrace the heritage of the organisation and the charities' founding and journey to today, however recent. This enhances the experience and value of a legacy gift and demonstrates organisational and donor trust and stewardship in the past, in the present and in the future

- Past personal experience and memories are key elements when looking at the heritage of a life or an organisation. Reflect this in messages that look to the past and the creation of the charity, through to the present and extending into a positive, optimistic future
- Finding founder stories help to reinforce passion and longevity. Messages and materials should reflect this mix

7. Thank donors who are considering making a bequest as much as those making a commitment –taking a step towards considering a legacy is a major one, and every step requires encouragement, gratitude and support (see CDE project 4 - *Thank you and welcome*)

- Move thanking the donor up the scale to acknowledge each step
- Legacies are a long-term consideration, and require the experience and journey to be positive and promote the next step

8. Build and deliver consistent messages. Communications that conflict with legacy messages undermine the legacy journey and the donor experience. If donors feel they are not valued or part of the solution, they will withdraw

- Create an organisational legacy messaging or brand book
- Use core language, phrases and words
- Require all communications with legacy messages to follow these guidelines regardless of the channel or audience in order to build consistency

9. Focus on long-term results through short-term activity. Donors and fundraisers need to understand the balance between these aspects because they are investing for the long term rather than to attain a short-term hit, even though the need may be urgent

- Future value can be stored and measured
- Long-term intent and aspiration are key parts of positioning for charities
- Short-term campaigns are about building a pipeline for the future

10. Inject emotion into wider messages. Emotion drives donor satisfaction and is the key building block to inspire supporters to give (see CDE project 6 – *The use and misuse of emotion*)

- Understanding how to connect with emotion should be a core skill of all fundraisers, particularly those delivering legacy programmes
- The wider supporting teams should be able to use the legacy messaging and ‘brand book’ to guide and support emotional content

11. The organisation’s style, approach and culture should do all it can to match the donor experience and messages as a core competence

- Staff should receive induction and training about legacies, the donor experience and needs
- Donor insight, understanding and motivations should be a core competency

12. Ensure donors receive feedback and dialogue to deepen trust and relationships

13. Legacy messaging and positioning should show that the entire organisation values legacies and the donors who are considering them

- Staff should be briefed on and trained about legacies
- Legacy gifts and stories should be shared across all staff

- Processes to engage with the public or donors should ensure there is a donor-friendly approach in place

14. Charities should support efforts to ‘normalise’ legacies by the way they behave towards staff, how they talk to and engage with the public and partners, and through active contribution within the sector

- Supporter services, helplines and all channels donors can use to call, write or email should be able to respond and engage with regard to legacies
- Organisations should ensure donor satisfaction and engagement are measured and monitored
- Organisations need to recognise that they can play a part in helping to create the atmosphere and environment in which legacies are considered accessible and valuable

15. Belonging to and contributing to a consortium campaign to promote legacies (Remember a Charity) can help to create an internal atmosphere of acceptance and normality regarding legacies, in addition to supporting and engaging a wider audience

- Donors like to see charities working together, and charities can leverage engagement by being seen as part of a wider campaign
- Contributing to the wider campaign provides practical internal opportunities to engage supporters in a helpful way and creates content that engages staff

16. Trustees should take responsibility for engaging and understanding legacy fundraising and be able to support the donor experience by engaging themselves in the organisation’s legacy programme and supporting the charity by leaving gifts in their wills (See CDE project 15 - *The role of trustee boards and senior managers*)

- Leadership and acceptance from the governing body helps to set the tone for how legacies are delivered and received by donors
- Trustees should sign up to a legacy strategy and approach
- Trustees should show personal leadership and commitment
- An annual legacy report on performance and donor satisfaction should be tabled

17. Organisations should measure the donor’s experience of legacies through a net promoter score collected as part of the legacy programme (See CDE project 3 - *Satisfaction and commitment*)

- Donor experience, if sought, sends a signal that the experience matters
- Measurement is focused on a good and positive experience, and the system and process stemming from this provides a further opportunity to engage supporters

18. The legal and probate processes of a legacy gift should closely follow or be part of the gift process in order for donors to have the same experience of giving, recognition and gratitude

- Where possible, legacy administration should be the responsibility of the Fundraising Department
- Written supporter-care policies and practises should be adopted for legacy administration
- Executors of estates and families of those who have left a gift should be valued and stewarded
- Donors require service and support in a consistent way that is in line with their view of the charity

19. All staff should have a basic understanding of the needs of legacy donors during induction to help to create a legacy environment in which donors are valued

- Donors can engage various parts of an organisation during legacy consideration - finance, communications, legal, fundraising. These staff should therefore be briefed and trained
- Having joined-up understanding and empathy can improve the experience at all touch points
- Along the journey, involve and engage staff in legacies to emphasise that everyone plays a part in making the donor feel good and valued

20. Ensure the organisation's brand projects the organisation's needs in a way that also reflects the needs and aspirations of the donor

- Charity brands must ensure they understand and connect with their audience and engage them on their terms rather than overlay organisational messages that do not connect
- Legacy messaging must sit comfortably with an organisation's future aspirations, messaging and brand values

21. Build a programme of events and face-to-face opportunities that reflect the personal nature of the gift

- Developing a marketing approach that offers donors the opportunity to meet face-to-face helps to inspire and engage donors
- The mere act of being invited can have far-reaching impacts on future legacy gifts
- Encourage face-to-face conversations whenever possible

22. Incorporate and integrate legacy messages alongside all fundraising activities, channels and supporter journeys to demonstrate the need, the normality and the value of legacies

- Incorporating legacy messages can help to normalise legacies, particularly when they are seen alongside other, familiar messages
- This is often described as a ‘drip drip’ approach and can help to normalise as well as to educate
- These can and should include newsletters, web pages, email, mailings, phone calls, PR and face-to-face encounters

23. Embrace technology as a key opportunity to inspire and engage donors in a positive way that supports donor engagement and builds relationships (see CDE project 11c - *Digital*)

- The use of social media such as Facebook Twitter and YouTube, amongst others, provides the perfect medium in which to engage, and should be a core part of an integrated legacy programme
- There is an opportunity to find innovative ways to engage supporters on their mobile devices

24. Emphasise the donor’s life and needs ahead of the organisation’s needs

- In making a legacy gift, we need to emphasise and focus on donors’ motivations
- Use phrases such as ‘you’ rather than ‘we’
- Make the donor the subject and voice

25. Whenever possible, bring together the fundraising, marketing, communications and legal aspects of legacy fundraising so that they operate in a holistic and donor-centred way (see CDE project 11 - *Communication with individual donors*)

- Bringing these together creates a shared purpose supported by a donor-led philosophy
- Build a common behaviour with a common donor-friendly journey and approach
- The donor sees a joined-up experience

26. Create a charter or statement of principles that is donor focused for everyone to work on around legacies

- A charter or statement that is focused on putting the donor first creates a platform and self-guiding rules for working together
- They can be seen by donors as encouraging, engaging and building trust

27. Build a welcome programme and stewardship model for donors' executors of wills (see CDE project 4 - *Thank you and welcome* and CDE project 16 - *A distinct service culture*)

- Engage donors in the experience. An executor has great influence, and this opportunity exists to influence them positively
- Drive the legal process alongside a 'customer' or 'donor' journey
- Acknowledging and helping families and executors builds trust

28. Involve and engage executors, solicitors and partners in the work of the charity and invite them to events

- Those involved in the probate process should be looked after and influenced as potential supporters and partners in a positive way
- They act as powerful allies and advocates if they have positive experiences

29. Ensure that all communication, including legal and probate content, is donor friendly

- Ensure that all communications use the learning and insight set out in earlier parts of this report
- Use donor-friendly language and provide a consistent experience



An overview of and background to legacy fundraising

The nature of true legacy

To leave a legacy is a natural human desire. Since the beginning of history, human beings have striven to pass on something of ourselves to future generations. We want to be remembered. We want to leave a mark, make a difference and help our families and loved ones do better. We are -wired to leave legacies.

This basic human emotion can be seen every day. From magnificent buildings spanning the centuries, to art, science, medicine, literature, history, even in street names, memorials and plaques, we see our quest to be remembered. But the truth is that, whilst this is a universal human feeling, for many, it manifests itself in more humble origins. Heirlooms, prized possessions and letters may be the sum of much of our worth – our assets and value. In a survey conducted by the **UK Campaign Remember a Charity** in 2015, over a quarter (28%) of the British public value the wisdom that loved ones have passed on more than they do money, keepsakes or property (<http://www.rememberacharity.org.uk/news/wise-words-leave-a-lasting-legacy/>). There are many who see themselves as having nothing of worth to pass on to the next generation. Many make no provision. But the emotional drive remains, even if the practical action does not.

A background to legacy fundraising

So what exactly is legacy fundraising?⁹ **Richard Radcliffe**, probably the world's most experienced Legacy Fundraiser, defined it in the following way:

‘A legacy is any gift (monetary or asset) left in a person’s will’.

It is, as Richard describes it, a gift. The mechanism for the gift is a will or the last testament of a person's life, which is only received when they have passed on. As such, it conjures up the internal conversations we all have about our mortality, but it is unique as it costs us nothing in life. In fact, it is all about life and has the greatest resonance with who we are as human beings.

The use of a will as a means to take care of affairs, direct actions once someone has passed on to look after your family and friends is a universal tool. Cultures and countries may enact their own interpretations in law and process but, essentially, we can all use wills as a vehicle to manage our departure and last wishes. The act of giving through a will is ancient and equally universal. It goes back a long way. **Redmond Mullin, in Foundations for Fundraising**, describes an appeal for Troyes Cathedral that received approximately 4% of income from legacies between 1389 and 1423 (**Foundations for Fundraising – Redmond Mullin 1995 ICAS Publishing**). Legacies are a trusted and time-honoured way to give.

Over time, as wealth has grown and spread to the many and not just the few, the act of giving via a will has become more widespread. In the 18th and 19th centuries, some of the great institutions and organisations we use and take for granted today were started by gifts in wills. Many hospitals, churches, charities and societies were formed. As an example, **Addenbrooke's Hospital** in Cambridge, one of the largest hospitals in Europe, was founded in 1766 with £4,500 from the will of Dr John Addenbrooke, a fellow of St Catharine's Colleges (https://en.wikipedia.org/wiki/Addenbrooke's_Hospital).

