

Communication skills

For legacy fundraising

Dr Claire Routley

March 23



This session

- Thinking about your audience
- Developing your messaging
- Keeping your supporters engaged



Thinking about your audience

Who gives, why and what channels do they use



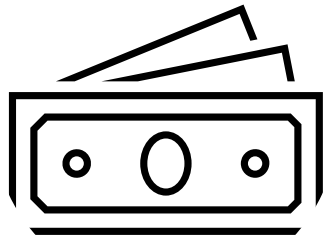
Writes last will aged
80

- Dies Aged 84
- Lives in South of
England

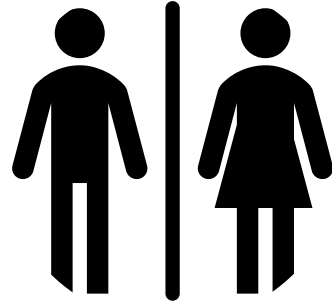
Smee and Ford 2020



There's more beneath the surface



Wealth



Gender



Age



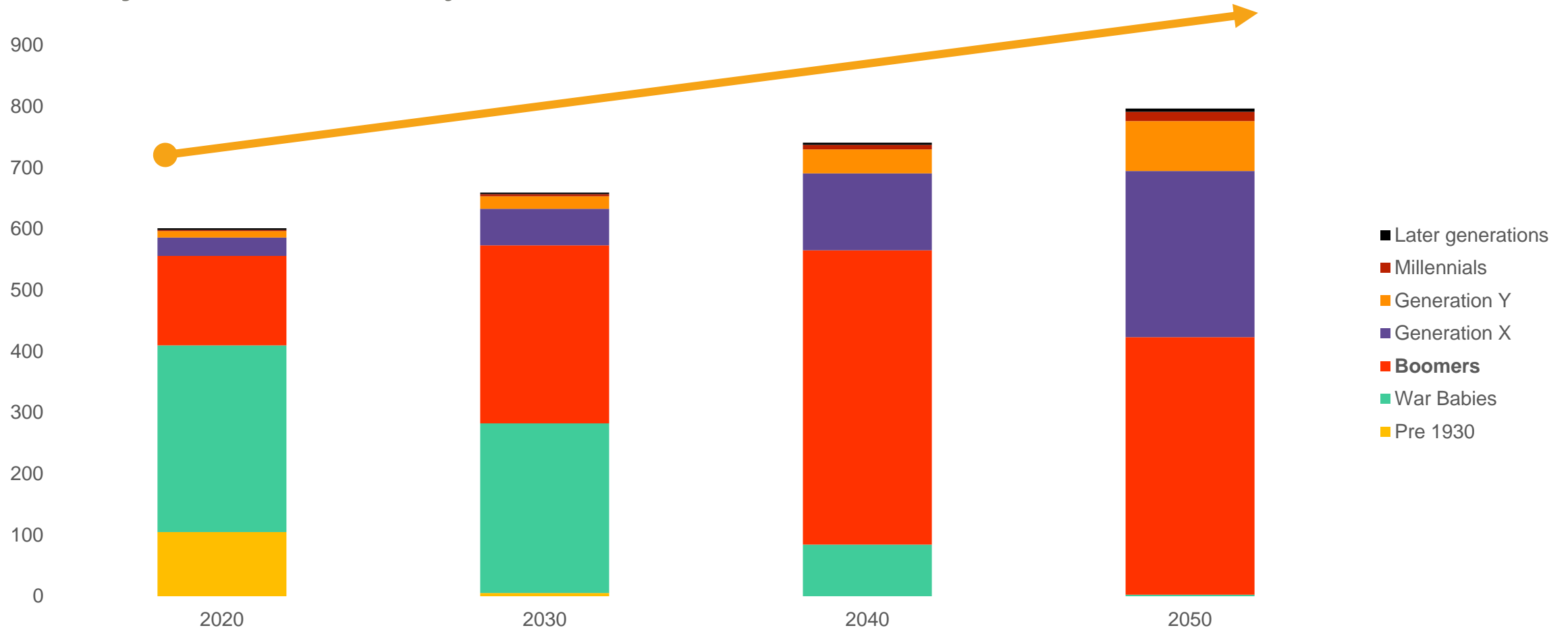
Children



Religion

Here come the boomers

Projected deaths by cohort, '000s, 2020 – 2050



Office for National Statistics

Boomers versus War Babies

Wealthier

More second homes
Better private pensions
More pension options
BUT widening polarisation between rich and poor

