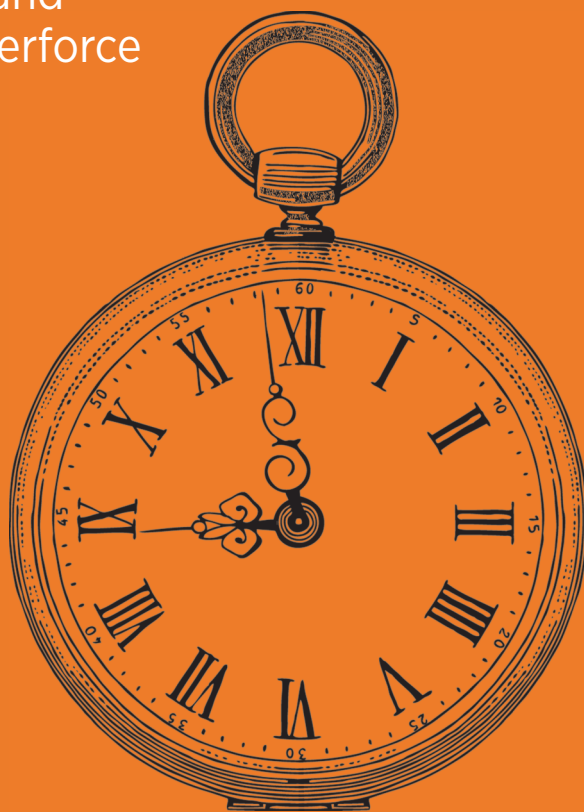


The
Fundraising
Series

Fourth edition

Legacy and In-Memory Fundraising

Edited by
Claire Routley and
Sebastian Wilberforce



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Ian Roome MInstF, Head of Fundraising and Volunteering, Over and Above NHS Charity, Northern Devon Healthcare NHS Trust

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This book is dedicated to
Phillippa Wilberforce
1961–2018

Her kindness, passion and genuine interest
in individuals would have made her a
good fundraiser, as those qualities made
her a hugely loved wife.

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About the Fundraising Series

Despite paid fundraisers having existed in some form since the middle ages, fundraising as we know it today is still an emerging profession. The Institute of Fundraising has only been in existence for just over 30 years, and it is only relatively recently that academics have begun to pay attention to the science behind giving to others.

A vitally important element of any profession is its body of knowledge – this is what enables members of a profession to grow, learn and reflect. Immersing oneself in that knowledge is, arguably, what makes one a professional fundraiser.

This series is an important part of bringing together fundraising's body of knowledge. It combines the best of the practical knowledge of experienced fundraisers with, increasingly, the expanding body of academic knowledge around giving and asking.

The series seeks to address the full range of fundraising activity and techniques. Each volume addresses a key element in the spectrum of fundraising techniques. As fundraising techniques evolve and develop, new titles in the series are added and old ones revised. Each title seeks to explore a fundraising activity within its historical, ethical and theoretical context, and relate it to current fundraising practice as well as guide future strategy. The series offers something for anyone who is aspiring to be a professional, whatever the size or type of their organisation or the stage of their career.

The University of Plymouth Hartsook Centre for Sustainable Philanthropy is proud to partner with the Directory of Social Change in the series' production. Furthermore, the series would not be possible without the input of many dedicated professionals involved in its writing and production; we thank everyone who has contributed to its development.

Adrian Sargeant PhD, Professor of Fundraising and Director

Claire Routley PhD, Research Fellow

University of Plymouth Hartsook Centre for Sustainable Philanthropy

About the Directory of Social Change

The Directory of Social Change (DSC) has a vision of an independent voluntary sector at the heart of social change. We believe that the activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to support these organisations in achieving their goals.

We do this by:

- providing practical tools that organisations and activists need, including online and printed publications, training courses, and conferences on a huge range of topics;
- acting as a ‘concerned citizen’ in public policy debates, often on behalf of smaller charities, voluntary organisations and community groups;
- leading campaigns and stimulating debate on key policy issues that affect those groups;
- carrying out research and providing information to influence policy-makers, as well as offering bespoke research for the voluntary sector.

DSC is the leading provider of information and training for the voluntary sector and publishes an extensive range of guides and handbooks covering subjects such as fundraising, management, communication, finance and law. Our subscription-based websites contain a wealth of information on funding from grant-making charities, companies and government sources. We run more than 300 training courses each year, including bespoke in-house training provided at the client’s location. DSC conferences and fairs, which take place throughout the year, also provide training on a wide range of topics and offer welcome opportunities for networking.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 020 7697 4200 or email cs@dsc.org.uk.

