

Dr Claire Routley

# GETTING STARTED WITH LEGACIES

A rectangular wooden sign with a light, natural wood grain finish is the central focus. The word "welcome" is written across the sign in a black, elegant cursive script. The background is softly blurred, showing a dark-colored teapot and a bouquet of red flowers to the left, and some greenery to the right. The overall lighting is warm and soft, creating a cozy and inviting atmosphere.

welcome

# Today:

- The legacy market
- Who leaves gifts in wills?
- Why people leave gifts in wills
- Creating your legacy messaging
- Legacy fundraising tactics
- Stewarding legacy supporters

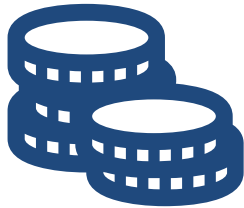
# THE LEGACY MARKET



helping you  
to help others

# Types of legacy gift

## Pecuniary



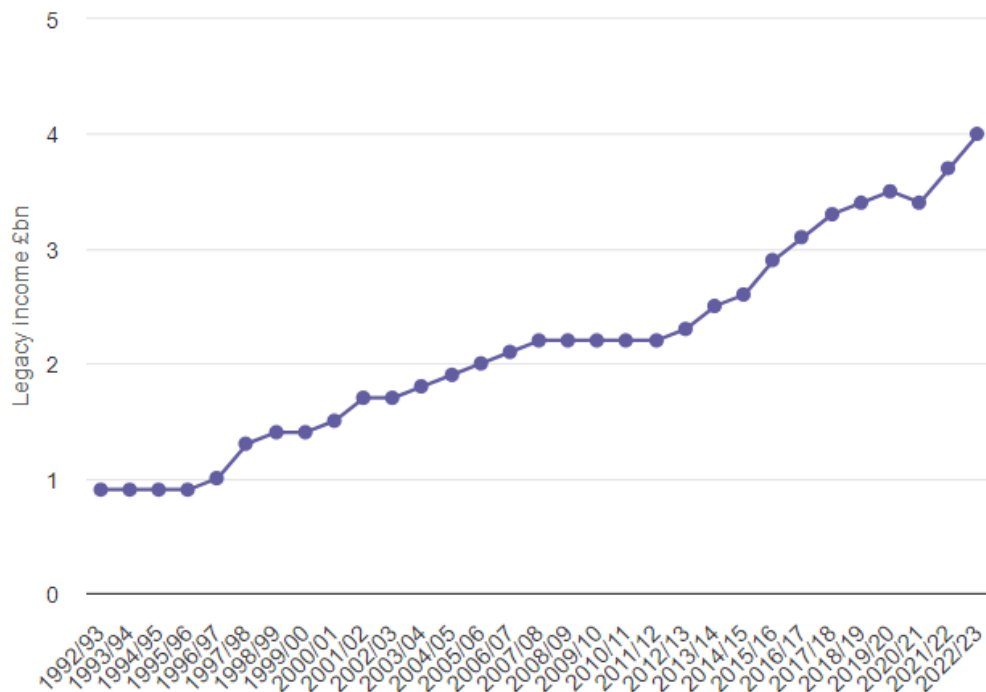
53% of gifts are cash  
Average gift around  
£3740