Healthier

Living longer
Healthy life expectancy rising
Males narrowing life expectancy gap
BUT polarising life expectancy dependent on wealth and region

Better educated

More with degrees
Fewer with no qualifications

Working longer

Men and women working longer but shift towards part time
Strong growth in self employment
Not just working for money but for purpose too

Your audience is online

...even more than 16-34 year olds



Here are a few numbers
to back this up:

Within people aged 55-64s:

- 94% use a cell phone
- 58% have a social media profile

Within people aged 65-74s:

- 92% use a cell phone
- 34% have a social media profile

Legacy gifts are motivated by



LOOKING BACKWARDS

- Giving to charities that reflect or have impacted their own life stories
- Often linked to remembering a loved one



LOOKING AROUND

- Social influence and social norming are important in legacy giving
- People will often research their chosen charity to ensure that their gift will be spend effectively



LOOKING FORWARDS

- Opportunity to live on beyond their own lifespan by associating themselves with a charity whose services and values will carry on into the future



Developing your message



What is a legacy proposition?

“

A clear, focused explanation of **what** you want supporters to do, **why** they should do it, **who** they will help and **how** leaving a legacy will bring meaning to the supporter.

”



Why do you need a
legacy proposition?





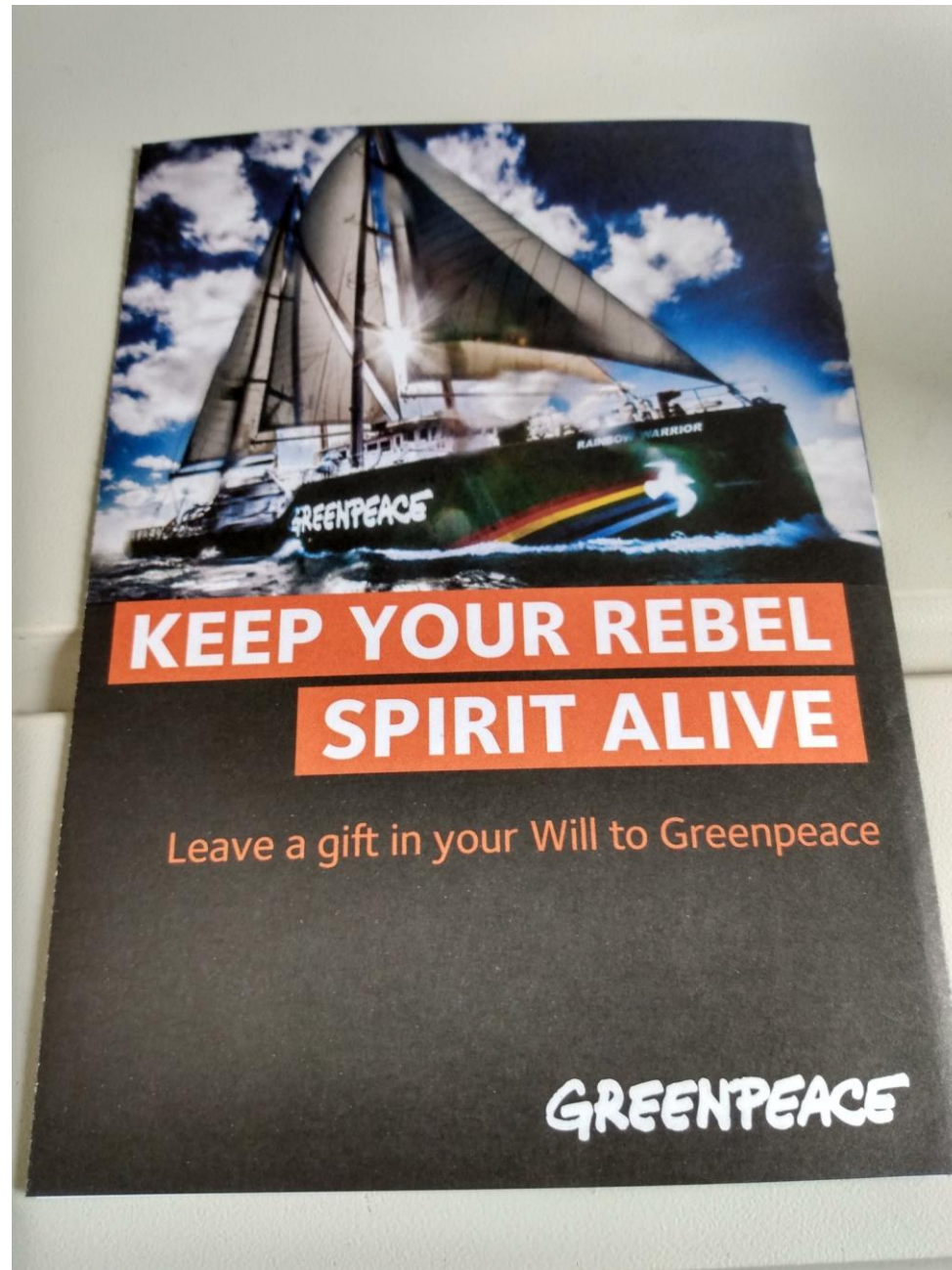


What we want you to do: *give*

What it'll mean for you: *ability to change the future*

Who we want you to help: *people*

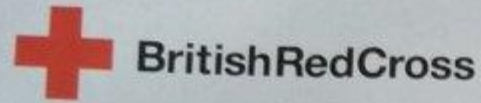
Why we want you to help: *need for change*



Before I let her go, I ask if she is anxious about the forthcoming election. Of course, she replies. But the way she handles that is by "making sure I'm doing everything in my power" to get the country back on track. There was a time when she was a cynic and thought the US was beyond saving, but over the last 10 years she has become profoundly hopeful. Now is the time to fight and to engage. Voting, she says, can also be a movement ■