About the authors

Meg Abdy

Meg has been analysing the legacy market since 1994, when she co-ordinated the first ever legacy forecasting project, now known as Legacy Monitor. Legacy Monitor is the leading legacy benchmarking programme in the UK and has expanded internationally to include a programme in the Netherlands.

As a co-founder of Legacy Foresight, Meg has been involved in every aspect of the business from its inception – from forecasting to focus groups and from scenario-building to social media.

Today Meg is the Managing Director at Legacy Foresight, responsible for programme management and business development, with particular interests surrounding in-memory giving, international markets and donor research.

Sarah Bolt

Sarah is an associate in the Dispute Resolution Team at Stone King LLP specialising in acting for charities and individuals in legacy related disputes. Sarah has particular experience in dealing with probate and trust disputes.

She also works with charities to protect and defend their interests across a wide variety of disputes, such as governance issues, trustee and membership dispute and contract disputes.

Dan Carter

Dan is Global Legacy Director at the International Fund for Animal Welfare and was Head of Legacies from 2011 to 2016 at Marie Curie. He has worked in fundraising and marketing for thirteen years with the past nine focusing on legacies.

Dan has strong passion and experience in developing marketing strategies for legacies across organisations focusing on inspiration to motivate people to leave the greatest gift of all.

Jonathan Cook

With more than 17 years' experience in the charity and not-for-profit sector, Jonathan is an expert in organisational, fundraising and marketing strategy. He has worked with the likes of the Royal Horticultural Society, Diabetes UK, Voluntary Service Overseas, Parkinson's UK and Save the Children.

In 2012 he founded the fundraising agency Insight-ful, which combines insight, analysis and creativity to enable charities to develop innovative, inspirational and financially successful fundraising products.

Daniel Fluskey

Daniel is Head of Policy and Research at the Institute of Fundraising and leads its policy development and research work, which involves keeping up to date with member priorities, promoting innovation in fundraising and working with key stakeholders (including civil servants and politicians) to make sure fundraising and giving are key priorities for the current and future governments.

Daniel (Dan) Harris

Daniel is a partner and Head of International and Cross-Border with Stone King LLP. He advises UK and overseas private clients as well as charities and other solicitors on succession and taxation issues in all jurisdictions of the world. As a member of the charity legacy team he acts for some of the UK's largest charities, providing advice on complex cross-border legacies, as well as providing training on cross border charity legacy administration and marketing.

He is a full member of the Society of Trusts and Estates Practitioners (STEP) and the Franco British Lawyers Society and a member of the Law Society of England and Wales Cross Border Special Interest group.

Stephen George

Stephen is the founder of Good Leaders, a fundraising and leadership coaching consultancy that specialises in helping charity leaders be better leaders and raise more money. He has over 30 years' fundraising experience at all levels in the UK and internationally, with organisations such as NSPCC, UNICEF, RNIB, Action on Hearing Loss, Maggie's Centres and Scope. Stephen is also an international speaker, writer and podcaster. He has worked on global legacies strategies for international NGOs, was Development Director for Legacies at the NSPCC and was Chair of Remember a Charity, a UK consortium that promotes gifts in wills.

Eifron Hopper

Eifron is Legacy Income Manager for the RNLI. He has worked in the voluntary sector since 1993, prior to which he practised as a solicitor. He has worked for a number of charities including The Children's Society, Trinity Hospice, RNIB and Lighthouse in Poole. As a legacy and community fundraising specialist, he was involved with setting up Remember a Charity and has sat on many fundraising boards and taskforces over the years. He writes and speaks regularly on legacy matters.

Russell James

Russell has been Professor and Chair of Personal Financial Planning with the CH Foundation at Texas Tech University since 2013, and before that he was Assistant Professor at the University of Georgia. During his career he has headed up a fundraising department as Director of Planned Giving and has practised law specialising in estate and gift planning, and charity law.

He lectures in charitable planning and behavioural economics and his research interests are in charitable giving, charitable estate planning, and behavioural and neuro-economics. He is published regularly in the American academic press.