## Residuary

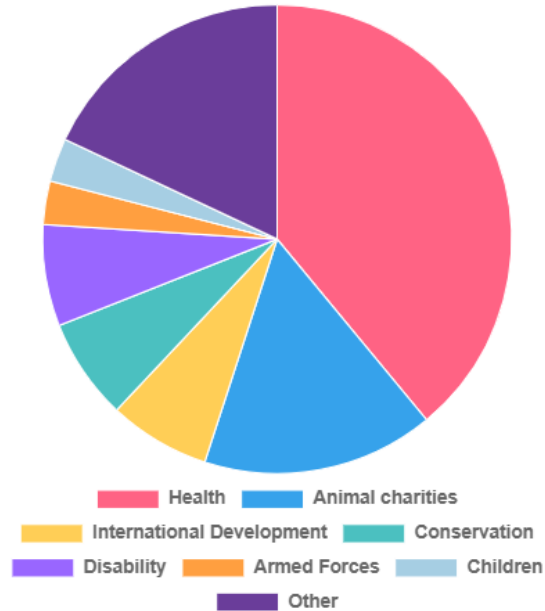


40% of gifts are a share of estate  
Average gift around  
£53,500

## Total UK Legacy Income, £bn



## Legacy sectors by size

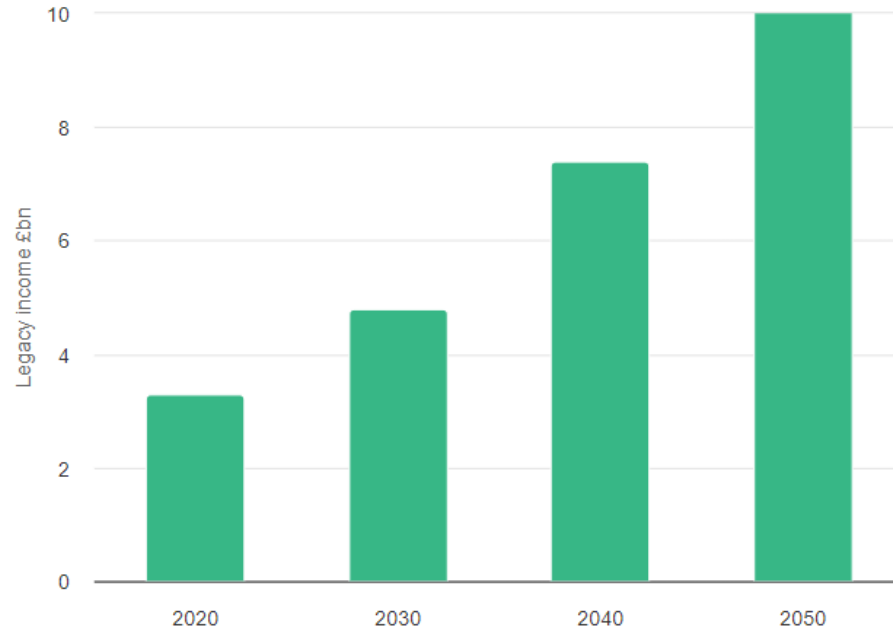


Top 1,000 legacy charities drawn from the Charity Commission Register of Charities 2021/22



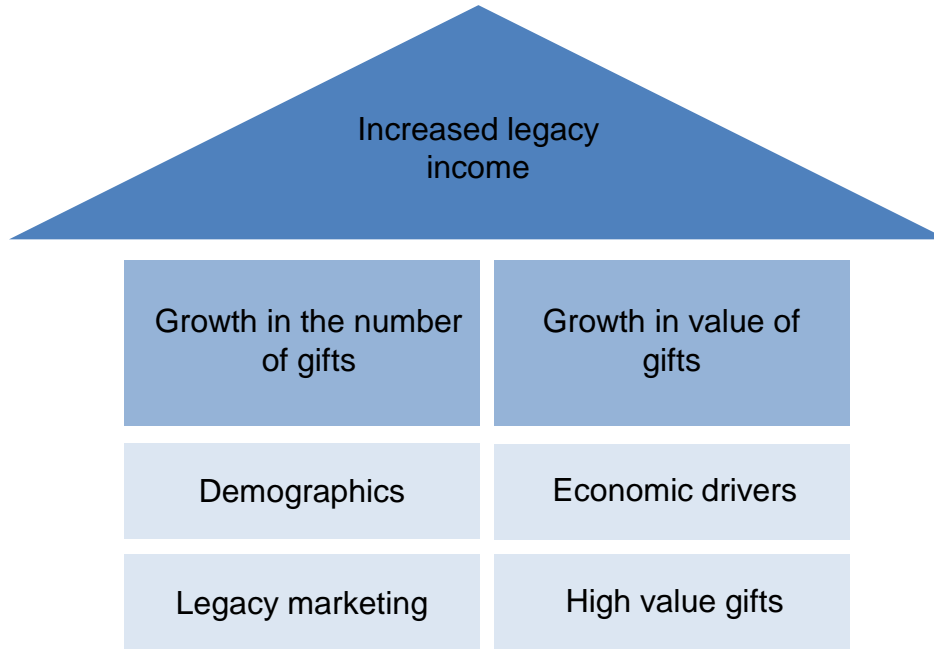


## Market forecast



Legacy income is forecast to remain stable at around £4bn per year for the next few years before returning to growth.

# Factors driving this growth



**dsc**

directory of social change  
Legacy Monitor Market Review 2022

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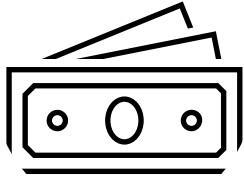
# WHO LEAVES GIFTS IN WILLS?