After the war, as the art and science of fundraising began to address the mass market, the process of fundraising for good causes developed new methods. Legacy Fundraising was no exception. In some parts of the world where the tax system encourages gifts, the route was planned giving by maximising tax advantages. For some, it remained a passive 'wait and see' exercise, almost like waiting for a lottery win or windfall. But for many, it transformed into a more deliberate action whereby charities reached out and encouraged, influenced and asked. In the 1970s and 80s, the advent of direct marketing by charities drove the development of mass marketing for legacies. However, to apply direct marketing to legacies meant addressing a fault line. Income from legacies was unpredictable and long term. How could a charity market an offer to an audience and not receive a return for a long time? To overcome this, charities created a direct-marketing approach to legacies. Firstly, an offer or enticement was made, often a will-writing pack or free guide. This recruited prospects. Secondly, the key metric became the revealing of the intent - what was to become called the pledge or pledgers. People who had told the charity that they had left a will.

ADVERTISEMENT FOR HELP THE AGED



Irene Handl means her work for the old and lonely to continue for generations to come

I'm not rich, but when I come to the end of my life I would like to know that some of my money was still working to make life better for old people. Too many of them suffer from loneliness and intolerable housing.

Help the Aged flats and day centres bring independence and friendship for years to come to those in great hardship. When a legacy is used for housing its value is multiplied twenty-fold because of loans available. So a modest legacy of £500 builds £10,000 worth of pleasant flat accommodation. A legacy can actually reduce liability for estate duty on large estates, and is free of all duty up to £50,000—providing it is made one year before death.

A helpful and interesting new booklet on reducing estate duty is now available on request from:

The Hon. Treasurer, The Rt. Hon. Lord Mayhew-King,
 Help the Aged, Room C8L, 8 Denman Street, London, W1A 2AP.

★ £150 names a flat in memory of someone dear to you.

This is a classic 1974 ad with a free booklet offered as an incentive

This approach became the main driver of growth for legacy fundraising by charities. Therefore, methods and techniques began to develop based on this marketing approach. This allowed charities to become proactive, seeking and finding potential donors, and making offers to solicit a response with a much higher volume or reach. For others, the approach to legacy fundraising remained simply rooted in warm face-to-face visits, regular contact and relationship building. A small audience, usually known to the charity or organisation, meant a gentler and more personal approach could be followed. Some charities combined both approaches using a marketing engine that uncovered interest and a team of relationship ‘advisors’ who built relationships through advice and support. In the 1970s, **Oxfam** developed a network of volunteers to visit supporters at home to discuss legacies, soon to be replaced by paid staff. This model was repeated by a number of large charities. Today, there are many examples of teams of advisors supporting a charity’s legacy marketing.

Over time, however, there has been a change to this old model. Providing advice on writing wills to acquire new interest is less important as a tool to attract support, largely because the information is now widely available and the value thereof has been lost. Charities still provide information as a mainstay, but the means to engage and uncover support has become more cause-led. In the second pillar of the model, the concept of pledges has been broadened to embrace enquiries (this is discussed further in **A donor-led viewpoint**).

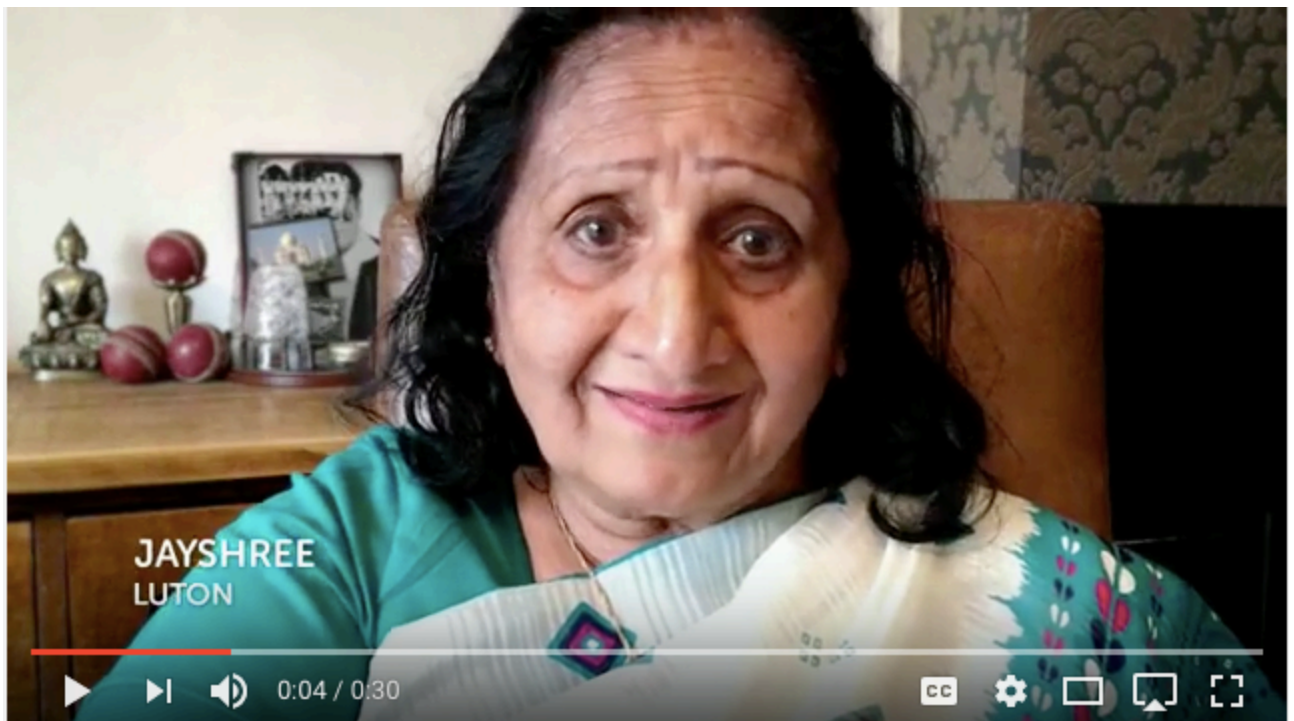
As we look back, it is worth quoting the words of the famous **George Smith** who, in **Asking Properly**, said of legacies:

Just about the third of all income to British charities comes in the form of legacies. Yet we plod around the opportunity as if we undertakers ourselves, clad in black crêpe bands hanging from a tall hats. We need not just admit the scale of the legacy programme to shout about its joy, its promise, its inherent customer satisfaction. For it is the only donation that never reflects in the donors current account. It is the only donation most of us will ever make in thousands, tens of thousands, hundreds of thousands of pounds. It is the only donation that just about everyone can make

We need to talk about legacies everywhere. We need stop apologizing to raising the issue. **We need to stop coughing nervously.**

Legacy fundraising today

In the past 15 to 20 years, legacy fundraising has embraced new forms of reach and engagement. The rise of digital platforms and other media, namely TV, video and the use of the telephone have increased and developed engagement. In the UK in 2001, a consortium of charities formed a campaign group called **Remember a Charity** (<http://www.remembercharity.org.uk>) following the **Leave a Legacy USA campaign** (<http://www.leavealegacy.org>). Remember a Charity established a TV-led approach, with a combination of channels to raise awareness and create a bigger legacy market. In 2007, the campaign shifted its emphasis to changing behaviour. Bigger charities have and are driving TV-led campaigns, and innovation in terms of legacies is beginning to flourish. As an example, take a look at this TV advert for **Cancer Research UK**.



You can view the video here <https://youtu.be/QMwKLG4qPB8>

All over the world, charities are exploring how to reach, inspire and engage new support, but the approach is beginning to embrace the softer, more conversational and influencing approach rather than the overly direct response route. Legacies require a combination of both, but the best way to grow legacy income in the future may be by a more donor-friendly engagement that is informative, inspiring, helpful, uplifting and simple.

A conversation is the way forward to inspire and engage supporters to leave a gift in their wills.

The opportunity before us

We are now at a crossroads in terms of legacy fundraising. As we pause and take a look at this moment, we can see that there are five major drivers of change that are pointing us towards this opportunity for legacies.

1. The **audience is getting older** and there will be many more of them in the next 30 years as the death rate increases
2. This is the **wealthiest generation** in human history
3. **Technology and media** are making them accessible and open
4. They are increasingly **motivated to do good**, and to leave a reminder of their time on earth
5. We are learning **about behaviour** in a way that can help meet donors on their terms, encouraging them to take action and leave a gift.

This is an opportunity to inspire and change a generation that has the power to pass on such wealth that it could transform the landscape of the many causes and problems we, and donors, want to solve. It is the one technique in the entire sector that has the potential to raise more than any other.

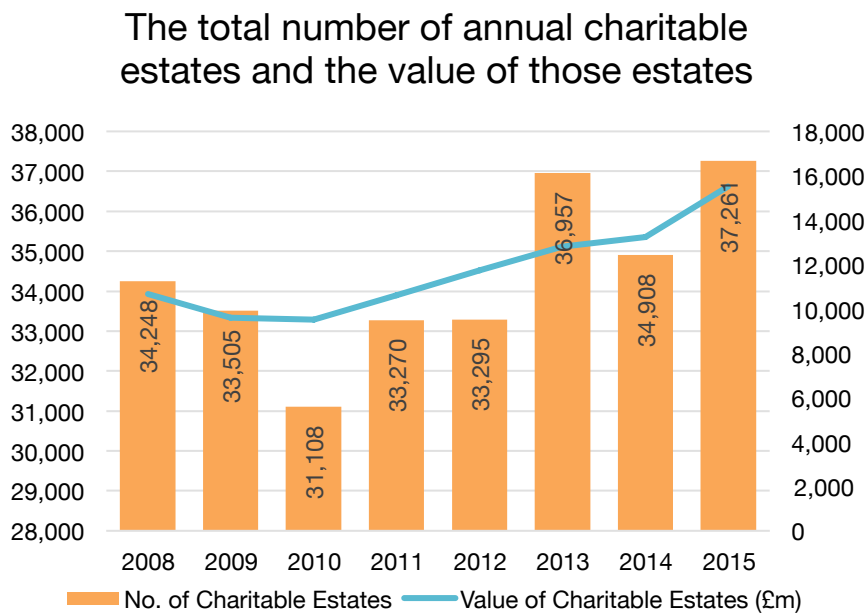
Stephen Pidgeon, UK Fundraising expert, noted that a well-executed bequest-marketing programme can raise far more money than can a major gifts programme.