Kate Jenkinson

Kate is Head of In-Memory Consultancy at Legacy Foresight. She spent over ten years working in charities as a direct marketing, legacy and in-memory fundraising manager before joining the not-for-profit agency Whitewater in 2007 as Strategic Planner. There, she worked on legacy strategy for the NSPCC, RNLI and RSPCA among others, immersing herself in primary research. She was also a key member of the Our Lasting Tribute team. Kate has been instrumental in helping to shape the work of In-Memory Insight, the trail-blazing, cross-sector consortium on in-memory giving.

Nigel Magson

Nigel has 30 years' experience in the data services industry, developing innovative approaches to systems, data management and insight thinking. His work in the not-for-profit sector led him to co-found the Insight Special Interest Group in 2006, which champions and develops insight skills and application in the sector.

In 2014, Nigel was recognised through the Outstanding Contribution Award (awarded at the Institute of Fundraising's Insight in Fundraising

Awards) for his role in developing the Insight Special Interest Group and raising the professional use of insight and analytics in the sector. He has authored many papers on analysis topics, including several on loan to value, the use of data in legacy fundraising, and segmentation approaches. He has also spoken in many sector conferences. In 2012 Nigel co-founded Adroit Data & Insight, which works worldwide with many not-for-profits to benchmark and analyse data. Adroit is at the forefront of developing analytics solutions (including artificial intelligence) for organisations and increasing their fundraising income.

Chris Millward

Chris has over ten years' experience in managing charity legacy fundraising and administration. He has worked for both Macmillan Cancer Support and Save the Children. He was chair of Will Aid for three years and a member of the Institute of Fundraising's Special Interest Group for Legacies and In-Memory Committee, as well as Remember a Charity's Campaign Council. Chris is CEO at the Institute of Legacy Management, the professional body for charity legacy administrators in the UK.

Stephen Pidgeon

As a platform speaker, teacher and consultant, Stephen speaks and teaches throughout the world. Twenty years after setting up and running the UK's largest fundraising agency, Brightsource/Tangible, he now works with charities in the UK, Ireland, Norway, Canada and the USA. He has a special interest in stewardship and legacy marketing, as well as an interest (from a critical point of view) in looking at the way charities mistreat their supporters.

He is a visiting professor at the University of Plymouth Hartsook Centre for Sustainable Philanthropy, a trustee of the development agency Voluntary Service Overseas (VSO) and Chair of VSO Ireland. Stephen writes regularly and critically in the sector press and was given the Institute of Fundraising's Lifetime Contribution Award in 2015. His first book, *How to Love Your Donors... to Death*, was published in the same year.

Richard Radcliffe

For the past 30 years, Richard has specialised in legacies in positions such as Executive Chair of Smee & Ford, where he started the UK's first dedicated legacy consultancy. He sold Smee & Ford ten years ago and has since run his own consultancy.

Richard has met around 28,000 supporters and service users for over 500 charities to gain their perceptions of the charities they support. He has

researched will-making and legacy-giving traditions in over 30 countries, helping to develop strategies for large and small charities in the UK and internationally. He has been Chair of the International Fundraising Congress and Institute of Fundraising Convention for four years. He has conducted extensive research on donor happiness and how older generations make decisions about financial issues.

Fiona Riley

Fiona is Head of Legacy Marketing at the British Heart Foundation and has worked in fundraising for over 12 years. She has worked for charities ranging from national causes, including Scope and Marie Curie, to international organisations such as Save the Children (in the UK) and Animals Asia (in Hong Kong). Fiona has spoken on legacies at practitioner conferences. During her career, she has also been the chair of Will Aid and served on committees for Remember a Charity's Campaign Council and for the Institute of Fundraising's Legacy and In-Memory Giving Special Interest Group.

Claire Routley

Claire has worked in fundraising for 15 years, specialising in legacy fundraising for over a decade. In 2011, she completed a PhD looking into why people choose to leave legacies to charity. Having worked for a number of different charities, she is now a consultant specialising in legacy and in-memory fundraising, a research fellow at the University of Plymouth Hartsook Centre for Sustainable Philanthropy and a tutor for the Institute of Fundraising's qualification courses.

Ashley Rowthorn

Ashley Rowthorn is Managing Director of the Legacy Group, which includes Legacy Link (a legacy administration consultancy) and Legacy Voice (a legacy marketing agency). He is a highly knowledgeable legacy fundraising specialist with over ten years' experience in the sector. He has led the Legacy Marketing teams at Alzheimer's Society and Royal Voluntary Service, and is a regular speaker at Institute of Fundraising conferences and events. Ashley is a current member of the Remember a Charity Campaign Council.