...ome. Sometimes it would come for me. "Alicia!" my dad would bellow. "Make me some coffee!" I hated hearing it. Something about the demand to drop everything and run to the kitchen to make an able-bodied man a cup of coffee made me angry, deep in my spirit. I was a child, so it wasn't like I was doing anything important. But in my eight-year-old mind, that wasn't the point. My mother did everything in our home - she made sure the bills were paid, the house was clean,

...working hard for a better world. As an organiser, I am used to environments where women, usually women of colour, are carrying the lion's share of the work but are only a minuscule part of the visible leadership. The majority of our membership would be women - poor and working-class women of colour, immigrant women and queer women. But when men came to our community meetings, they would often take up the most space. They would »



BritishRedCross

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Comfort when it's needed most.
Hope when all seems lost.

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By leaving a gift in your will to the British Red Cross, you'll know that whatever happens in the world, we'll be there - and so will you.

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redcross.org.uk/mywill or call 0300 500 0401



150 years the power of kindness

The British Red Cross Society, incorporated by Royal Charter 1908, is a charity registered in England and Wales (220949) Scotland (SC037738) and Isle of Man (0752)



London c.1940-1945

Photo: ©IFRC Archives



Beirut 2020

Photo: ©IFRC, British Red Cross, National Geographic/EPA



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unicef UNITED KINGDOM
FOR EVERY CHILD

A GIFT IN YOUR WILL
TO CHANGE THE WORLD

BUILDING A BETTER FUTURE FOR EVERY CHILD

But how do we introduce into conversation?



What conversations do you have?



How can you integrate the legacy message?



