

In Conversation

Secrets of a legacy fundraiser

Ros Fry, Regional Legacy Manager, speaks to
Sara Lock, AMA Associate Editor



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Ros Fry from Cancer Research UK talks to AMA Associate Editor, Sara Lock

Secrets of a legacy fundraiser

Ros Fry shares her journey to becoming a legacy fundraiser and offers valuable advice for arts organisations considering legacies



Introducing Ros Fry

I started my career at The Commonwealth Institute, a museum in London about non-western culture. I became Head of Marketing, Press and Sponsorship before moving on to mainstream culture as Senior Press Officer at the Southbank Centre.

Moving to the South West in 1994 I devised the first arts marketing courses at Dartington College of Arts and dozens of CPD courses. I have trained 3,000 students, artists and arts managers, run two literary festivals and curated a creative industries exhibition.

In 2011 I became a fundraiser for Cancer Research UK and am now Legacy Manager for the South West. I moved sector because two very close friends developed breast cancer and I wanted to do something to help.

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In conversation

How did your previous experience lead you to becoming a Regional Legacy Manager?

Working as an arts marketing and leadership consultant/trainer I have travelled around the South West a lot so I am familiar with the geography, demographic and activities of the region and its communities.

Building rapport with audiences/supporters is relatively instinctive for me. I had no experience of developing legacy giving but I had eighteen months as a community fundraiser in Cancer Research UK before becoming a Legacy Development fundraiser.

Throughout my working life I have been interested in learning about new things... other cultures, classical music, contemporary dance... and now cancer research. Asking questions, not being afraid of saying I don't understand something, and then translating those messages effectively for audiences we are communicating with is how I always work.

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How did people react to your new role?

Some people feel awkward talking about Wills because they're inextricably linked to the end of our lives. Colleagues might joke about 'angel of death' or see it as a rather old fashioned way of fundraising. It's not innovative, not especially digital or twenty-first century.

How did you overcome that 'angel of death' perception? How do you stay motivated and keep making what many fundraisers consider the most awkward or difficult ask?

I always enjoy a challenge and so changing those stereotypes or allaying those fears is very motivating and I love it. My most blunt way of overcoming the perception is to show how much money can be raised and to point out how hard it is to raise that money in the ways that other fundraisers might be using.

£15 million was raised in my region last year... show me the money!

I stay motivated because every day in my role I talk to cancer survivors who thank me for what our charity is achieving. Our approach is to treat everyone who uses our free will service equally, even if they are leaving us nothing or very little. We are very careful not to be pushy

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or impatient. Sometimes I talk to supporters for more than an hour. I never put the phone down until they are happy with the way the call has gone.

Once you have got through the ‘end of life perception barrier’ then arguing the case for making a Will becomes an easy ‘product’ to promote. It is something that can help people in their life.

What is it really like to have that conversation with someone about leaving a legacy?

It is tricky but bringing in good listening skills, taking time and building rapport is the way forward. I have made my own Will and am able to sympathise with how difficult that can be. Many of my conversations with supporters are on the phone so before I ring them I imagine their environment, the weather, the sounds and sights. I have an idea about their age and I try to relax into the call.

We do not get into legal discussions but encourage the supporter to talk to a solicitor. My conversations are about shared lives. Sometimes I talk about the weather or my dog or my children! It is easier to have a conversation if you have something to invite the person to such as an event or activity. ‘Cold calling’ is a terribly abused marketing tool and makes all of our lives upsetting especially for elderly people.

How has your time working in the arts helped you in your current role?

The arts exist because of audiences. Effective artists or arts managers learn to mingle with their supporters and they enjoy the buzz of the live event, the nuances of interpretation, and the riskiness of exploring a concept or an idea. They don’t always have an endgame. They expect the unexpected.

At Cancer Research UK my ability to think creatively, to explore risks and situations and to create big activities out of small budgets has been recognised. In the cultural sector I was perceived as a marketing expert - a Blonde PR! Then sometimes a project manager and then a leadership facilitator – but overall not very creative unless you really got to know me. At Cancer Research UK I am celebrated for being creative. I have been encouraged to innovate with ideas such as ‘mindful telemarketing’ techniques or using musical instruments and costumes to break down barriers to talk about cancer.

What would be your advice to arts organisations that are just beginning to think about legacies? How can they get started?

Probably attending a course about legacy fundraising. I have not done this because I entered an organisation who knew a lot about

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it already and I was fortunate to be able to ask colleagues for help and advice.

When an arts organisation starts to legacy fundraise it would be good to start publicising the idea and to recognise exhibits, or activities which have been funded by gifts in Wills. This is quite easy to do but not thought about very much. Legacy fundraising is about long term security and in the arts we can be focused on short term goals.

What’s the real cost of managing a legacy relationship?

Mostly time. The marketing materials can be quite low cost. The relationship management could be done by volunteers

What can the arts learn from the wider charity sector?

- Really truly believe in what you are making or doing.
- Act on evaluation.
- If something isn’t working then stop doing it. Let unsuccessful ideas go.
- Thank your supporters as much as you can.
- Be absolutely honest.