Let's take a look at the current reality of legacy fundraising.

- Legacy income across England and Wales grew 5% from 2013/14 to 2014/15 (from £2.193 billion to £2.293 billion)
- The 2015 (calendar year) saw the highest number of charitable estates on record for England, Scotland and Wales - 37,261. This is an increase of 7% from the previous year
- Scotland has seen a decline in the number of charitable estates (-12% over the past two years) and bequests, while England and Wales have seen an increase. The decline is most prominent in West Scotland. Although the South East of England is responsible for the highest proportion of legacies (almost 12%), it is East and Central England that are seeing the most growth (up by 10% over the past year).
- The value of charitable estates has risen consistently since 2011, with a 17% rise from 2014 to 2015
- While health charities attract most bequests, there is some regional variance. Animals are the next most popular cause in England and Wales, while it is religion in Scotland
- 14.6% of the value of charitable estates (donor wealth) went to charities

The typical profile of a legator:

1. Is female
 2. Aged 76 when she writes her will
 3. Dies when she is 83
 4. Lives in the South of England
 5. Leaves three charitable bequests in her will
- 35% of charitable wills contain just one charitable bequest, and the most popular cause receiving sole bequests is places of worship
 - In 2007, just 12 per cent of those who had died having made a will left a charitable gift. In 2014, this had risen to 17 per cent.
 - Source (<http://smeeandford.com>)



Source: Smee and Ford

It is important to recognise that income from legacies goes up and down in line with how the economy performs – house prices, inflation and so on. Overall, it is difficult to measure legacies based exclusively on income but, in the long term, it is clear that we are steadily raising more money overall. The key focus is the number of people considering leaving a gift and the number actually doing so. In this case, it is clear that growth is taking place. If this upward curve accelerates, albeit more slowly than we would like, we will have a tremendous opportunity. Moreover, these five drivers will help such an acceleration greatly.

The first driver is the increasing number of people who will live longer. The baby boomer generation has just started turning 70. These figures come from the **UK Government website**:

- The UK population is projected to increase by 9.7 million over the next 25 years from an estimated 64.6 million in mid-2014 to 74.3 million in mid-2039
- The population is projected to continue ageing, with the average (median) age rising from 40.0 years in 2014 to 40.9 years in mid-2024 and 42.9 years by mid-2039
- By mid-2039, more than 1 in 12 of the population is projected to be aged 80 or over

According to the **UK Parliament**,

The number of people of ages 65 and over is projected to increase by 23 per cent from 10.3 million in 2010 to 12.7 million in 2018. Growth in this age group is projected to continue for the foreseeable future, with the 65+ population expected to reach 16.9 million by 2035.

Source

researchbriefings.files.parliament.uk/documents/SN03228/SN03228.pdf.

In its simplest form, more people living longer with an increasing death rate and wealth over the next 30 years means more legacies.

The second driver is the **wealth** of these people. **PWC** estimated that

36% of the UK's total liquid wealth—£1.7 trillion—will be in the hands of retirees over the next ten years.

However, the top 10% of Britain's richest households now own almost half of the country's £11.1 trillion total private wealth. **The Office for National Statistics (ONS)** said the average household was worth £225,100 in 2012-14. Thus, whilst wealth has grown, it is concentrated. Overall, this increasing wealth, with a larger volume of people, despite pressures on their finances, presents an opportunity to become part of the wealth transfer that is likely to take place.

If we place charity and leaving a legacy as a compelling proposition and a new social norm alongside the rightful transfer of assets to family and friends, we could transform giving and charitable impact in the near future.

The third driver is **technology**. According to a report in the **Huffington Post** via the **Pew Research Centre**,

Internet use among those 65 and older grew 150 percent between 2009 and 2011, the largest growth in a demographic group. Furthermore, their 2012 study showed that of those that go online, 71 percent do so daily and 34 percent use social media. The elderly use these tools to bridge the geographic gap between them and their loved ones far away and as a way to re-connect with friends from a far off time. Studies show that the internet has become an important portal for reducing isolation, loneliness and other depressive symptoms.

According the **UK's Telegraph**,

One in four over-65s are now using social networking sites such as Facebook and Twitter, as older people increasingly turn to the internet to share family photographs and keep in touch with loved ones'. The Telegraph dubbed them instagrans, after the photo-sharing website, Instagram. The proportion of over 65s who say they are active on social networks grew by more than 50 per cent last year, according to the Office for National Statistics, rising from 15 per cent to 23 per cent. While nine out of ten under-35s are on social media, younger browser numbers have plateaued; the ONS said that use of the sites was rising fastest amongst the middle-aged and elderly, and had "become part of many adults' everyday lives". Source (<http://www.telegraph.co.uk/news/2016/08/04/one-in-four-over-65s-use-social-media-after-massive-rise-in-inst/>).

This is the new norm: Driving a new form of engagement with donors and prospective donors through technology and social media.

The fourth driver is the **motivation** to do good and to be remembered. According to **The Chronicle of Philanthropy in the US**, a study by consulting company **Age Wave** in partnership with **Merrill Lynch Global Wealth Management** said retirees are expected to donate about \$6.6 trillion in cash and \$1.4 trillion in volunteer services during the next 20 years as baby boomers retire. The study also found that baby boomers are 49 per cent more likely to make an effort to find out how non-profits use their money before they decide to donate than were their parents' generation, and 44 per cent of them wanted to direct how their charitable gifts were used, compared with only 15 per cent of their parents' generation. (<https://www.philanthropy.com/article/Baby-Boomers-Poised-to-Give-8/233873>).

With people over 50 forming two-thirds of the volunteer workforce, the spirit of giving and the motivation to give is something that charities must encourage if this opportunity is to be actualised.

The final driver is **behaviour**. In terms of legacies, we are already seeing a shift among those considering leaving a gift in their wills to an increase in those who actually have. In addition, we have seen other shifts in behaviour, particularly amongst baby boomers, who want choice and value, transparency and engagement, and who use on-line resources to research and engage. Combine these behavioural forces with the previous generation that remains a stalwart of giving, and we have the opportunity to engage in new ways that reflect this. However, there is evidence that we have not engaged baby boomers properly. **NFP Synergy's report Facts and Figures - Baby Boomers, Charities, and an Ageing Population**, said:

Currently, the generation preceding baby boomers - those born in 1945 or earlier - donate more to charitable causes than any other age group (Campbell: 2013). These 'mature donors' give 34% more than boomers, with the latter giving an average of £153.28 a year to 5.4 different causes, and mature donors giving an average of £211.30 to 5.3 different causes (Blackbaud, 2013). There has been a substantial failure to engage the baby boomer generation.

NFP Synergy added,

Charities simply can't afford to fall out with boomers. As this generation retires, men and women over the age of 50 hold 80% of the UK's wealth and those over 60 contribute more than half of all charitable donation (Pudelek, 2014). Given the increased pension freedoms and possibility of tax-free lump sums, Future Foundation predicts a potent injection of liquid spending into the UK economy, with around 300,000 people eligible to take advantage of the new provisions this year alone (2015).

If we are able to tune in to the behaviours of this generation, we could design new offers and engage them in a way that actualises the opportunity we have.

These five drivers present a tremendous opportunity. So what does the future hold?

Smee and Ford, a UK-based provider of trusted legacy information for over 100 years, predicted the following:

If we consider that charitable estates were worth £15 billion in 2015, and legacy income was £2.2 billion, we can calculate that 14.6% of the net worth went to charities. Applying this percentage to the total estate values for non-charitable estates (i.e. those that do not contain a gift to charity), legacies could potentially be worth another £7.8 billion to the sector’.

If we can convert just one per cent of non-charitable estates to charitable, we can raise another £78 million for charities each year.

Legacy Foresight, the UK’s foremost analyst of the legacy and in-memory sector, stated in its **2016 Legacy Monitor**:

Our latest forecasts suggest that overall legacy market growth rates will average 2.6% p.a. over the next 5 years - this time last year we were predicting 4% p.a. By 2020, UK legacy giving will be worth £2.91bn; or to put it another way, over the next five years UK charities will receive £13.6bn in legacy income. However, once the higher inflation has been taken into account, real growth will be just 1% a year.

The key opportunity is to inspire and engage more people – we need a new level of reach. Economic factors aside, the sheer number and wealth of this new generation and their motivation, behaviour and ability to engage in many new ways presents a combination and challenge to which we must rise.

At the heart is the donor’s needs. We need to deliver to that.

Putting the donor-led experience at the heart of legacy fundraising growth

A donor-led viewpoint to change behaviour

What do donors need and want in order to make the giving of a gift in their wills meaningful, normal, joyful, easy and rewarding?

This question is a critical one if we are to unlock the potential of legacies to fund good causes. Given that there are so few people relative to the total population who leave a gift in their wills, the challenge is to identify why this number remains so small and to find ways to work together to build a better and more insight-driven legacy proposition and experience. Considering with the insight and needs of a donor should be the starting place for any fundraiser, charity or organisation, but we know this isn't always the case in practice, although intentions may be good. Being able to meet donors' needs to deliver our offer and opportunity requires two levels of insight:

1. **Donor audience insight** that is relevant to all charities and is appropriate for most donors and potential donors
2. **Specific cause or organisational insight** relating to the proposition, offer and language used by an individual charity to make sure it connects with its specific audience and, where possible, with individuals.

