



## Winning resources and support

### *Legacies in Fundraising*

#### **Terry**

Our first discussion is with Theresa Dauncey, at the time of the interview Campaign Director of the Legacy Promotion Campaign. The campaign has managed to unite over one hundred and twenty five UK charities and arts organisations in a concerted effort to raise the percentage of wills that include a gift to charity. The long-term vision is to establish leaving a charitable bequest as being the social norm. I began by asking Theresa if she could start by describing how organisations tend to fit legacies into their overall fundraising strategy.

#### **Theresa**

It's extremely difficult to say how different organisations fit legacies into their strategies because it varies immensely. For some organisations it's completely central, and for others it's a very low priority. However it should always be a high priority, as it represents forty per cent of income for the top ten charities and one point three billion pounds for the whole of the sector.

I believe that legacies are always a viable option for funding. Any organisation that has supporters has got the potential to get legacies, and legacies may be the most desirable and viable option for someone as a funder. What will change is how this need is communicated to different groups of donors, because it may be that there is some sensitivity around particular donor groups and the organisation will need to be more subtle in their marketing.

#### **Terry**

Do you think there's a reluctance to ask for legacies because of the inevitable link with the benefactors' death?

#### **Theresa**

Well for instance if you work for an organisation that deals with terminally ill people, there may be beneficiaries who also support the charity financially, and it may seem to be slightly insensitive to approach them very directly about legacies, whereas it may be completely appropriate to put information in the general newsletter that goes to all supporters of the organisation, when they can make their own decision they don't feel they are being very directly targeted.

It's quite a difficult process because for the majority of organisations they don't know who their legators are, quite often, so it is a very difficult process and what organisations can do, is make sure that there's a message about legacies in everything that they do, in some form or other. So be it in newsletters, be it in annual reviews, they need to make sure that anyone who has any contact with the organisation, knows what an important source of funds it is. What they can also do is, with their groups of supporters who are known to them, do some more direct marketing and give people more information about the potential impact of legacies.

#### **Terry**

How do organisations use research to help them grow their legacy income?

#### **Theresa**

In terms of research that organisations do around legacies and around people who leave them legacies it's very varied from case to case, so some organisations do very extensive research into the motivations of donors, the motivations of legators, the history of their donors and their pledgers, and others will do very, very little, they just let the legacies come in if you like.

I suppose the most important kind of research that organisations do is profiling of their current pledgers or their donor databases, because by doing this effectively they can find groups of people who fit a particular age profile and wealth profile so that they can target them for marketing because they are the most likely people to see this as a viable form of giving.

**Terry**

That's interesting. That suggests you can establish a relationship with your donor whereby they become more and more committed, and legacies are at the top of the pyramid, representing the ultimate commitment. How appropriate is that to your experience of legacy promotion?

**Theresa**

I think it's very appropriate where you've got an individual that you know is able or wants to give immediately. So they're starting with a donation and you can develop them through in the way discussed. I think it's also appropriate to find people who want to support an organisation and ask them immediately for a legacy pledge, and do the reverse if you like, so you could speak to them about supporting you regularly now, after they've made that pledge. And the other thing that I think is important to bear in mind is a point I made earlier, which is that quite often charities don't know who their legators are going to be. A lot of people don't tell the organisation that they've actually put them in their will, so that obviously makes it more difficult to develop them through a pyramid if they are anonymous.

**Terry**

What's the best way for an individual charity to promote this way of giving?

**Theresa**

There's so many things that organisations can do, and one of the most important ones I think, is to just put information out regularly, through their normal forms of communication with their donors and supporters and beneficiaries. So if they have supporter newsletters for instance, they can put a small piece in there, regularly about gifts that they've received or about how important legacies are, or the work that it's made possible, those are the kind of low key things they can do.

If they're feeling a bit more prepared to approach people directly, they can develop special leaflets, again, very much focusing on the need rather than on the process, I think there's again historically a lot of organisations have become very legal in the language that they use, and donors generally don't engage with that, so they need to be very careful about how they communicate. And they can also do things like identify groups of their supporters who they can talk to about legacies at events or in one to one communication.

The key factors I think are around stressing how important this source of income is and the impact it can have into the future. I think there has been a danger in the past that people really do talk about the mechanics of legacies rather than why we need them as a sector. The organisations who talk about that need and about the impact of legacies are the ones who tend to do best. The other thing I think that is very important is that people build up their own reputation in their local area or national area or whatever kind of region they operate in, so that again people know who they are, and it's very clear to them that when they go to their solicitor and they want to include a charity in their will they know who it is that they are including, they get the details right.

**Terry**

Are there any pitfalls that organisations should be aware of, in this kind of fundraising?

**Theresa**

Well I think it's a case of being very direct in the information that you provide and all the information we provide sends people towards professional advisors, so we don't get into the business of explaining what the different kinds of legacies are, or all of the implications of what kinds of different gifts there are, because the most important thing to communicate is why you need that money, and then leave it to the experts to actually draft the will. There is

also a danger that if people get too involved, that later down the line they may get some kind of blame or come back or say that they'd in any way influenced that individual, in a way that has detrimentally affected their other beneficiaries.

**Terry**

What kind of communication strategy would you suggest to an organisation wanting to improve its performance in legacy fundraising?

**Theresa**

The closer you start to home the better. So, I would always recommend that people make sure that staff and volunteers within their organisation are the first people to get briefed about the possible impact of legacies, whether or not they currently receive them, because they can act as ambassadors. They are in contact with everyone involved with the organisation and can make and ask or at least mention this form of giving. And then in terms of external communications, again it's starting with the people who are closest to the organisation, the regular donors, the regular volunteers, giving them the very basic information about legacies, and the impact they can have and perhaps using examples from other large organisations and the proportion they receive from this source.

Beyond that, I think there is a limited amount that people can do with the Press and that tends to focus on very relevant local stories or national stories if that comes up. Perhaps thanking people regularly for the kinds of gifts they've received, or running short stories or thank yous to people who, or families who, have left legacies and the kind of work that that's enabled the organisation to carry out.

**Terry**

The Legacy Promotion Campaign is an excellent example of a co-operative fundraising strategy, whereas we are used to the idea of fundraising being a highly competitive field. Was it difficult to get people to work together like this?

**Theresa**

Well it's been a very gradual process to get people to sign up to the campaign. It started a few years ago now with some of the larger organisations coming together and realising that really they were never going to shift public awareness of legacies unless they worked together and that kind of helped to propel others into joining up as well, and it's kind of carried on. People have just realised that there is a lot of sense in working together. We can achieve a lot more, and that there's a whole load of benefits for them, by working with us as well in terms of the learning they can get from our research and from the general promotion that we are doing.

I think probably the most important thing for people to remember is that actually only four per cent of the population leave legacies at the moment, and the most recent research has shown that what has been happening is that the legacies that there are, are being divided between more and more organisations and that kind of proves that competing with each other is counterproductive and what we really do need to do is to increase the number of people who are including legacies, so that everyone gets a bigger slice of the pie.