Rod Smith

Rod joined Stone King LLP in January 2013 as a partner in the Trusts and Estates team in London. He specialises in advising on, and drafting,

complex wills and trusts, powers of attorney, applications for deputyship and the administration of trusts and estates.

Rod is a member of the Society of Trust and Estate Practitioners (STEP) and sits on the Law Society's Wills and Equity Committee and the Law Society's Money Laundering Task Force.

Paul Sutton

Paul is a partner and Head of the Dispute Resolution Team at Stone King LLP. He undertakes a broad range of work including breach of trust and general commercial and contractual disputes and has particular expertise in charity-related claims. Paul also has extensive experience of contentious probate and legacy dispute cases including Inheritance and acts on behalf of both private clients and charities in connection with such claims.

He is a member of the Association of Contentious Trust and Probate Specialists and of the Professional Negligence Lawyer's Association.

Sebastian Wilberforce

Sebastian is a process analyst working as a consultant in the not-for-profit sector in New Zealand. With the aim of helping to improve outputs, he works across governance and management systems, including fundraising. Sebastian has been an editor of this book since its first edition 20 years ago. At that time he was a legacy fundraiser for one of Britain's biggest charities, RNIB, having previously worked as a solicitor specialising in trust and charity law. Since then he has been a legacy fundraising consultant to many not-for-profit organisations in New Zealand and also brings experience from the commercial sector, having co-owned a multi-channel, consumer-focused business for eight years.

Justine Williams

Justine is a fundraising and marketing consultant and is undertaking a long-term contract as Director of Fundraising and Communications at Katharine House Hospice, Oxfordshire. Justine has held similar interim leadership positions at Practical Action, Riders for Health and the People's Dispensary for Sick Animals. Before moving into consultancy, she was Director of Income Generation at Garden Organic and spent 20 years working in other senior fundraising roles. Justine has also been Chair of the Institute of Fundraising's working group for the code of practice on legacy fundraising and has previously been a chair of Will Aid.

Katy Williamson

Having started a career in finance after graduating from the University of St Andrews, Katy quickly realised an altruistic life was much more appealing. In 2006 she began working in fundraising for the MS Society Scotland, where her knowledge grew thanks to a hugely supportive team. She went on to present a session on stewardship at the Institute of Fundraising conference before moving on to specialise in legacy fundraising at the British Red Cross in 2010. After six years there, Katy began to work in legacy fundraising with Cancer Research UK. After losing her father to cancer and seeing her mother saved by Cancer Research UK's research, this is something of a personal crusade.

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- Chapter 9: Smee & Ford
- Chapter 12: Ros Fry, Regional Legacy Manager, South West, at Cancer Research UK
- Chapter 13: Tenovus Cancer Care and the NSPCC
- Chapter 14: Marie Curie and Louise Pavoni, Digital Communications Manager, Remember a Charity

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- Fiona Riley: Remember a Charity
- Katy Williamson: The British Red Cross and Cancer Research UK

Sebastian Wilberforce's wife, Phillipa, died of breast cancer during the production of this book. He would like to thank his co-editor, Claire Routley, and the team at DSC for their understanding and support while he cared for Phillipa and was unable to focus on this project.

Foreword

The UK is a generous nation, but there is still so much opportunity: 35% of people surveyed in the UK say they would be happy to leave a gift in their will, compared with the 6.3% who currently do it.¹

The reality is that legacies aren't really about death at all, but an opportunity to shape the world beyond our lifetime. This is a hugely powerful, inspirational concept and one that forms the basis of the best legacy fundraising campaigns.

We have now begun to really understand the science behind *why* people give, thanks to leading academics such as Dr Claire Routley and Professor Russell James. Their insights in chapter 2 are a perfect introduction to this book.

But great legacy and in-memory fundraising is also about great leadership: about championing legacies at the very top of every organisation – which Stephen George (chapter 5) and Richard Radcliffe (chapter 10) advocate for superbly. And this is where this new edition of *Legacy and In-Memory Fundraising* comes into its own, successfully blending the rigour of research with the pragmatism of experience through the various perspectives of its contributors.

This book reads like a 'who's who' of some of the greatest legacy and in-memory fundraisers over the past decade. From crafting your case for support to creating conversations and from legacy forecasting to legal pitfalls – this book has it all.