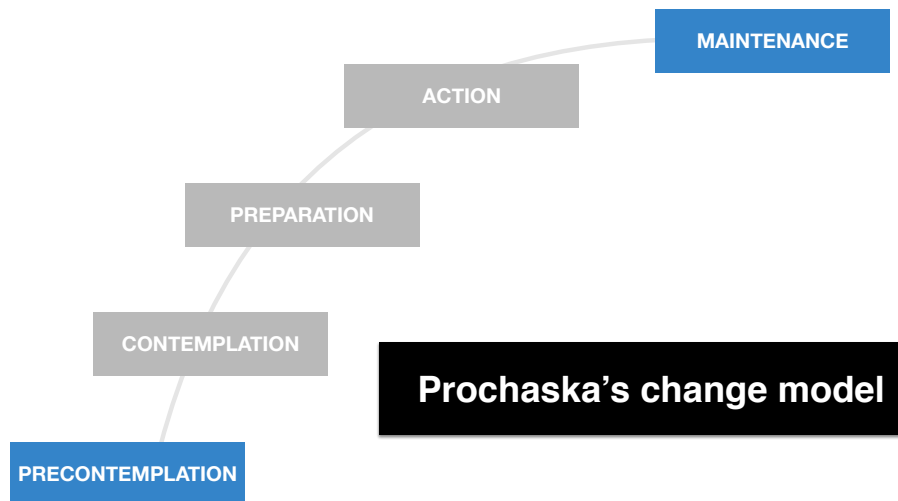
We run the danger repeating research that tells us the same insights about the audience in the guise of trying to find unique insights into individual causes or organisations. Some things are universal truths and we need to develop ways to build approaches and innovate building on those universal truths and insights to establish a platform.

In recent years, we have seen a movement develop around **behavioural science** (*a branch of science (as psychology, sociology, or anthropology) that deals primarily with human action and often seeks to generalize about human behavior in society- <https://www.merriam-webster.com>*). This approach was used to develop **Social Marketing** (*Social marketing is an approach used to develop activities aimed at changing or maintaining people's behaviour for the benefit of individuals and society as a whole - <http://www.thensmc.com>*). Social Marketing combines ideas from commercial marketing and the social sciences as a proven tool for influencing behaviour. These influences were drawn upon in 2007 when the UK Campaign consortium, **Remember a Charity**, shifted its strategy towards influencing behavioural change.

At the heart of this shift was understanding where supporters and potential supporters were in the decision-making process. To support this, the campaign adopted a model called

Prochaska's change model

(https://en.wikipedia.org/wiki/Transtheoretical_model)



Much of the challenge of legacies is to reach the vast majority of the potential market that is actively considering a legacy gift. Our marketing thrust has been towards action, whereas many approaches are not. We needed to recognise that we had to focus on getting people to consider leaving a legacy from a place in which they probably had not.

In order to embrace this approach, **Remember a Charity** sought to identify the barriers, challenges and opportunities for leaving gifts in wills, and commissioned a research study of the will-writing public. This was carried out by **TNS** (<http://www.tnsglobal.com>), one of the largest research agencies worldwide, which provides actionable insights to help make impactful decisions. The agency interviewed a large sample of 2000+. They sought to identify the willingness of and barriers to the 40+ audience considering leaving a gift. The final report stated:

The qualitative research highlighted the receptiveness of the legacy message to the charitably-minded public once it was salient and normalised. The quantitative findings supported this, with over 50% of the sample (people aged 40+) indicating some degree of receptiveness.

Those who give charitable legacies are currently perceived as unusual, in some cases, for negative reasons. Legacy givers were associated with the rich and famous or eccentric, and not deemed to be 'everyday' people. Reconstructing this social norm needs to be a major focus of campaigning.

There are deep emotional and biological drivers to motivate the creation of a will and to ensure the survival, protection and comfort of dependents. It is viewed as the social norm to provide for dependents and not the social norm to leave a charitable legacy. Any campaign strategy will need to recognise the rule 'family first, charity second'. Both the qualitative and the quantitative research highlighted that this rule is prevalent even for those without children.

The report established that barriers, once identified and addressed, opened up the way for the wider public to engage with and actively consider a legacy; as the report states,

Reconstructing this social norm needs to be a major focus of campaigning.

These barriers defined that which was in the way. See the summary chart below. When addressed, we must champion the factors that donors might then want to embrace.

Barriers to legacies need to be understood

Family first	'For me, and I would expect lots of people, its family first, charity second'
Lack of salience first	Rarely discussed, never thought about it <i>"It just hasn't occurred to me - never thought about it"</i>
Not the norm	Perception its not for 'everyday people' Media drives view that its for 'eccentrics' and 'people with a grudge against their children
Has to be large	Strong perception legacies are large amounts <i>"You only ever hear about large one's - never small ones"</i> Often associated with celebrities or very wealthy
No flexibility	Didn't know you could leave an amount or % or that it could be changed - fear of changing circumstances

TNS Survey for Remember a Charity 2007

Focusing on behavioural change has allowed significant changes to take place in the last 10 years. Most charities are clear that family and friends come first, and this has helped to change the public's perception of having to choose between family and a charity, to considering leaving something to both. Many charity campaigns are focused on the donor and on helping them see donors who are 'just like them' and who have given a gift. Many are creating campaigns that are softer in their approach, less technical and focused on the behaviours and motivations of prospective supporters. But there is much to do to create that social norm the research has identified

This approach goes to the heart of what we consider to be our core method for raising money through legacies.

We are in the era of a shift from legacy marketing to legacy influence. This means shifting our measures to focus on conversations as the means to engage a wider audience and counting consideration as much as commitment.

This means normalising legacies so that everyone can understand and take part. It means opening up the prospect of a legacy to a large audience that is not currently considering one. It means measuring consideration as much as commitment.

Short of a culture change so that the charitable legacy will in time become socially acceptable and even desirable the measure of a person's humanity and concern for others. It has to become the right thing to do. Such a change will only be achieved if we can work at it together.

Ken Burnett Relationship Fundraising

This approach should see a shift from the emphasis on legacy marketing to a new emphasis on legacy influence. Marketing and the tools used will remain at the heart but, by adopting a focus on changing behaviour, for that is what we must do if we are to persuade more people to not only consider leaving a legacy but also to take action, we need to change our approach to influencing people, creating a social norm, talking about it and inspiring supporters to help through a gift in their will rather than feeling 'marketed' to by providing a wonderful, uplifting experience that encourages everyone wants to bequeath a gift.

The approach used in this report and the basis for these conclusions

To draw together some inputs, ideas and contributions that shaped some of the conclusions and recommendations in this paper, we have organised the collection of insights around four areas that can affect legacy fundraising from the position of the donor, and which provide insight into the position of the fundraiser – **donors, organisations, marketing and legacy administration.**

- (d) **The needs and experience of donors and their families** – seeing it from the donor’s viewpoint
- (e) **Different organisations’ cultures, capacities and experiences** – seeing it from the organisations’ viewpoints
- (f) **The legacy marketing and influence method and experience** – seeing it from the ways that fundraisers fundraise
- (g) **The probate experience and approach** – seeing it from the experience of the donor and of the charity when families engage with a charity through probate (*Probate is the legal process whereby a will is "proved" in a court and accepted as a valid public document that is the true last testament of the deceased – Wikipedia*).

This was explored by asking participants to define

- (h) What works, inspires and provides a positive experience?
- (i) What prevents the delivery of an inspiring and positive experience?
- (j) How could fundraisers make this experience remarkable at present and in the future?

A survey was created using Survey Monkey, and was distributed via the Institute of Fundraising Legacy and the In Memoriam Special Interest Group, as well as on Facebook, Fundraising Chat, LinkedIn and via blog posts on UK Fundraising during the summer of 2016. Findings and feedback were collated and used to distil the recommended actions. Specific individual heads of legacy fundraising were emailed as part of the IOF Special Interest Group, while Remember a Charity sent its 160 members the questionnaire. The four case studies were identified (presented in the appendices) as part of this.

The content in this report draws upon the authors’ experience and background knowledge, as well as on perspectives from others (referenced throughout) to illustrate the thrust of the paper and to support the conclusions.

The following sections relate to the four areas (the donor, the organisation, marketing and legacy administration), beginning with an overview of and perspective on each, followed by a series of defined recommendations and a narrative to explain.

The experiences and needs of donors and their families

At the heart of the challenge of providing the best experience are the primary wishes of the donors and their families. For donors to feel comfortable discussing legacies, they must know, feel and understand that a charity is not in competition with their families. A charity is a partner and a potentially welcome solution to a donor's needs. In the past, charity marketing messages have created a sense of conflict with the natural instinct to give to family first; thus, it is essential that charities to market themselves in a way that puts family first, even though some supporters may not have families, as the instinct is still there.

If the fundraising model used to engage supporters focuses solely on revealing intent, it is failing. What is perhaps worse, it is misunderstanding the donors' wishes, fears, anxieties and understanding of legacies. As a result, no conversation, intention or action may have been disclosed to the charity receiving a legacy gift. People are naturally private, particularly in a climate in which leaving a charitable bequest is not a social norm. Unexpected gifts appearing from an unknown donor are a mainstay of legacy fundraising. For many, it constitutes the majority of their gifts, and it often helps to understand this. One way is to count the sources systematically:

- a) Gifts from people you have never heard from and who are not known to you
- b) Gifts from people you know or who are on your database in some way, but have never disclosed or discussed an intention to leave a gift
- c) Gifts from people you know who have previously disclosed that they are either considering a gift, planning to give a gift, or have already done so.

It is important to recognise that all gifts received are from supporters. Because someone is not known to you does not indicate a lack of support, but shows the donor has chosen not to tell you about their support or has not disclosed by his or her behaviour. What of the donor who watches you from afar with admiration, crossing the street to put cash in a street collection tin for you?

Most gifts are the product of influence rather than direct response. But, when we do have a direct response and donors have revealed their intent, we need to make sure we step up to an even higher level of stewardship. Data from the **NCP G 2001** collected by **Adrian Sargent** reveal that only 25% of donors who had informed the charity of their bequest intentions experienced being treated any differently as a consequence. He concluded that these pledgers are placing greater emphasis on the quality of service they receive and, in this case, we fall short of serving their needs.

The question to ask is, why don't people reveal their intent? What prevents a conversation? (see **TNS Research** in the overview section). Could it be that our pursuit of a 'pledge' or more simply a 'please tell us' has clashed with the natural tendency towards privacy?

For many supporters, a gift in a will is something that takes time to consider, to reflect on and on which to act. A minority may move through these stages more rapidly, usually due to personal circumstances but, for most, the process takes time. Prochaska's model, as described previously, provides an insight into the stages used to make decisions.