NSPCC's examples



Seed number 1
Integrate into thank yous

THANK
YOU

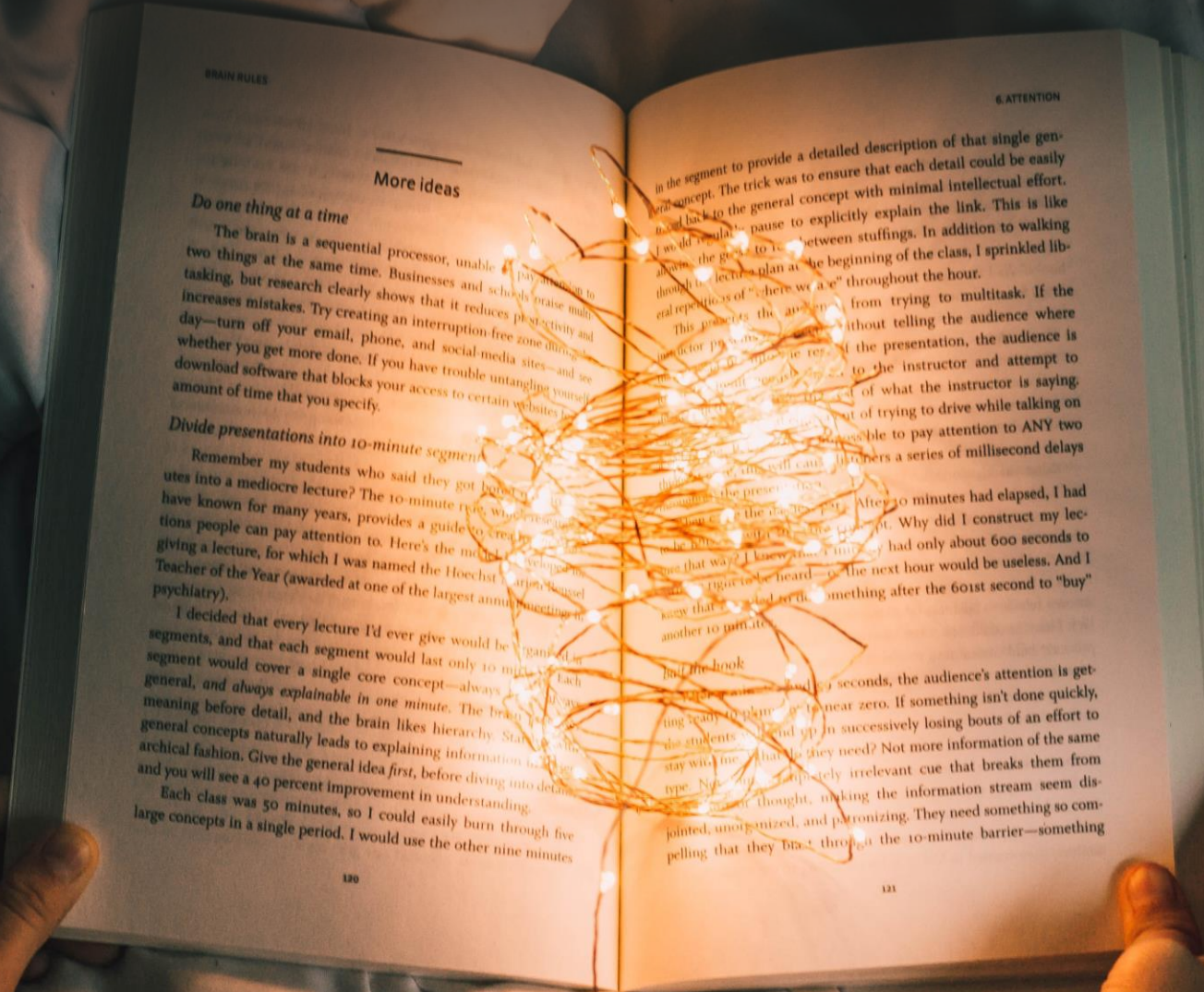
Seed number 2

Create conversation starters



Seed number 3

The 4S method



More ideas

Do one thing at a time

The brain is a sequential processor, unable to pay attention to two things at the same time. Businesses and schools prize multitasking, but research clearly shows that it reduces productivity and increases mistakes. Try creating an interruption-free zone during the day—turn off your email, phone, and social-media sites—and see whether you get more done. If you have trouble untangling yourself, download software that blocks your access to certain websites for a certain amount of time that you specify.

Divide presentations into 10-minute segments

Remember my students who said they got bored during lectures that lasted 45 minutes? The 10-minute rule, which I've used for many years, provides a guide to creating presentations people can pay attention to. Here's the method I developed in giving a lecture, for which I was named the Hoechst Career Counselor of the Year (awarded at one of the largest annual meetings in psychiatry).

I decided that every lecture I'd ever give would be organized into segments, and that each segment would last only 10 minutes. Each segment would cover a single core concept—always general, and always explainable in one minute. The brain likes to hear meaning before detail, and the brain likes hierarchy. Starting with general concepts naturally leads to explaining information in hierarchical fashion. Give the general idea first, before diving into details, and you will see a 40 percent improvement in understanding.