# What's your perception?

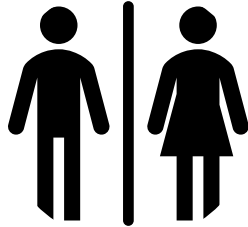




# There's more beneath the surface



Wealth



Gender



Age



Children



Religion

# Exercise: Who are your audiences?



Tea break



# WHY PEOPLE LEAVE GIFTS IN WILLS



Doreen  
Garcia

# 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

# CREATING YOUR LEGACY MESSAGES

# Case for support

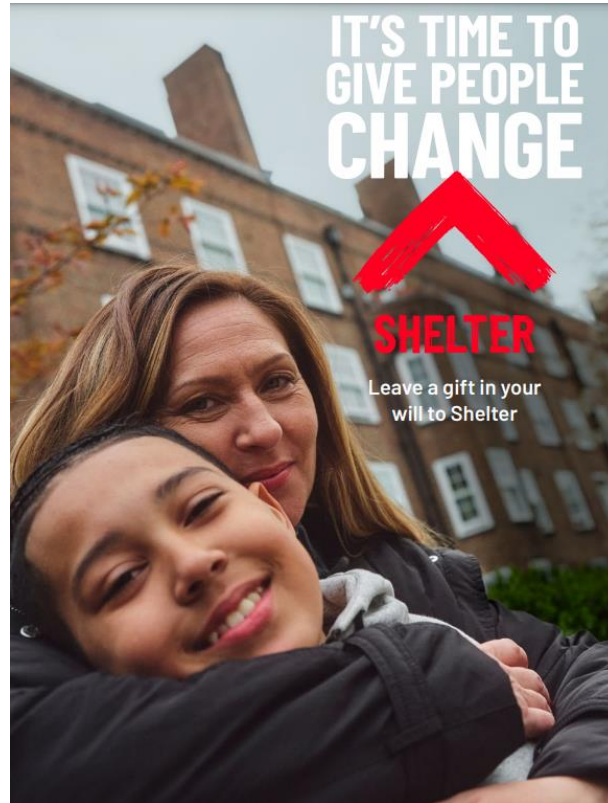
- Lets break the ho-hum barrier
- We're relevant in a broad context
- We're proud of our history
- Please read on...this is what's special about us
- A compelling future vision that deserves your attention
- What's in it for you?
- Do it now please...

Adapted from Raise-funds.com

# 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.

Anwar 2019





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*

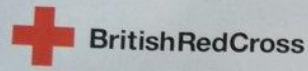




...in two minutes.  
 Before I let her go, I ask if she is anxious about the forthcoming election. Of course, she replies. But the way she handles that is by "making sure I'm doing everything in my power" to get the country back on track. There was a time when she was a cynic and thought the US was beyond 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. ■

...home. 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



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

Throughout our lives, the Red Cross emblem has been a constant symbol of hope.

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.

And as part of the **Free Wills Network**, you can make or amend your will for free - with no obligation.

[redcross.org.uk/mywill](http://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)



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Beirut 2020

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unicef  
UNITED KINGDOM  
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FOR EVERY  
CHILD

A GIFT IN YOUR WILL  
TO CHANGE THE WORLD

BUILDING A BETTER FUTURE FOR EVERY CHILD

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December 23  
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**Exercise:** What might your proposition be?