I am also delighted to see that chapters on two new subjects have been added to this fourth edition, reflecting a changing market and an increasing confidence in encouraging legacy giving. Dan Carter (chapter 14) gives his tips on digital media, which has become an increasingly important channel (unheard of just a few years ago) for creating conversation, and Kate Jenkinson (chapter 16) gives her reflections on in-memory-motivated giving and fundraising, which is becoming increasingly important to many good causes.

But, beyond this practical advice for all fundraisers, this book offers something else – the chance to connect donors with the causes that they really care about. Ultimately, this means that the voluntary sector must not shy away from such conversations but instead shine a light on the

¹ *Legacy Trends: Discovering potential thorough data* [PDF], Smee & Ford, 2017, <https://smeeandford.com/whitepaper>, p. 2, accessed 30 December 2017. While legacy conversations need to be handled sensitively, we certainly shouldn't be afraid of them. Nor should we allow our fears to limit supporters' opportunities to choose to give through their will.

LEGACY AND IN-MEMORY FUNDRAISING

impact of legacy and in-memory income. My congratulations to all of the contributors in this book and to all those who successfully apply these insights to help charities' work live on.

**Rob Cope, Director, Remember a Charity, and Director of Development,
Institute of Fundraising**

Legacy giving in context

Meg Abdy

Introduction

Legacy Foresight, of which I am a director, has been analysing the UK legacy sector for over two decades, and the topic never ceases to fascinate and often move my colleagues and me. On the one hand, legacy incomes represent the accumulated decisions of thousands of individuals about the world they want to leave behind them. On the other, they reflect some of the greatest economic, political and social themes of our age. Understanding what drives legacy giving overall can help you to stimulate, manage and plan your own legacy fundraising.

Gifts in wills are a very important source of income for UK charities. In 2016, UK legacy giving was worth a total of £2.8 billion.¹ According to NCVO (National Council for Voluntary Organisations), legacies represent 14% of the fundraised income received by UK charities and 5% of all incoming resources.² For larger organisations it's more important still: across the 1,000 largest charities ranked by legacy income, gifts in wills account for 27% of fundraised income and 12% of total income.³

Of course, gifts in wills are not only financially important to charities but also emotionally significant. For many donors, a legacy is their largest and most heartfelt gift: a reflection of a deep-rooted, sometimes lifelong connection to a cause and a sign of their desire to leave the world a better place. That's why legacies *really* matter.

Despite its great monetary and cultural value, legacy giving is still a minority activity: today, just 6% of UK deaths result in a charitable bequest⁴ and those bequests represent just 3% of all the money left in estates.⁵ The challenge for fundraisers, working both as individuals and together as a sector, is to inspire more people to leave a gift in their will.

As every legacy marketer knows only too well, legacies often don't get the airtime that other forms of fundraising enjoy. In 2016 Legacy Foresight carried out an analysis of 36 leading charities, comparing and contrasting the ways they are investing in legacy marketing and how effective they are in generating a response.⁶ The study showed that despite legacies generating 38% of all fundraising income for those charities, spending on legacy marketing represented just 3% of their total fundraising budgets.

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Legacy and In-Memory Fundraising

Legacies and in-memory gifts are a crucial source of income for charities, as well as a fulfilling giving experience for pledgers. For fundraisers doing the asking it can also be highly rewarding, but you need to have the skills and know-how to hone your approach.

This groundbreaking guide brings together 24 of the charity sector's biggest thinkers and most experienced fundraisers to offer you sound, practical advice.

The fourth edition explores the strategies and techniques that fundraisers need to know. It also covers legal and ethical issues, as well as essential information on how to manage legacy income. It is packed with case studies and has been updated to take account of recent developments in:

- Legacy data analysis
- Digital communications and media
- New in-memory giving strategies
- Legacy administration systems

Whether you are new to the world of legacy fundraising or an experienced practitioner, this book will provide you with indispensable guidance on getting your fundraising right.

'Gifts in wills have the potential to change the world. This book is a great starting point to help fundraisers shape their legacy strategy, influence internally and understand the variety of ways in which they can raise awareness and inspire people to include a gift in their will.'

Dominique Abranson (Dip IDM), Legacy and In-Memory Manager, WaterAid and Chair, Institute of Fundraising Legacy Marketing and In Memoriam Special Interest Group

'It's great to see an updated edition of this fantastic book, which offers valuable insights from a number of different experts in the field. Irrespective of the size of your organisation or the extent of your experience, you'll find really practical takeaways that will enhance your fundraising practice.'

Craig Fordham, Director of Legacies, Macmillan Cancer Support



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