Each class was 50 minutes, so I could easily burn through five large concepts in a single period. I would use the other nine minutes

in the segment to provide a detailed description of that single general concept. The trick was to ensure that each detail could be easily traced back to the general concept with minimal intellectual effort. I would regularly pause to explicitly explain the link. This is like how we do regular pauses between stuffings. In addition to walking through the general concept at the beginning of the class, I sprinkled liberal repetitions of "here we are" throughout the hour.

This prevents the audience from trying to multitask. If the instructor provides a detailed description of the presentation, the audience is able to focus on the instructor and attempt to understand what the instructor is saying. The audience is not trying to drive while talking on a cell phone. It's impossible to pay attention to ANY two things at the same time. The brain will cause a series of millisecond delays

in the presentation. After 10 minutes had elapsed, I had to stop the lecture. Why did I construct my lectures that way? I knew that I had only about 600 seconds to get my message heard—the next hour would be useless. And I knew that I had to do something after the 601st second to "buy" another 10 minutes.

Find the hook

Every 10 minutes, the audience's attention is getting ready to plummet to near zero. If something isn't done quickly, the audience will end up in successively losing bouts of an effort to stay wide awake. What do they need? Not more information of the same type. Not any completely irrelevant cue that breaks them from their train of thought, making the information stream seem disjointed, unorganized, and patronizing. They need something so compelling that they blast through the 10-minute barrier—something



Keeping supporters engaged



Keep communicating

“ Wishart and James (2021) analysed deceased supporter data from ten Australian charities to explore whether those people who had expressed interest in bequest giving actually left a legacy. They were able to analyse which supporters had received communications from their charities in their last two years of life; amongst these who had received such communications, 76 per cent gave an estate gift, whilst amongst those who hadn't, 52 per cent generated an estate gift.

”

Make it personal

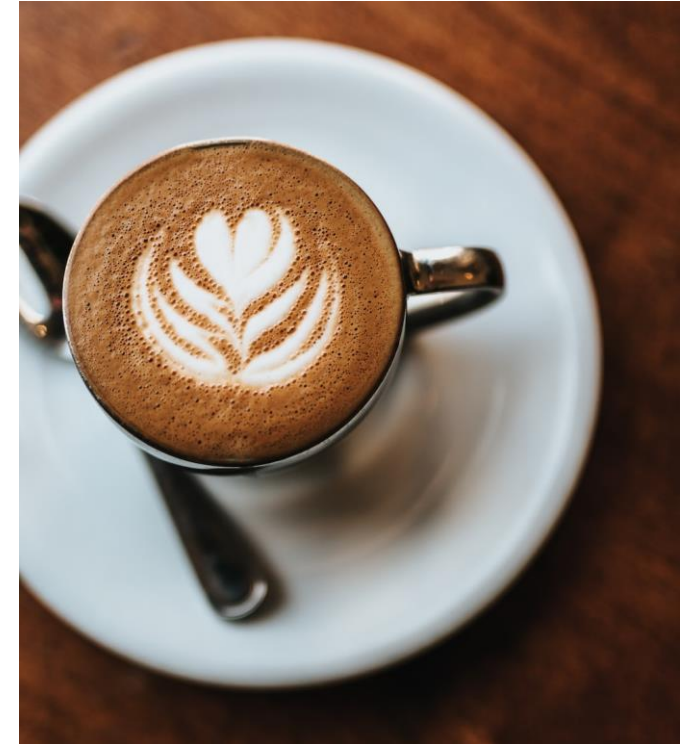
Legacy donors appreciated personalised communications such as handwritten notes or calls, as well as communications that communicated the impact of their gifts – and conversely, disliked overly generic communications. They valued contact with knowledgeable, trustworthy staff members who would connect with them once or twice a year.

Giving USA 2019



Show people they're valued

“I'm a bit of a coffee snob. So I've been going to coffee shops quite a bit. I'm just trying to think again, in the past, I think one thing that really got me...I'm talking four or five years back and I remember walking into a Cafe Nero and the assistant said to me, 'oh I remember your drink, you want abc'. And I just thought wow. So that, that was a really lovely surprise. The fact that somebody's actually remembered you, remembered what you like.”



Make it memorable

Add a touch of magic!



Thank you

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