This model is used to inform actions taken in social campaigns to change behaviour, and has been used to illustrate a legacy approach at Remember a Charity, the NSPCC and others. Fundraisers should seek to focus on driving a great experience by recognising the longer decision making process and creating a broader, longer-term consideration to action approach that engages and inspires. The 'pledge' will remain as a natural cornerstone, which is donors revealing that they have left a gift, but the volume and influence is greater in the softer majority of donors who are considering but haven't yet acted or revealed intent.

A shift to create engagement, inspiration and conversation will grow the market, educate those who still don't know about legacies and work with the grain of the donor's behaviour.

How the donor might behave and how can we use insight to improve experience

It would be wrong not to be absolutely explicit about the role and understanding of emotions in legacy fundraising. The emotional connection when considering a gift, as we have described, is powerful when thinking of a legacy. **David Love, the Canadian Godfather of Good**, (WWF and Agents for Good), who has championed donor-led legacy fundraising for 50 years, describes the *'the story of yourself'* in a legacy.

Much has been written about the power of emotion, and this will be a thunderous roar through most of the project papers in the Commission on the Donor experience for many. As a reference to draw these together, and at the heart of thinking about how these can be used in legacy fundraising, the following are links to four resources pertaining to the art and science of emotion.

1. **The emotional brain - Effective fundraising it seems is all in the mind** - Ken Burnett <http://www.kenburnett.com/Blog26EmotionalBrain.html>
2. **The use and misuse of fundraising** - Dr Kiki Koutmeridou <http://sofii.org/article/the-use-and-misuse-of-emotion>

3. **Adventures in emotional space** - Fundraising is inevitably emotional but are fundraisers? - Ken Burnett
<http://www.kenburnett.com/Blog68adventuresinemotionalspace.html>
4. **The positives and negatives of emotional fundraising** - Jenny-Ann Dexter
<http://sofii.org/article/cde-project-6-the-use-and-misuse-of-emotion-section-4-emotions-and-donors>

In Ask - How to ask anyone for any amount for any purpose, Laura Fredricks has identified the following characteristics of donors who leave a legacy.

1. They know about the organisation and its mission, priorities and direction
2. They have confidence in the leadership
3. They are satisfied with the organisations fiscal management, for they believe they gift will be perpetuated well into the future and that they will have a long-lasting legacy through the organisation
4. They give when the time is right rather than economically
5. They may have supported the organisation in the past with small gifts, but a number of them will have no history of giving to the organisation
6. They possess the assets to give without compromising their economic comfort level
7. They want to ensure that their loved ones are taken care of in conjunction with the planned gift
8. They tend to make several plan gifts over a lifetime
9. They usually consult tax advisors, financial planners, attorneys, colleagues and family members before making the gift.

These help to attain an insight into the donor who is making a planned gift - a legacy. In their 2003 **AFP report Identification, Death and Bequest Giving, Adrian Sargent and Jen Shang** identified that donors have five motivations for giving a gift (not in order of priority):

1. Family need
2. Tax
3. Need to live on
4. Spite
5. Making a difference

Some aspects may seem obvious, but it is worth reminding ourselves that simple things done well can often outperform new and innovative things. We all know that stories are critical to engaging and inspiring donors emotionally. In terms of legacies, this is vital. As an illustration, in 2014, **Russell James, professor at the Department of Personal Financial Planning at Texas Tech University** conducted a study to uncover the right legacy messages; he found that:

‘Using living donor stories outperformed all other messages for 40 of the 40 charities (studied)’
- Russell James.

If we combat the barriers that prevent the understanding of the needs and behaviour, we can make great strides in creating a better experience. In the section on organisation and marketing, we will explore donor insight further.

Therefore, through the exploration of best practice, fundraisers, insight and some donors’ feedback, the following principles and actions should be promoted to improve the donor experience and to give legacy fundraisers the best opportunity to meet and exceed donors’ needs.

1. Fundraising staff, volunteers and partners should begin with insight into and understanding of donors via data, evidence, and behaviour and - most of all - by asking and listening to what donors say they want and need.

- Donor experience can be learnt, understood and replicated. Obtaining insight requires a deliberate process and mind-set of learning
- Experience and engagement can be enhanced significantly by seeking the input, opinions and views of donors
- Donors value being asked - value is translated into a closer relationship.

2. Amplify personal insight, knowledge and behaviour so that donors feel unique, special and valued

- Legacy fundraising has long implemented a model in which face-to-face visits are encouraged. However, as time passes and the emphasis is on engaging a wider audience, the nature of the gift, the complications and the special nature thereof demonstrate a quest to retain and enhance a personal relationship
- Legacy fundraisers show a high awareness of the need to drive personal communications; this needs to form the backbone of contact whenever possible
- The deliberate recording of age, name, background story, birthday and any other insight helps build personal interactions
- Many Legacy Fundraisers send hand-written and bespoke communications and invest in staff structures that enable this.

3. Use stories as the way to communicate, inspire and engage

- We know that donors feel their experience is closer and more emotionally engaging when they hear of or are part of a story
- However, Legacy Fundraisers have struggled to make the most of this. A culture of storytelling helps to generate stories and to engage donors by asking key questions such as ‘How did you first get involved?’ ‘Why did you first start to support us?’ ‘Tell us your story’
- Creating a deliberate story collection process encourages the collection and sharing of stories
- Sharing stories frequently helps to motivate and inspire. All channels can and should carry stories.

4. Demonstrate the current impact and outcomes of the charity and about its cause, as this reinforces confidence when donors consider the future impact of a gift in their wills.

- Anxiety about how gifts will be used in the future needs reassurance in terms of clarity concerning how gifts are spent at present
- To support future confidence, showing the impact that current gifts in wills are making is critical
- Using examples of recent and existing gifts to deliver a service or programme reassures and inspires those considering a gift.

5. Building on existing connections or offering to connect with the work motivates and inspires gifts and reinforces relationships

- Events should be focused on the work and the impact thereof more than on the mechanism of a legacy. In previous years, the events were legacy events. Current practice focuses on an event that is about the work with a legacy element included and stated openly
- Finding ways to connect the donor to the cause and the work builds trust and deepens relationships
- Invitations to events are ways to increase contact and inspiration even when donors can’t or don’t attend. The act of inviting has great value and must be part of the measures of success.

6. Embrace the heritage of the organisation and the charity’s founding and journey up to the present, however recent. This enhances the experience and value of a legacy gift and demonstrates organisational and donor trust and stewardship from the past, in the present and into the future.

- Past personal experience and memories are key elements when looking at the heritage of a life or of an organisation. Reflect on messages that look to the past and the creation of the charity, at present and into a positive, optimistic future
 - Finding founder stories help reinforce passion and longevity. Messages and materials should reflect this combination.
- 7. Thank donors who are considering making a bequest as much as those making a commitment –taking a step towards considering a legacy is a major one, and every step requires encouragement, gratitude and support.**
- Move thanking the donor up the scale to acknowledge each step
 - Legacies are a long term consideration and require the experience and journey to be positive and help spur a next step
- 8. Build and deliver consistent messages. Communications that conflict with legacy messages undermine the legacy journey and the donor experience. If donors feel they are not valued or part of the solution, they will withdraw.**
- Create an organisational legacy messaging or brand book
 - Use core language, phrases and words
 - Require all communications with legacy messages to follow these guidelines, regardless of the channel and the audience, in order to create consistency
- 9. Focus on long-term results through short-term activity. Donors and fundraisers need to understand the balance between these aspects because they are investing for the long term rather than to attain a short-term hit, even though the need may be urgent**
- Future value can be stored and measured
 - Long-term intent and aspiration are key parts of positioning for charities
 - Short-term campaigns are about building a pipeline for the future
- 10. Inject emotion into wider messages. Emotion drives donor satisfaction and is the key building block to inspire supporters to give**
- Understanding how to connect with emotion should be a core skill of all fundraisers, particularly those delivering legacy programmes

- The wider supporting teams should be able to use the legacy messaging and ‘brand book’ to guide and support emotional content

11. The organisation’s style, approach and culture should do all it can to match the donor experience and messages as a core competence

- Staff should receive an induction and training about legacies and the donors’ experiences and needs
- Donor insight, understanding and motivations should be a core competency

12. Ensure donors receive feedback and dialogue to deepen trust and relationships

The organisation’s culture, capacity and experience

Creating a positive experience for legacy donors or for those enquiring about becoming such donors requires a much wider contribution and understanding from the organisation. From the top to the very bottom of an organisation, legacy fundraising needs three factors to be in place:

1. Permission, authority and leadership to engage and embrace legacies rather than simply relying on the legacy department
2. Messages and positioning that demonstrate the organisation needs, wants and appreciates legacies
3. Systems, processes and training to empower people to act, respond to donors and support the experience

In their 2003 AFP report on Planned Giving ‘Identification, Death and Bequest Giving’, Adrian Sargent and Jen Shang wrote that legacy donors want to see three things in an organisation to ensure continued support.

1. Performance professionalism
2. Communication quality
3. Programme quality

Donors expect to see organisations fulfil all three aspects. The donor’s experience and relationship is usually with the cause, followed by the organisation, and this organisational relationship, trust and belonging must not be underestimated. It is important this is understood by the entire organisation. As an analogy, when a consumer engages with a well-known department store, the purchase may involve the on-line experience, the store experience and the warehouse experience. The consumer sees one body, not three. This must be the same for the donor and fundraising, particularly with regard to legacies, if the experience is to cut through. Damage a relationship carelessly and you damage the potential gift.

Much of the solution to this challenge is leadership; organisational, department and team wide, and personal. But leadership can only operate if it understands and engages with the problem. This is true of any problem, and is no less true for legacies. For leaders to lead in the field of legacies, they must:

1. Understand the nature, importance and value of legacies
2. Determine the climate and culture of an organisation so legacies can thrive
3. Have the right strategy
4. Be clear about how to measure progress
5. Have the right people in place to deliver

Organisations that want to create long-term legacy income must focus on the human exchange, behaviour and experience backed up by investment, strategy and a crafted and understood proposition for legacies that resonates with the donor by inspiring and uplifting.

