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**Planning a legacy campaign from scratch: An Introduction**

1. **Overview**:Legacy fundraising is a long term, highly valuable fundraising tool which works best not through ‘heavy selling’ but through the consistent reiteration of an impactful legacy message. To be effective this message needs to be promoted on a long term basis across all PR and marketing channels. The most effective legacy campaigns are ‘owned’ by everyone in the organisation from Trustees to local volunteers.
2. **Legacy fundraising - Advantages**
* Charity legacies amount to around £2 billion in the UK annually.
* Legacies tend to be the largest gift left by an individual donor. The average UK residuary legacy (i.e. left as a share of someone’s estate) is £34,000; pecuniary or cash legacies average around £3,500. (Ref: Institute of Fundraising)
* Return on investment (ROI) is one of the biggest in terms of fundraising methods – an average of £35.80 is raised for every £1 invested on legacy campaigning. Trust fundraising, the next best ROI, averages around £8.82 for every £1 spent.
* Investment will repay itself but legacy fundraising need not be expensive.
* It isn’t always the wealthywho leave legacies –the top donors in certain charities are sometimes people on modest incomes.
* Charities that promote legacies over time find that legacy income is unpredictable at first but becomes a more regular and even predictable income stream.
* Although relevant to all organisations, legacy fundraising can have particular relevance for faith based organisations. Reasons for this I because of: a high level of ‘buy in’ from supporters to the spiritual and community work of churches / organisations; a desire to see ‘good works’ continue in the longer term; a commitment and attendance which often stretches back generations; a sense of duty to good causes; a large percentage of members who are in middle to upper income brackets and who may already recognise the benefits of making a will.
1. **Legacy fundraising - Challenges**
* Legacies are a long term game – it will take 5 to 10 years to see full results although some organisations see moderate to good results after 2 years.
* Some charity Trustees and managers see legacy campaigning as ‘inappropriate’. Thisis a needless barrier – as long as it is done sensitively, people do not mind being asked about legacies. 73% of people say they are open to leaving a legacy to charity and hospices and hospitals, who deal with highly sensitive issues, raise many millions through legacies every year.
1. **Need for a strategy**: Simply designing a leaflet or advert, although necessary, will have limited impact. A more strategic approach is to use the ‘3 P’s’ i.e. the **People** to be targeted; the **Proposition** to be used and; the **Promotional Channels** to be used
2. **People**
	1. *Why people leave a legacy:* Reasons why people leave a legacy are likely to include:
* Sense of duty and a commitment to ensuring ‘good works’ continue
* Concern for those less fortunate than they are
* To give something back
* To say thanks for services received
* Because your organisation has treated them well
* Because they are asked (conversely, people will not give if they are not asked)
* To be remembered
* To save on tax.
	1. *Who should you target for legacies?*
* The typical legator is an older female from social group ABC1. However, men also give and people don’t always fit the norm so targeting should be broad. (Except for age reasons - there’s little point in appealing to anyone of 25 or under).
* The ‘reachable audience’ for legacies should be identified and roughly quantified. It’s a good idea to start with people known to the organisation - for example:

|  |  |
| --- | --- |
| *Internal sources* | *External sources* |
| Trustees | Past and current donors  |
| Volunteers  | Families of past and current users |
| Past and current users of services | Local business / social groups |
| Staff | Suppliers |
| Congregation members | Local people  |
| Facebook & social media contacts | The wider community |

* It is a good idea to put rough numbers against each target group – tallying up likely prospects is a good indication of the resources that will be needed to reach them.
* If any legacies have been received in the past, the background of the people who left them will be a good indicator of who is most likely to leave a gift in the future.
* A good pointer is to identify people with multiple forms of relationships with the organisation – these are liable to be good legacy prospects. An example might be a person who donates and who also volunteers.
1. **Proposition**
* It is important to consider why anyone should leave a legacy to your organisation as opposed to any other organisation. The aim is to develop a case statement of around 100 words which sets out why you need and deserve legacies and perhaps a shorter ‘core proposition’ statement to sum this up. These statements should focus on the future i.e. what could you achieve if funds were available in future years? The statement and proposition can then be used on legacy promotional materials.
* A valuable way to develop this - which may also bring useful information for other aspects of your work– is to get together a small group of people (around 10 to 12) representative of the target groups mentioned above. What do they like and dislike about the organisation? Why do they support you? What would motivate them to leave a legacy? How best might the need for legacies and the practicalities of leaving one be communicated to them?
* Here’s an example of a (fictitious!) case statement:

**Save the Widgets: We’re in it for the longer term…**

**Leaving a gift in your Will:** Everyone wants to leave this world with a knowledge that the things they care about will be looked after when they’re gone. At Save the Widgets, we work towards protecting vulnerable Widgets and their communities. Our work requires perseverance; we’re in it for the long haul.