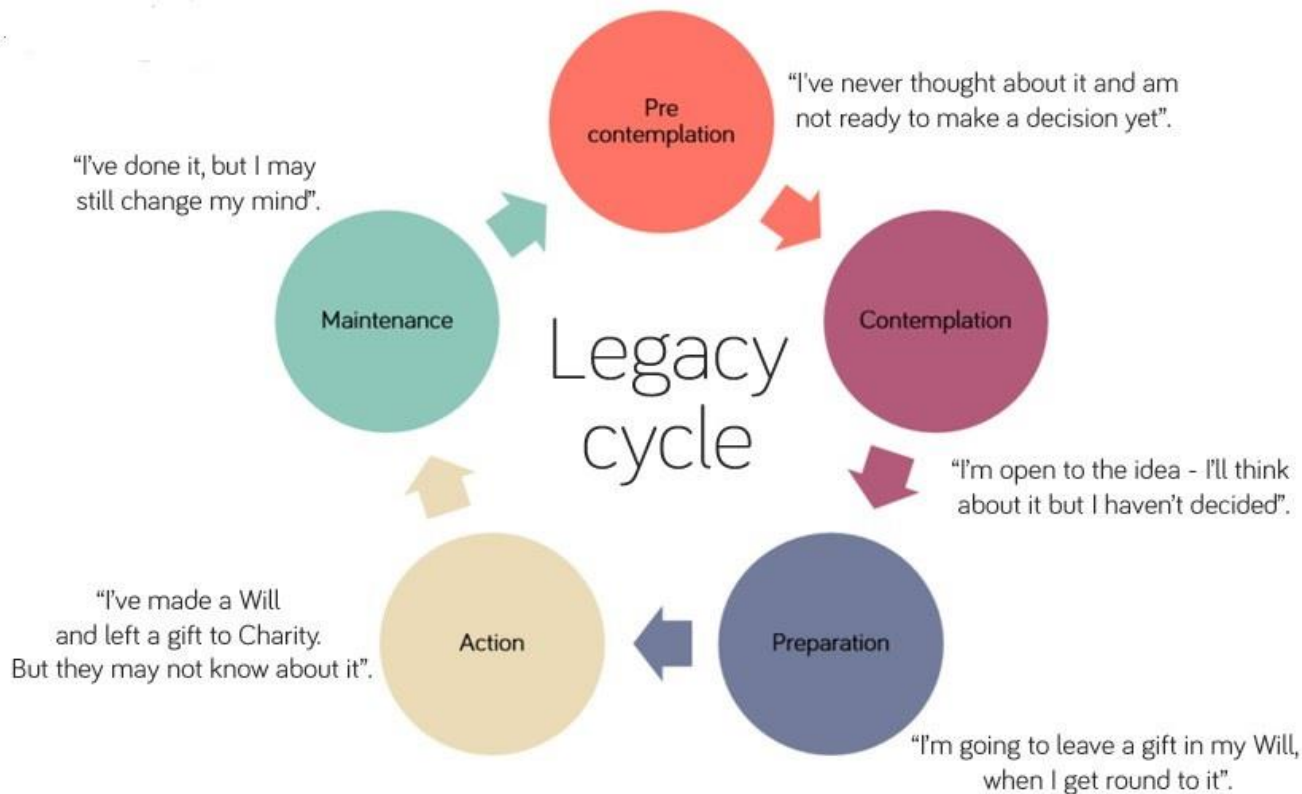
Lunch

# TACTICS



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# Thinking through tactics















Hot baths,  
long walks and  
chamomile tea

Inspiring stories of life, death  
and coping with cancer



AICR

# A mother's love

When I first came into contact with cancer – that word was taboo.

My mother had been ill for years. Nobody said cancer. But as I became an adult and had children of my own, I knew.

Mum was always very happy and never complained. In 1971, aged 71, she died. However, there was worse to come.

My eldest daughter, by that time aged 19, said something to me that I will remember forever. She said, "You know mum, it would just be my luck if it missed a generation and I got it." Many years later, when she was 46, she found a lump in her neck. She fought for five years but finally succumbed aged 51. "Why my girl?"

I will never get over it, *she loved life so much*. All I can do is help to fund research into cancer, which is why I support AICR.

*Katie Webb*







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### ENRICH FUTURE GENERATIONS WITH THE GLORY OF OPERA

You can leave a lasting legacy through a gift from your estate. Ensure your commitment to

### FREE ESTATE & GIFT PLANNING GUIDES



[Request Information](#)

### LEGACY GIFT TOOLBOX

[SAMPLE BEQUEST LANGUAGE](#)

[SAMPLE BENEFICIARY DESIGNATION](#)





## Contact Howard Barker, Head of Legacy Giving



Howard is here to answer your legacy enquiries. [Get in touch with the form below](#) or call him on 01793 418222.

Address: Bible Society, Stonehill Green, Westlea, Swindon, SN5 7DG

Charity Number: 232759

## Get in touch

Title\*

First name\*

Last name\*

Phone number

Email address\*

# Free Will Offers

**Draft your Will online or via telephone with:**



**Guardian Angel phone**  
0800 773 4015 Voucher code TVAAFREE



**Goodwill Partnership**  
Phone 0149 251 0340, telling them you are calling as a supporter of Thames Valley Air Ambulance



**Co-op Legal Services**  
Phone 0330 606 9578 Voucher code RACWILLS01



**National Free Wills Network**  
Alternatively, you can attend a free appointment with a local solicitor through the National Free Wills Network.