One of the areas with which legacies resonate is a hopeful future. Donors want a positive, optimistic outcome and one of the areas with which this is most in synch is the purpose and vision of the charity. Curing cancer resonates with a legacy message of a world in which people don't suffer from cancer through the mechanism of a gift in a donor's will. Organisations can build a strong platform for legacies through their messages and through their greatest asset, their people. This extends to influencing supporters – both known and unknown. The closest example is the characteristics of the brand, the purpose and the values of a charity and how they are brought to life through services, behaviour and activity. It is the same for legacies, and building a legacy-friendly and legacy-ready message and experience can add huge value to reaching out, engaging and inspiring donors to leave a gift.

Some examples of strong legacy propositions are:

1. **Cancer Research** – Write an end to cancer – Leave a gift in your will
2. **WaterAid** – Leave a world with water
3. **Red Cross** – Leave a gift of compassion and hope
4. **Age UK** – Leave a world less lonely with a gift in your will to Age UK

At the **NSPCC**, when we first explored ways to help all staff engage in legacies, we found that there were three things staff needed to have in place to be able to have a legacy conversation with anyone.

To help everyone engage with legacies, we need to deliver knowledge, tools and confidence to enable a conversation to begin.

This insight is at the heart of how to make an organisation legacy-friendly and to create the environment in which it becomes normal, and in which donors can see and feel that their legacies matter. To support a positive organisational culture, the following principles and actions have been identified:

1. Legacy messaging and positioning should show that the entire organisation values legacies and the donors who are considering them

- If the experience of considering a legacy gift feels like it is an unusual one, or is not understood by parts of the organisations with which the donor may engage other than the legacy team, then the potential for the gift is less likely and, more importantly, the donor is more likely to resist engaging
- If legacy messages are restricted to legacy pages, it restricts the process of a donor considering a gift
- Sensitivity to the legacy subject prevents donor engagement - organisations have a responsibility to address this barrier by promoting a positive experience

2. Charities should support efforts to ‘normalise’ legacies by the way in which they behave with staff, how they talk to and behave towards the public and partners, and via active contribution to the sector

- Normalising legacies is a strategy that supports growth in the market, is good for the organisation in that it helps donors to engage, and which is ultimately good for the donor. Organisations need to recognise that they can play a part in helping to create the atmosphere and environment
- Practical ways to do this would be to ensure all staff are briefed, trained and engaged, and have a process in place to help donors with whom they engage to consider leaving a gift in their wills

3. Belonging to and contributing to Remember a Charity helps to create an internal atmosphere of acceptance and normality concerning legacies, as well as engaging a wider audience.

- Donors like to see charities working together, and charities can leverage engagement through being seen as part of a wider campaign

- Contributing to the wider campaign provides practical internal opportunities to engage supporters in a helpful way, and creates content to engage staff
- 4. Trustees should take responsibility for engaging and understanding legacy fundraising, and should be able to support the donor experience by engaging with the organisation’s legacy programme and supporting the charity by leaving a gift in their wills.**
- Leadership and acceptance by the governing body help to set the tone for how legacies are delivered and received by donors
 - Public support for legacies and a positive experience will be enhanced
- 5. Organisations should measure the donor experience of legacies via a net promoter score collected as part of the legacy programme**
- Donors’ experiences, if sought, send a signal that the experience matters
 - Leadership can set the tone that experience is important, and can establish a positive culture and climate, as well as the conditions to strive for improvement
 - Measurement is focused on a good and positive experience, and the systems and processes resulting from this provides a further opportunity to engage supporters
- 6. The legal and probate processes of a legacy gift should closely follow or be part of the gift process in order for donors have the same experience of giving, recognition and gratitude.**
- Organisations that split the marketing and legacy admin (probate) can potentially create a disconnect in experience for the donor and family that can undermine the joy of giving
 - Donors require service and support in a consistent way that is in line with their view of the charity
- 7. All staff should have a basic understanding of the needs of legacy donors during induction to help to create a legacy environment in which donors are valued.**
- Donors can engage with various parts of an organisation during legacy consideration, such as finance, communications, legal and fundraising.
 - Having joined-up understanding and empathy can improve the experience at all touch points

- During the journey, involve and engage staff in legacies to emphasise that everyone plays a part in making the donor feel good and valued.

The legacy marketing, fundraising and influence method and experience

As described in the first section of this report, the history of legacy marketing has largely been driven by the focus on revealing intent. The reality is that the majority of legacy gifts are made without revealing intent in life. We have indicated reasons that this focus may actually drive engagement away rather than encourage openness.

Our need to measure has focused on the pledge. But, as described in the introduction, if we are to increase gifts through better and more donor-focused experiences, we need to deliver better tools to make this possible. How donors are inspired and engaged regarding legacies impacts directly on their willingness to consider this as an option and turn thought into action.

We are now seeing a new form of legacy fundraising. This involves creating a more integrated experience, with a strong proposition, and many different channels and ways of reaching supporters, ranging from TV to face-to-face encounters and everything in between. Donors want to be engaged and inspired but, when it comes to legacies, we must add 'informed'. This is a difficult combination and requires a longer term view instead of relying on the immediate fix of a pledge. Digital is a perfect medium for this approach, allowing supporters to engage, exchange and explore without the pressure of commitment

The challenge here is to provide an alternative set of measures. The 5 Cs model, devised by the author (Stephen George) and based on the more traditional enquiries and pledger's language was tested at the NSPCC; it has subsequently been used by a range of charities and was published in **Legacy Fundraising - Third Edition Edited by Sebastian Wilberforce and from DSC**. The 5 Cs are as follows:

- a. **Connection** - we recognise that we engage with a wider audience and use this to influence a legacy 'brand' and message
- b. **Conversation** - when people elect to engage and can be contacted again
- c. **Consideration** - when people consider actively by enquiring, or taking information, or expressing interest
- d. **Commitment** - when people state they intend to leave a gift but haven't yet
- e. **Completion** - when people state they have already left a gift in their wills

This approach recognises the need to be more deliberate in measuring the wider set of measures - in reality, this is where donors are and how they behave. This approach balances the wider process from long-term consideration to action, and reflects Prochaska's change model. To enhance the experience, we must measure donors' actions and behaviour in terms of where they are instead of adopting a narrow, singular view.

In addition, we need to embrace donor-friendly language. This can play a major part in the donor experience and has been the subject of debate for many years. In **Relationship Fundraising**, **Ken Burnett** said

One aspect of wills, bequests and legacies charities that can influence the better is the terminology. It's an area full arcane words and phrases such as legato, residuary, codicils, executors and so on. We have even contributed by introducing terms of our own such as pledging, which isn't a very user-friendly concept or at least doesn't sound as if it is. If fundraisers are to promote legacies widely, perhaps we should re-examine the language we use to make it more appropriate to what the donors want to hear.

The search for the appropriate language is crucial for establishing a social norm and helping donors to engage, and it is likely that we have not gone far enough. For some charities, language is still not widely considered by the wider sector. We need to make a further shift from internal, technical and alienating language, to language, references and words that are in tune with the donors and that we would be happy and content to share with them openly.

This is true of legacy communications, whether the aim is to identify a new legacy gift or to nurture and support an enquiry, or even a family that is going through the probate process. The language must create more recognition of the donor's intents and circumstances. In the study **Will it work? 2013 An analysis of Legacy advertising by charities in 2012/13, the context in which it has to work and an assessment of future prospects of problems in attracting legacies**, the author **Andrew Papworth** concluded:

Legacy communications need to be friendlier, with strong incentives to respond promising more recognition to legators and their families, ensuring more awareness of the concerns of the potential legato.

If language is to play a part, so must some of the basics of stewardship, such as saying thank you and being able to engage honestly. In the **AFP report on Planned Giving 'Identification, Death and Bequest Giving'** written by **Adrian Sargent and Jen Shang**, they shared some findings from **Dame Green** who, in the 2003 15-year study on non-profits, wrote the following:

1. Donors who received a letter asking them directly for a request were 17 times more likely to give a bequest than were donors who were not asked
2. Donors who were thanked gave twice as much as those who were not thanked
3. Those who were cultivated (notes, letters, visits and so on) after the thank you gave three to four times as much
4. Less than one donor in 14 had informed the charity that they had named is as a beneficiary in a will

In his 2014 study to uncover the right legacy messages, Professor Russell James, professor at the Department of Personal Financial Planning at Texas Tech University, discovered a series of findings relating to both language and stories to engage donors in a way that resonated with them directly. Here are the key findings summarised from the report:

1. Use family words (stories and simple words), not formal words
2. Use social examples/norms
3. Tell life stories of planned bequest donors
4. Talk about benefits - in the right way
5. Ask about family/friends' connections to the cause and give the option of a tribute gift in the will
6. Tell life stories of donors whose plans include tribute gifts
7. Keep communicating with older donors

Results from 20 survey groups including nearly 10,000 total participants collected during 2013 and 2014 with one goal: To uncovering the messages and phrases that work to encourage planned giving Theory Results Action

In the paper entitled We the living: The effects of living and deceased donor stories on charitable bequest giving intentions, Professor James, working with UK Legacy Giving expert Claire Routely, presented some findings concerning specifics about stories in legacies. In Claire's words (on her blog <http://www.legacyfundraising.co.uk>),

We used an online survey asking people to rate their intention to give to various charities. We then asked them to read stories about people who were leaving legacies. The stories were framed so the donor was either alive (i.e. someone who had recently signed a will leaving a legacy), or dead (i.e. someone who had died and left a legacy), although in either case the donor was the same. After reading the stories, participants were asked about their likelihood of leaving a legacy. There was also a control group who weren't given any stories.

Donors who had read any stories - whether the donor was alive or dead - expressed a greater interest in leaving a bequest than those who had read none. Those who had read stories about living people expressed a greater interest, as did those who read more stories about living people.

The summary of this reflection on legacy marketing and fundraising shows that we now have evidence to prove what was once simply instinct and understanding. Perhaps it takes evidence to prompt us to revert to the very things many know to be truths.

The closer we are to the donor in the way in which we engage them, the more likely we are to inspire them to act.

Legacy Fundraisers reflected on a number of these dimensions in the survey and during this project, but ultimately supported the following seven factors that can directly influence the donors' legacy experience through better legacy marketing and the shift to a more influence-based approach.

1. Ensure the organisation's brand projects the organisation's needs in a way that also reflects the needs and aspirations of the donors.

- An organisational brand can often be an internal facing definition. There needs to be language rooted in the donor and their experience first
- It is particularly true that this needs to work for legacies - an organisational brand needs to embrace legacy messaging.