*“If we all work together we can make good things happen, we can help each other. I love being in cared for in a Save the Widgets community house. It feels like being in a new family where they understand you.” Pauline, aged 10*

By leaving a gift to Save the Widgets in your Will, you can help ensure that our life-changing work continues for years to come.

*“Save the Widgets has a strong hope for the future; a future where every Widget is able to reach their full potential, and where each is included in a healthy, happy community. I would like to think that the work of STW could carry on well into the future and that’s why I’ve chosen to leave them a gift to in my will.” STW donor*

* Your proposition once developed might then form the basis for the production of promotional materials such as:
	+ A standard one page / half page ‘advert’ for use in publications preferably including an appropriate, professional, impactful image / photo.
	+ A booklet on how to leave a legacy to your organisation including a ‘pledge card’ for people who intend to leave a gift to return to the organisation.
	+ A dedicated legacy page on your website andlinked to your Facebook site.
	+ A legacy leaflet – to be left at all your outlets and, as appropriate, distributed at meetings, etc.

The organisation should not be tempted to ‘fiddle’ with the message – once developed it should be stuck to and communicated consistently over time. It may take many opportunities to see the message before people take it in.

1. **Promotion**

The key to cost effectiveness is to maximise the use of what you already do. In addition, given that organisations often do not know what prompted a legacy gift, legacies should be mentioned on absolutely everything you produce. Here is a list of promotionalchannels that might be used:

* Existing newsletter – standard one page or half page legacy ‘ask’
* Annual report – as above
* Talks and presentations – these should always include reference to legacies
* One to one discussions with supporters – a leaflet could be used here
* E mail signatures and tags – everyone using e mail should be tasked with including a legacy strapline i.e. a standard wording provided to them for the purpose
* Business cards – the strapline could be used
* Stationery – also use of the strapline
* Social media – a legacy Facebook page could be established
* Posters / display stands for use at your offices and sites
* Legacy events e.g. tying a legacy ask into a guest lecture on a given subject.
* External advertising in specialist press and general press / media
1. **Practicalities of running a legacy campaign**
* Those enquiring as a result of advertising might be sent a legacy booklet and cover letter and their details recorded or logged on a database.
* The booklet would include a ‘pledge card’ to be returned by people intending to leave a legacy. However, there are issues in tracking these ‘intenders’ – in some cases people will not want to let the organisation know their intentions and, in some cases, they will not carry through on their intentions.
* Enquirers, and especially those who end up pledging a legacy gift should be thanked appropriately and in an impactful way.
* Those enquiring / pledging should be sent regular updates on your work.
* For some donors, the need to be remembered may be a factor in their decision to leave a legacy. Some charities have developed books of remembrance, plaques in buildings, tree planting, gardens of remembrance, etc. Again, this warrants further discussion and would be a good topic for any focus group on legacies.
* How will the campaign be sustained in the longer term? Options include combining the task with other existing fundraising roles, employing someone part time or recruiting a volunteer to take on the task.
1. **Role of solicitors**

The role of solicitors in raising legacy funds is often misunderstood and exaggerated. Solicitors cannot steer legacy donors towards a particular charity – they are specifically forbidden to do so by the Law Society. Most solicitors are overwhelmed by charity literature and cannot practically display it – placing leaflets is a strategy which will only work if a good relationship exists between your organisation and the solicitor. However, it may be possible, through personal contact, to build a relationship with a network of solicitors who are prepared to write wills for supporters at a low cost or for free in the hope they will leave you a legacy. In some cases clients are asked to give a donation to the charity in lieu of a fee. Another way solicitors can help is by giving talks to groups of supporters on the general principles of making a will – in this way they may gain clients and the charity may gain supporters. It is generally always a good idea to run any booklets or detailed materials past a solicitor to ensure that they are factually accurate.