

Guide

How to develop a low-budget legacy campaign

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In the last 25 years the UK legacy market has more than quadrupled in value. Between 1988 and 2013, total British legacy incomes have grown from £0.46bn to £2.16bn.¹ The return on investment for legacy fundraising is 40: 1. A legacy campaign should be a part of the fundraising strategy for any charity, however large or small.

For the arts, museums and heritage sectors I think any organisation with a membership is well placed to develop a legacy campaign that does not require a large budget, but relies on good communication and good stewardship. The subject of this guide is about engaging with members to encourage legacy giving.

Members – a core legacy audience

Over the last fifteen years I have worked on legacy campaigns for War Memorials Trust, Imperial War Museums and the British Museum. The primary audience for all of these were the members. The reasons for this are:

- members are already engaged and interested with your organisation's work;
- by becoming a Friend or a Member and renewing their subscriptions they are already exhibiting goodwill towards your organisation;
- there is already a mechanism to communicate with them;
- there is already a structure to steward them.

Research

As with all fundraising, good research is integral to the success of a legacy campaign.

Data analysis

First of all you need to analyse your membership database and identify the following members as potential legacy donors:

- those who have been members for five years or more
- those who have donated to appeals that your organisation has held
- those who attend events regularly
- those who volunteer for your organisation.

It is important that you code these individuals on your database as potential legacy donors.

¹ Legacy Week, November 2014

Membership survey

If you regularly undertake membership surveys include a question about whether they may be interested in leaving a legacy to your organisation and give them the opportunity to contact you to find out more about it. In one membership survey I conducted more than 20% of members who responded said that they were interested in leaving a gift in their Will and several were kind enough to tell me that they had already done so. This gave us an opportunity to thank them and steward them appropriately.

Focus group

Bringing together a focus group of members and sharing your plans with them before launching a legacy campaign is very important. Their feedback can really help to inform the whole legacy campaign and ensure greater success. I would suggest that this focus group comprises those who you have already identified as being legacy prospects as well as those who have already stated that they would like to (or already have) left a gift to your organisation in their Will. Ask them how they would like to be approached about leaving a legacy and what types of communication they would find acceptable. If you have draft materials for your legacy campaign, such as a legacy leaflet or an advertisement in the members' newsletter this is an ideal time to show them and get feedback.

Communication

All communication about leaving a legacy should be done in a tactful and sensitive manner. A legacy appeal is quite different to a capital appeal to members. It is important that it is a very 'soft sell' and it must acknowledge that leaving a legacy is a big decision and you will give them the time and space to do that. It is also important to acknowledge that the person leaving a legacy will want to look after the needs of their loved ones first.

Leaflets

While a legacy leaflet is not essential I think that it can be a very useful tool as it outlines the importance of leaving a legacy and explains the different types of legacy which can be left. I would suggest that a legacy leaflet ideally contains:

- a message from the organisation's Director/Chairperson or a high profile Patron on why leaving a legacy is important and what can be achieved
- an explanation of the different types of legacy – eg. a residuary legacy (which is a percentage of the legator's estate) or a pecuniary legacy (a fixed sum). A residuary legacy is usually preferable as this does not depreciate over time
- a codicil form, if the legator wants to amend their existing Will to include a gift to your organisation

- signposting information – directing them to where they can obtain further information about writing a Will (usually their solicitor or the Law Society)
- a set of legacy promises – it is important to reassure them that if they change their mind or if their circumstances change that is understandable, that you will not contact them unnecessarily, and that you will give them time and space to decide whether to leave a legacy
- a form to complete to let you know they intend to leave a legacy, however it is important to make it clear that they are under no obligation to do so, but that if they do you would like an opportunity to thank them
- a disclaimer making it clear that the legacy leaflet does not constitute legal advice and for that they must contact a solicitor
- finally, it is important make the legacy leaflet accessible, written in plain English and avoiding too many legal terms and jargon

Website

It is, of course, important that leaving a legacy is promoted on your organisation's website. Unlike the leaflet the information should be succinct, but emotionally powerful and should clearly signpost the visitor to where they can obtain further information – ideally the person who looks after legacies in your organisation.

Newsletters

An article in the members' newsletter is an ideal place to promote leaving a legacy. After an introductory article you may wish to include articles about legacies which have been received and the difference which these have made to your organisation, and an article by a member who has already pledged a legacy. Regular articles will maintain awareness of your organisation's legacy campaign at no extra cost to you.

Direct mail

If the budget is available a direct mail legacy campaign can be effective, but I have personally found that regular articles in the members' newsletter or a legacy cultivation event tend work better.

Cultivation events

I have always found cultivation events to be very effective as it gives your organisation an opportunity to talk face-to-face with potential legacy donors and explain the importance of leaving a gift in their Will and to answer any questions or concerns which they may have. In a previous role I organised 'legacy afternoon teas' every six months for 20-25 members and

their guests and at each one between two and six people would advise me of their intention to leave a gift in their Will. If organising a legacy cultivation event I would suggest that:

- you find out through the focus group what time of day will suit your audience best – is it an afternoon tea or an evening lecture?
- to get an audience of 20 members and guests you invite 200 legacy prospects who live within two hours of your venue
- you invite some members who have already said that they intend to leave a legacy – it is an opportunity to thank them and they can also act as ambassadors for your legacy campaign
- one of the most important things is to be very clear that you are inviting them to an event at which leaving a legacy will be discussed – there must be no surprises for those attending and you must not risk offending them
- you make sure that there is a senior member of staff such as a Director or Chairman to give a welcome address, invite a member of the curatorial staff to talk about a specific project which they are working on which will engage the audience, and ask your Director of Fundraising to give a talk on the importance of leaving a legacy
- you allow plenty of time (and make sure that there are plenty of staff on hand) to talk to the guests one-to-one
- at the end of the event give each guest a ‘goody bag’ containing information on leaving a legacy, literature on your organisation’s future plans and a small gift relating to your organisation
- you follow up the day after the event with a letter from the Director thanking them for attending and advising them which member of staff to contact for further information

Stewardship

When a member pledges or expresses an interest in leaving a legacy it should be recorded on the database and the member should be thanked by a letter from your organisation’s Director. The members of staff who receive telephone calls from the members be made aware of who these individuals are. Every effort should be made that they are always dealt with in a particularly courteous manner and that they receive excellent customer service. Some organisations like to invite their legacy pledgers to a modest annual event such as a lecture and drinks reception and I think that this can provide a good opportunity to steward them and to cultivate prospective legacy donors.

Challenges

One of the perceived challenges which I have heard from some fundraisers is that they find a difficult 'ask'. I believe that research is crucial and if you can engage those who have given long-standing support for your organisation and that you are clear about what you are asking of them then they will not be offended, particularly if you have been raising awareness of your legacy campaign in newsletters. I have spoken to so many members about leaving a gift in their Will and almost all see it as a very practical decision. On many occasions members have told me that they were glad to be invited to a legacy event because they had been meaning to update their Will for some time.

It is also important to never budget for income from legacies as it is almost always impossible to predict when these may be received. However, when they are they are usually for a considerable sum so investing in a legacy campaign is very worthwhile.

Legacy fundraising has always been one of my favourite methods of fundraising because it is fulfilling the wishes of individuals to whom your organisation has been very important, but who may not have had the funds available to donate at a substantial level during their lifetime. A legacy gift confirms their passion and interest in your organisation and their investment in its future. I am always very humbled by those I meet who intend to leave a gift in their Will.

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