# Codicil form

After it has been completed, signed and witnessed, this Codicil legally includes a legacy to Action for Children in your will. We suggest that you keep the Codicil with your original will, and that you keep a copy of the Codicil with any copies of your will held by your solicitor or other people.



I,  ◀ Insert your full name

of  Postcode  ◀ Insert your full address

declare this to be a Codicil which I make to my will which is dated

the  day of  ◀ Insert the date you sign the Codicil – using words. For example, the **eightth** day of **March** in the year **two thousand and ten**

in the year

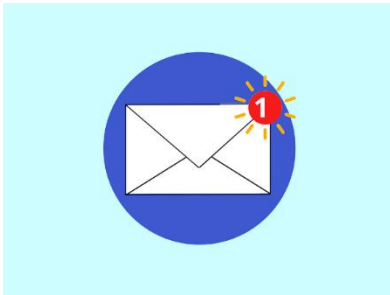
In addition to the provisions of my said will, I give to Action for Children,  
3 The Boulevard, Ascot Road, Watford WD18 8AG (Registered charity nos. 1097940/SC038092)

◀ Insert here the share of your Estate, or the amount of money (using words rather than figures), or the description of the item you wish to leave

Our next section...



# Channels





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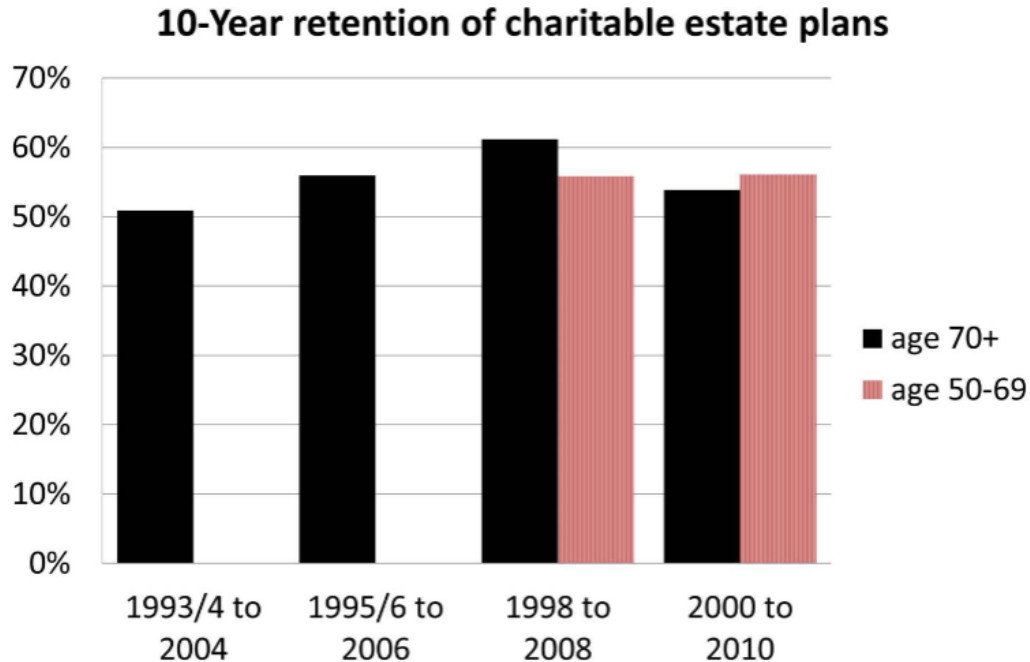
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**Exercise:** What collateral do you need to support your plans?