2. Build a programme of events and face-to-face opportunities that reflect the personal nature of the gift

- Developing a marketing approach that offers donors the opportunity to meet face-to-face helps to inspire and engage them
- The mere act of being invited can have far-reaching impacts on future legacy gifts
- Encouraging face-to-face conversations enhances the style and approach of a donor-friendly legacy campaign

3. Incorporate and integrate legacy messages into all fundraising activities, channels and supporter journeys to demonstrate the need, the normality and the value of legacies

- Incorporating legacy messages can help to normalise legacies
- This is often described as a 'drip drip' approach
- The aim is to reinforce legacy messaging and to influence and educate donors

4. Embrace technology as a key opportunity to inspire and engage donors in a positive way that supports donor engagement and builds relationships.

- Social media such as Facebook, Twitter and YouTube, amongst others, are the perfect medium on which to engage
- Digital fundraising in an integrative way combining events, PR, telemarketing and other channels can greatly enhance experience
- The use of mobile technology - smartphones are an opportunity waiting to be exploited
- The use of television is increasing, particularly when supported by digital

5. Emphasise the donor's life instead of the cause

- In making a legacy gift, we need to emphasise and focus on the donor's motivations
- Organisations that are keen to share a problem and engage people with a solution forget to frame this in terms of the needs of the donor
- A legacy gift is a reflection of a life led and being remembered – this must be reflected in the approach.

The probate and legacy administrative experience and approach

The donor experience is complex, and there are a variety of experiences that donors may have with a charity during their journey. From the initial thought and first contact through to appointing a solicitor, the experience needs to feel joined up and satisfying. For many, the first experience with a charity in terms of legacies may be as an executor or as a family member. How the charity deals with this important part of giving can make a tremendous difference to future giving based on the way in which donors and prospective donors experience this sensitive time.

Legacy teams report a sense that the challenging of wills by connected families is on the increase, possibly in line with more people leaving gifts and possibly due to media coverage. This can be countered to some extent by creating a more donor-friendly environment and educating supporters earlier to avoid any misunderstandings.

Much progress has been made to ensure the experience at probate is a positive one, but there can often be a disconnect, which may sometimes be of the charities' making. Separating the legacy administration from fundraising can create this disconnect. Equally, charities need to protect themselves from claims that entail challenges or defence. A balance needs to be struck.

The **Fundraising Regulators' Code of Practice on Legacy Fundraising** (formerly the IOF Codes of (practice) provides a framework to ensure legacy fundraising takes place without undue influence being exerted. The principles of the code are presented below:

- a) A fundraiser **MUST NOT*** exert undue influence on a potential legator.
- b) Organisations **MUST** ensure that all legacy fundraising activity is done whilst considering:
 - the duty of trustees to optimise the benefit to the fundraising organisation;
 - the potential legator's freedom to provide for her/his family and others; and
 - the sensitivities of the potential legator and his/her family and friends.
 - i.
- c) Organisations **MUST** ensure fundraisers do not provide legal advice.

The **ILM (Institute of Legacy Management)** was established in 1999 as the membership body for legacy professionals – those responsible for the successful and sensitive administration of donors' final gifts to charitable organisations. Its purpose is to ensure that every donor's charitable legacy achieves its greatest potential. This body, along with the Institute of Fundraising and others, has helped to improve the professionalism of legacy administration. It has done so against a backdrop of families increasingly challenging wills, possibly in line with more people leaving a gift to charity and possibly due to media coverage. This can be

countered to some extent by creating a more donor-friendly environment and educating supporters earlier to avoid misunderstandings.

Bringing the probate experience under the wing of the fundraising and stewardship process changes the paradigm to that of an experience instead of a required process.

Therefore, when asked about this dimension from the donors' experience viewpoint, legacy practitioners identified the following five core principles or actions:

1. Whenever possible, combine the fundraising, marketing, communications and legal aspects of legacy fundraising so that they operate in a holistic and donor-centred way

- Bringing these together creates a shared purpose supported by a donor-led philosophy
- A common behaviour emerges, with a common donor-friendly journey and approach
- The donor has a joined-up experience

2. Create a charter or statement of principles that are donor-focused for everyone to work on concerning legacies

- A charter or statement that puts the donor first creates a platform and self-guiding rules for working together
- They can be seen by donors and will encourage and engage them further

3. Build a welcome programme and stewardship model for donors' executors of wills

- This is a practical way to engage donors in the experience. An executor has great influence, and this is an opportunity to influence them positively
- Drive the legal process alongside a 'customer' or 'donor' journey
- Acknowledging and helping families and executors builds trust

4. Involve and engage executors, solicitors and partners in the work of the charity and invite them to events

- Those involved in the probate process should be looked after and influenced in a positive way as potential supporters and partners
- They act as powerful allies and advocates if they have a positive experience

- A negative experience can be disastrous

5. Ensure that all communication, including legal and probate content, is donor friendly

- This ensures that all communications use the learning and insights presented in earlier sections of this report
- It is more donor friendly and provides a consistent experience
- It minimises conflict and maximises future support

Appendix I

Case studies to showcase putting donors at the heart of legacy fundraising

Four case studies are described here, each demonstrating strategy and behaviour in legacy inspiration that place the donor at the heart of its practices and activities. They are

1. Remember a Charity
2. WaterAid
3. UNICEF UK
4. Cystic Fibrosis Trust

Each case study has been chosen to showcase the type of approach set out in this paper and identified in the project.

Remember a Charity



Remember a Charity was launched in 2000 and consists of over 160 of the UK's favourite charities. The campaign works with member charities and partners in the legal sector, government and private sector, to encourage more people to consider leaving a charitable gift in their will once they have looked after their families and friends.

Together, Remember a Charity aims to do what no single charity can do alone: make legacy giving a social norm by changing behaviour.

WaterAid



WaterAid started in 1981 and, in the last 30 years, has gone from strength to strength to become one of the most respected organisations dealing solely with water, sanitation and hygiene issues. It has also helped to influence policy and practice to ensure that the vital role of water, hygiene and sanitation in reducing poverty is recognised globally.

UNICEF UK



UNICEF was created in 1946 to help to protect children after World War 2. UNICEF is the world's leading organisation for children, promoting the rights and wellbeing of every child. Together with its partners, UNICEF works in 190 countries and territories to deliver practical action, making a special effort to reach the most vulnerable and excluded children. UNICEF UK also runs programmes in schools, hospitals and with local authorities in the UK.

Cystic Fibrosis Trust



The Cystic Fibrosis Trust is the only UK-wide charity dedicated to fighting for a life unlimited by cystic fibrosis (CF) for everyone affected by the condition. Cystic fibrosis (CF) is a genetic condition affecting more than 10,800 people in the UK. The Cystic Fibrosis Trust funds cutting-edge research, drives up standards of care and supports people with the condition and their loved ones.

Remember a Charity



The following case study has been taken from SOFII (<http://sofii.org/case-study/remember-a-charity-legacy-awareness-week-2014>). The case study illustrates an insight-driven and donor-led campaign.

From 8-14 September 2014, the Remember a Charity consortium ran its annual awareness week to encourage more people to consider leaving a gift to charity when writing their wills. The campaign was marked by a documentary film, in which three inspirational grandparents shared their remarkable stories to remind the nation that anyone can become a living legend by including a charity they care about in their wills. Over 100 of the nation's favourite charities were involved in supporting the awareness week and in generating discussions about legacies internally with colleagues and externally with supporters.

Remember a Charity provided member charities with a range of toolkits to enable them to have conversations about legacies. The kits included a handbook on marketing, which provided information about the materials available to help charities raise awareness of legacies among their internal teams, in charity shops and when speaking externally to supporters. Charities were provided with PR guidelines outlining how they can support the campaign and amplify the week, as well guidelines on retail and digital and social media, and how to increase the campaign's reach. Other assets provided to member charities included a teaser film and full documentary film, posters, logos, copy and posts on social media.



Charities took part in the week by displaying Remember a Charity Week posters, bookmarks and chocolates in their charity shops as simple talking points for legacy discussions. Many ran direct mail campaigns, as well as engaging on social media platforms and dedicating an area of their website to the campaign.

The campaign proved to be a powerful way for charities to create conversations around the topic of writing a will and legacies. By using light-hearted and emotive tones to communicate a sensitive subject, members of the public were encouraged to talk openly about legacies. The 'living legends' theme was highly accessible and allowed the consortium's members to adapt it to their audiences. Charities found their own legends to promote on-line, internally to their teams and in charity shops across the country, ensuring the campaign reached a wider audience and supporter base. The campaign enabled charities to connect with people emotionally because of the strength of the message that 'there's a legend in all of us'.

Remember a Charity utilised free channels, including charity shops, social media, referral links with websites and support from Clear Channel Outdoor to increase awareness of the campaign.

The Remember a Charity website saw the highest traffic in the campaign's history, generating a 40 per cent uplift in website traffic compared with the previous year. Twenty-five per cent of people visiting the website went on to find details about their local solicitor or a charity they cared about, and to which they would like to leave a gift. The campaign reached more than five million people on social media, including support from high-profile figures such as Lord Sugar (UK businessman, media personality, inventor of the catchphrase 'you're fired' and political advisor).

The week also resulted in tangible legacy gifts. A member of the consortium had a legacy gift pledged off the back of Remember a Charity Week's campaign in the charity's shops. The Cabinet Office and key partners, including Legal & General, the Law Society and the Co-operative promoted the week via social media and to their staff, and it was widely promoted by solicitors. Extensive national media coverage included The Independent, Mail on Sunday, The Times, Daily Mirror on-line and The Mail Online. The PR and advertising campaign reached millions of people.

WaterAid



This case study was put forward for an Institute of Fundraising Legacy Award and highlights the combination of strategy, marketing and culture to promote legacies in a more donor-friendly way

WaterAid developed a new legacy marketing strategy at the end of 2014. It recognised that, whilst there had been consistent growth in legacies, it needed to reach a wider audience for this to continue, and the most cost-effective way available was to increase its reach via its existing channels and relationships. It recognised that a step towards change could take place if it helped to normalise the legacy offer for donors and staff alike. Its key aims were:



- Making legacy giving available and accessible for all audiences
- Creating opportunities to engage supporters in a legacy conversation
- Creating a culture at WaterAid in which consideration of legacies are a normal part of the supporter journey
- Developing opportunities to reach other audiences.