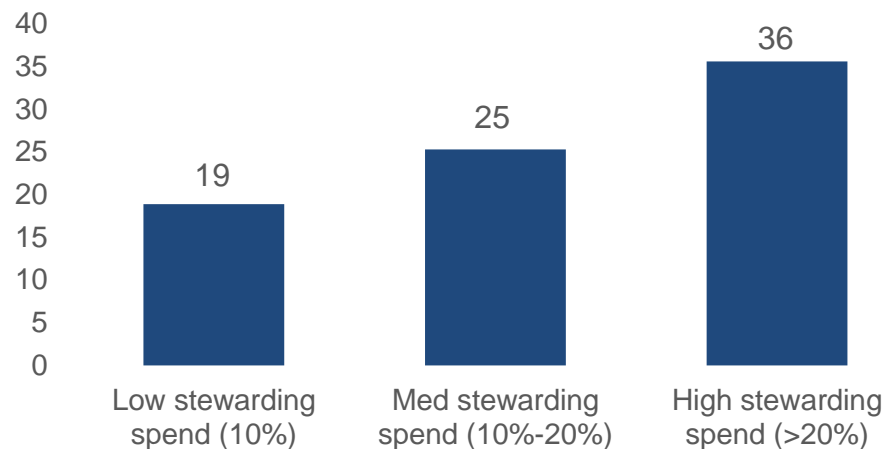
# STEWARDING LEGACY SUPPORTERS

# Why is stewardship important?



# More stewarding means higher values

Pledger bequest values by proportion of staff time on stewardship, £k, 13 charities



Legacy Marketing Benchmarking 2016/17

“...pledgers are generally **more demanding** than other categories of donor...Legacy pledgers exhibit a greater **concern for organizational performance** than other categories of supporter...Legacy pledgers appear to demand a higher degree of **service quality** from the fundraising organization. They expect both the **quality of communication and the responsiveness of the organization** to be of a significantly higher standard than other categories of supporter.”

Sargeant and Hilton 2005

## The National Trust for Scotland – a place to explore

Discovery Days offer exclusive opportunities to go behind the scenes and meet the experts at National Trust for Scotland properties. These events are fantastic days out and allow you to experience our conservation work first hand, while learning about the importance of gifts made in Wills to enable the safeguarding of Scotland's heritage.

Our experts will guide you through the property with thought-provoking insights, followed by a light lunch and short presentation about leaving a gift in your Will to the National Trust for Scotland.

In previous years, Discovery Days have proved extremely popular and we recommend early booking to avoid disappointment. As spaces are limited, we request you book just one Discovery Day in the first instance, to enable as many as possible to experience these events.

A small charge is made for refreshments, activities and any transport involved in the course of the Discovery Day. Please allow a full day for each event. Further details and directions will be sent once your booking has been confirmed. To book please telephone Michael Bauld (Legacy Officer) on 0131 458 0407 or email [legacy@nts.org.uk](mailto:legacy@nts.org.uk).



Please advise us of any mobility difficulties or specific needs before booking so we can ensure you get the most from your selected event.

## The Lorimer Studio at Kellie Castle Thursday 14 May

Scottish artist John Henry Lorimer (1856–1936) painted in Kellie from 1879, making his studio in the top room of the north-west tower. The inspiration he drew from the castle and its surroundings is apparent in many of his works. It has not been possible to open the studio to the public since the trust acquired Kellie in 1970, but now a project to restore and re-open the tower will give visitors a new insight into John's life and work.

With curator Antonia Laurence-Allen you will learn about the history of Kellie Castle, the story of the Lorimer family who made it their home and the transformative project to open this important space to the public for the very first time.

*Please note that the castle tour includes a number of steep spiral stairs.*

Maximum 16 participants  
£25 pp



## Perthshire Rangers and Forest Management at Killiecrankie Tuesday 26 May

Our properties in Perthshire include some exceptionally important native woodland, which our rangers and volunteers work hard to maintain as a vibrant ecosystem. Join the rangers in the Pass of Killiecrankie for a behind-the-scenes look at this important wildlife site, and learn about their work to protect and sustain this thriving habitat.

*Elements of this event are weather dependent. The forest walk will last approximately 2 hours.*

Maximum 20 participants  
£25 pp



A recent legacy gift to the Perthshire forests is supporting the active management of the habitat at Killiecrankie, allowing our conservation work to continue for years to come.

## Newhailes: the Archaeology of a Landscape Tuesday 16 June

Famous as a centre of the Scottish Enlightenment, Newhailes is less well known for the design of the surrounding estate and its archaeology.



However, through an intensive programme of investigation, Trust archaeologists have pieced together the 18th-century landscape. It demonstrates the major aesthetic trends of the time, including influences from ancient Egypt and the classical world as well as incorporating elements from nearby industrial Musselburgh.

Join archaeologist Daniel Rhodes to discover the story of the excavation works at Newhailes and how they fit in with the rich variety of archaeological sites in the National Trust for Scotland portfolio.

*Elements of this event are weather dependent.*

Maximum 20 participants  
£25 pp

## Footpath Conservation at Ben Lawers Tuesday 14 July

Over 394 miles of footpaths wind their way across the 46 Munros in our care. These require ongoing maintenance to enable sensitive access to some of Scotland's most stunning natural heritage sites. You are invited to join our Footpath Team for a behind-the-scenes look at their important work on the beautiful slopes of Ben Lawers. We will learn about the various techniques they deploy to preserve the fragile mountain habitats.



*This event is weather dependent and requires outdoor clothing. The upland walk will last approximately 2½ hours.*

Maximum 20 participants  
£25 pp

# 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.”







# Mona Webster, widow, 96

- 2009 left £4.5M to New York's Metropolitan Opera and £4.4M to the Wildfowl and Wetlands Trust.
- Her passions were the opera and birds so the donations not a surprise.
- But why the Met? Royal Opera got £100K — and she last went to New York in 2000?
- Met found out her other interests and each year sent her a gift to do with birds
- Also sent LP recordings of its operas because Ms. Webster did not own a CD or DVD player

# Make it memorable



**Exercise:** What unique experiences  
can you offer legacy supporters?



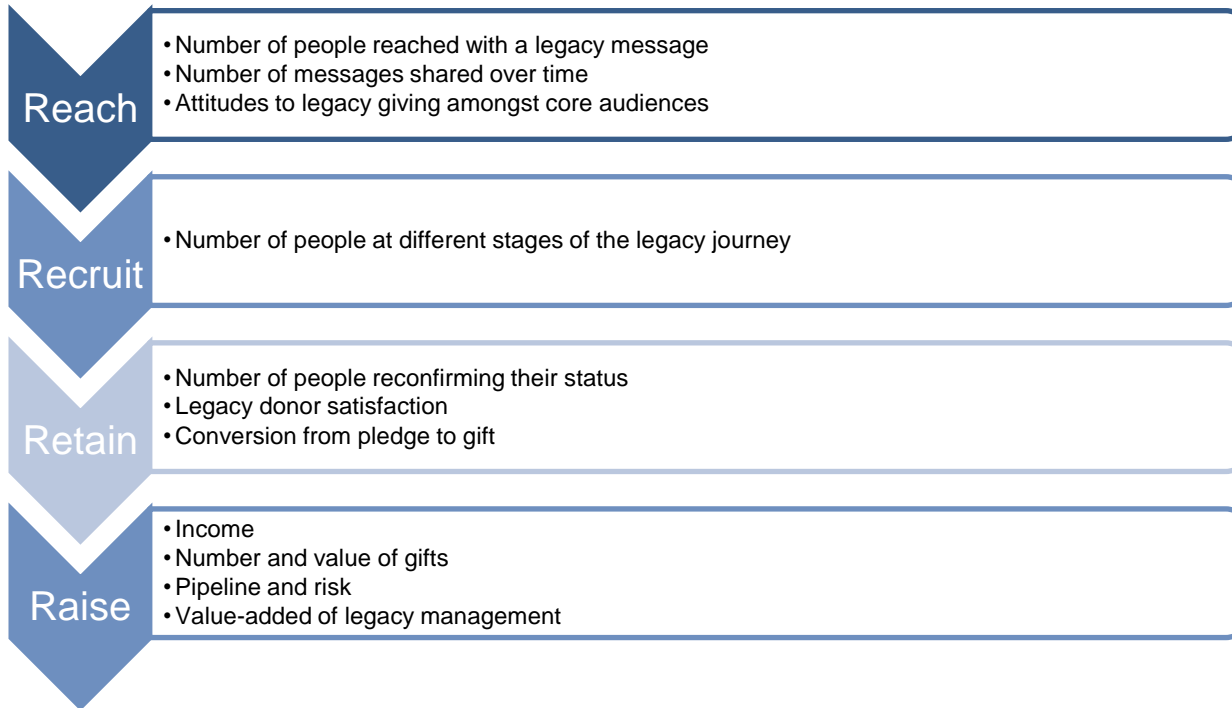
Tea break

# MEASURING LEGACY FUNDRAISING

**Exercise: What do you  
currently measure?**



# What to measure?



# Marketing activity

- Who responded?
- To what?
- Which tests worked?
- Are these results statistically significant?
- How did this translate into a) pledges and b) income?
- Who was contacted and didn't respond? And how did this translate into income?

Thank you so much!