As part of this strategy, WaterAid set about training its staff to have a legacy conversation to help to normalise legacies. Staff were trained to understand what legacies were, how to confront their fears (both professionally and personally), to engage with the strategy and to be able have a legacy conversation comfortably. At the heart of this was a core method being driven, namely engagement through conversations.

To support this approach, WaterAid joined the Remember a Charity campaign to access tools to give staff and donors the following opportunities:




- A relevant reason to talk to all audiences about gifts in wills by using the content of the campaign and campaign moments such as the awareness week
- Allow staff, who had been trained in legacy conversations to use the campaign, to practice what they had learned and to engage supporters with the legacy message.
- Focus on discussing legacies while creating consistency of messages and noise around the legacy message to create more impact
- Allow WaterAid to test legacy messages and deliver a donor friendly campaign
- Help embed a legacy culture at WaterAid in which everyone can be involved.

Remember a Charity created a will-writing campaign moment involving volunteers who skydived while writing wills, called 'Extreme Will' writing.

WaterAid United Kingdom  

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Legacy [Remember A Charity Week](#)   

Be a living legend

Leave WaterAid a gift in your will.

[Request a legacy information pack >](#)

Two amazing WaterAid supporters went to 10,000ft to leave gifts to WaterAid in their wills. Find out why they went to such extremes.

Dave and Meryl have taken part in an extreme will writing challenge for this year's Remember A Charity Week to raise awareness of charitable gifts in wills.


Such gifts are vital to our work. They help us reach thousands of people every year with taps and toilets. Thanks to passionate supporters like Dave and Meryl we know we can continue to transform lives in the years to come.

But you don't have to jump out of a plane to be a living legend. Simply including us in your will is legendary enough.


Meet our extreme will writers

Dave Shurlock, 65, Surrey

"People think of a legacy as the amount of money they're leaving but it's a chance to say something about who you are and what you believe in."

Extreme Will Writer: Dave's story | WaterAid 

Leaving a gift in your will



[Fill in this quick form to get a legacy information pack >](#)

Or if you'd like to chat in person, please get in touch with Imogen (above) on 020 7793 4594 or email her at lhardman@wateraid.org

REMEMBER A CHARITY IN YOUR WILL WEEK

12-18 September 2016

[Request a legacy information pack today >](#)

Having two WaterAid volunteers selected for the national campaign meant that WaterAid were able to tailor their stories to each of its audiences to make the legacy ask both relevant and inspiring while overcoming the barriers some fundraising teams had experienced when promoting legacies.

The campaign's new approach engaged supporters and staff.

- All fundraising teams were asked to promote legacies to their key audiences and relationships, and to practise the legacy conversation skills in which they had been trained

- Two WaterAid supporters were selected to lead the national Remember A Charity Week campaign, giving WaterAid a unique opportunity to share its stories
- More people engaged via email, with an overall email opening rate of 30%, which was 10% higher than the average opening rate. This was achieved because of the nature of the engaging content and story
- A higher conversion of telephone activity, 23.5% versus 20%, was achieved as the callers were able to begin a conversation using a subject that was easy to share and opened the way for a better quality phone conversation
- The legacy webpage normally experienced 2% of web traffic; however, this rose to 17.7% during the campaign.
- Account managers for community volunteers and water industry partnerships became more confident about discussing gifts in wills. In the process of these conversations, they discovered the donors' intentions and realised that their audiences were interested in legacy giving and continued to talk about legacies throughout and beyond the campaign.
- WaterAid was founded by the UK water industry in 1981, and it still works very closely with the industry. Two companies had legacy roadshows that were launched with a new, free will service that reached 1,500 water industry staff. Other water companies were involved in sharing posters and intranet stories during the week, while Yorkshire Water released a press release about gifts in wills to WaterAid

The first national legacy presentation took place at the annual WaterAid Supporter's Day, featuring the two skydiving volunteers and reaching 500 key supporters. Stories were at the heart of the approach. The two volunteers who took part in the campaign made a tremendous difference via their personal stories.



Dave Shurlock is a retired teacher and grandparent. He had visited WaterAid's work in Burkina Faso, and WaterAid crafted his story into an email sent to all supporters. Dave was able to counter the perception that only rich and childless people leave legacies and, as he had seen the impact of donations directly, he could share the impact that legacies will have.

Meryl Knapp was also a retired Yorkshire Water employee. Meryl's story was shared with water company staff, which meant they were able to share the legacy message with some water companies for the first time, and piloted the first legacy road shows within two companies reaching 1,500 staff that now understand the importance of water and sanitation.

With regard to the telephone campaign script, WaterAid tested the sharing of both Dave and Meryl's stories to see if gender had any uplift on people requesting a legacy pack. They also became community volunteers to promote legacies during their talks.

Overall, the campaign enabled a culture shift to take place, as staff became empowered to engage with legacies, and supporters were engaged in a positive and uplifting style.

Cystic Fibrosis Trust

**Cystic
Fibrosis Trust**

The Cystic Fibrosis Trust recognised that, as a charity in which the condition they were seeking to address was responsible for early death, the subject of legacies was a difficult one to introduce to their core audience and beyond – people with CF and their families and friends.

As part of a wider strategy to engage supporters, they ran a single campaign to engage in a light-hearted, fun and humorous way that helped to deliver the message that planning for the future, taking care of family, friends and charities that people support, need not be daunting. This means simply making sure that people have thought about the future.

The campaign injected a humorous element using a memorable title - The Ancient Egyptians got it wrong. It sought to showcase the ease and importance of writing wills, and to let supporters know about the importance of considering including a gift to the Cystic Fibrosis Trust when making such arrangements, as well as how it will ensure that the Trust can continue fighting cystic fibrosis long into the future.

The campaign had a limited budget, but using a talking point and humour caused it to stand out, and it secured 212 new enquiries. It organised a fancy dress walk as part of the campaign, which ended with the signing of wills and including a gift to the Trust. This showcased how obtaining gifts in wills can make use of a fun and light-hearted approach while being incorporated into the general fundraising combination.

Michael Clark, Legacy and In-memory Manager at the Cystic Fibrosis Trust,
said

‘Gifts in Wills need to form part of the everyday conversations with supporters about how they can financially support your organisation’.

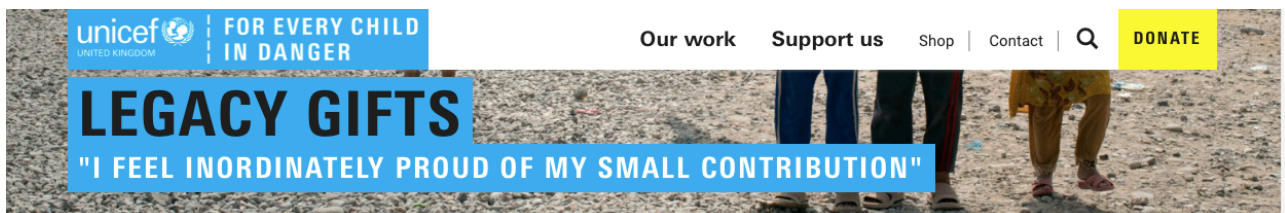
UNICEF UK



UNICEF UK had reviewed its legacy strategy and concluded that it needed to engage a wider audience and to reach more people while simultaneously finding innovative ways to engage existing supporters.

UNICEF decided to establish a dialogue with supporters to understand what motivates supporters to leave a gift in their wills, and to identify ways of providing them with the experience and information they expect and need. Secondly, the approach sought to engage supporters in a new way by gaining insight in the form of direct conversations with supporters and legacy supporters, enabling it to use the content provided directly by them to inspire and engage others.

As part of the new strategy to inspire and engage both new and existing supporters, UNICEF spoke to several of its closest legacy supporters who shared their own stories to encourage conversations amongst peers and supporters. Personal experiences with the charity and motivations to consider a gift in their wills were then used to support the legacy programme, encouraging and inspiring others to do the same, each helping UNICEF to achieve its aim of creating a safer world for children. Similarly, blog posts written by supporters were placed on the website pages and were used to ensure that new visitors to the site were met with accessible content. In effect, UNICEF was ‘social norming’ its website.



Home > Legacy gifts: "I feel inordinately proud of my small contribution to the work Unicef does"

Beverly Goater has been a Unicef supporter for around 17 years. She recently received a legacy gift from a family member and made a generous donation to our Syria children's appeal. Beverly travelled to our Supply Division in Copenhagen, where we store life-saving supplies to be shipped around the world to help children in danger.

I was delighted to be invited to visit Unicef's distribution centre in Copenhagen by the UK **Gifts in Wills Team**. I had been involved with Unicef for several years, and had been in touch with the team when I was able to make a gift from a legacy I received from a family member.

My involvement with Unicef started about 17 years ago when I was a member of a fundraising group in Montrose, Scotland. We had fun raising money and were passionate about Unicef's work for children's



Beverly Goater, a Unicef supporter, visited our Copenhagen Supply Division.

Events were used to keep in touch with supporters, to ensure that supporters were informed and inspired, and that relationships continued to be built. Throughout this continuing events programme, feedback and insight were sought continually. The events separated committed legacy supporters from prospecting events and allowed UNICEF to tailor the message according to supporters' commitment to including legacies in their wills. 'Pledger' events placed emphasis on thanking people for their on-going support and acknowledging the special decision to leave a gift they have made. Prospecting events offered the same heartfelt thanks, whilst introducing the supporters to consider a legacy. Events also allowed the fundraising team to create a space in which supporters could network with one another and create a sense of community. Many people recognised one another from previous years, and could come together to unite, share stories and strengthen their relationships.

The stewardship programme focuses on personalisation and on ensuring each supporter knows that s/he is valued as an individual and not just as a collective group of people. To ensure this starts at the beginning of the legacy journey, the legacy team has created personalised website pages for anyone who registers an interest and requests a legacy guide. For many supporters, this translates to hand-written cards and personal phone calls once staff have established a good relationship with them. The level of interaction with each legacy supporter is established on a case-by-case basis to ensure engagement with them is on a level at which they feel comfortable. At every turn, it is personalisation that guides actions within the overall legacy programme.