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 **LEGACY**  
**STRATEGY SUMMIT**  
Wilmington Charities

**11 June 2020 | London**



# Legacy Strategy Summit 2019

**08.45 – 09.30** Registration and coffee

**09.30 – 09.45** Housekeeping

**09.45 – 10.00** Chair's opening comments & case study: Lisa – a 101-year long story of donor loyalty and steady stewardship

**Joanna Ellams**, Head of Legacy Fundraising, **V&A**

**10.00 – 11.00** The trends shaping the UK legacy fundraising sector – a reality check

The last few years have been overshadowed by a perfect storm of challenges – lingering economic uncertainty around Brexit, its negative impact on house and share prices, and, closer to home, the considerable delay in probate service notifications.

*Is the landscape of legacy giving as rosy as we all thought? How much has it changed since Smees & Ford presented their 5-year trends back in 2018? Is the Baby Boomer generation proving to be as generous as expected – or have other external events diverted or diminished their estates?*

**We tackle these issues head on in an exclusive opening session – co-presented by legacy fundraising guru Richard Radcliffe and Mark Pincher of Smees & Ford – which will use a combination of the very latest Smees & Ford data and qualitative research gained from conversations with leading wealth advisors, solicitors and over 32,000 legacy pledgers.**

The findings will present a brand-new perspective on the future potential for the legacy giving sector and debate the external factors impacting potential future legacy donors' propensity to give. We will also look at which causal areas are currently receiving the most legacy gifts, from which locations and age groups, and how these trends might change with future generations of donors.

**Richard Radcliffe**, Radcliffe Consulting

**Mark Pincher**, Data Analyst, **Smees & Ford**

**11.00 – 11.25** Morning Coffee

## Streamed Sessions

### Building a Legacy Strategy

- Developing your legacy plan
- Finding resource & building a team
- Gaining senior level buy-in & financial support
- Spreading the word – marketing & legacy events

### Growing an Established Legacy Strategy

- Donorcentricity – next level stewardship
- Keeping it fresh – reviving interest in your legacy campaign
- Growing your legacy giving prospect pool
- Getting results – which channels bring in legacy gifts?

### 11.25 – 11.55 Session 1

#### Starting your legacy fundraising journey – a user guide

Building the foundations of a legacy fundraising strategy can be daunting, with key issues such as identifying first steps, galvanising internal support and how to maximise smaller budgets all vying for time and attention.

The session will offer a practical step-by-step guide on how to start or re-launch legacy fundraising in your organisation.

- Setting out the framework – developing a simple legacy strategy
- Defining your target audience
- Getting everyone on board
- Legacy marketing for smaller budgets
- Stewardship
- Measuring success

The session will also include a free handout – *The language of legacy strategy crib sheet*

**Kerry McMenamin, Legacy and In Memory Fundraising Manager, Target Ovarian Cancer**

### 11.25 – 11.55 Session 1

#### Donorcentricity – next level stewardship and adopting a donor centric approach

What do we really know about our supporters? In an era where many donors expect a more personalised interaction with the charities they support, how can legacy fundraisers adapt communication strategies to reflect a deeper level of donor understanding and enhance the supporter experience?

- Reflecting your deeper knowledge of your donor in all communications
- What is best practise stewardship?
- Developing a more donor focused journey

**Nigel Gorvett, Head of Legacies, Marie Curie UK**  
**Duane Saunders, Legacy Administration Manager, Marie Curie UK**

### 11.55 – 12.30 Session 2

#### Finding resource for your legacy strategy – how to get staff and volunteer engagement

An early step in any successful legacy fundraising campaign is to make the best use of the resources you already have, and secure staff and volunteer buy in.

We hear from a charity that is working closely with its team of volunteers and branch staff, to enable them to spread the legacy giving message and rejuvenate their legacy strategy.

- Finding your key brand ambassadors inside and outside of your organisation
- The conversation between legacy team and volunteer or supporter
- How this process can lay the foundations for your legacy strategy

**Sheila McGuinness, Head of Supporter Engagement, Samaritans**

### 11.55 – 12.30 Session 2

#### Keeping it fresh: reviving interest in your established legacy campaign

- How to identify when a legacy campaign needs reenergising
- Working collaboratively across key departments to help create the plan
- How internal culture can be the biggest barrier and how to instigate change

**Debbie Clark, Head of Legacy Development and Individual Giving, National Trust**  
**Helen Hoare, Head of Legacy Administration, National Trust**

## 12.30 – 13.45 Lunch

### 13.45 – 14.30 Session 3

#### Winning CEO buy in for your legacy strategy

Richard Radcliffe will give his practical advice on how to convince your Board to back your legacy fundraising strategy.

He will explain how to get the senior management team supporting your plan, and how to grow your legacy fundraising campaign to the next level.

- The purpose of CEO and Trustee buy-in
- Questions to ask your board
- How and when to request more financial support for your strategy – clarity and focus
- Putting forward a strong case for your strategy – techniques and tips

**Sheila McGuinness, Head of Supporter Engagement, Samaritans**

### 13.45 – 14.30 Session 3

#### Growing your legacy giving prospect pool

Since GDPR pushed many charity's contact data off a cliff, some organisations are now questioning if they were overly risk averse when originally dealing with the legislation.

- What methods are legacy teams using to expand and deepen their pool of potential legacy donors?
- What are legacy fundraising teams doing with their data?
- How to develop a comprehensive understanding of your legacy prospect pool
- Legitimate interest – how long should you really keep in touch with donors?
- Methods of data capture "carrots" – free Wills, awareness raising, in mem campaigns and more

**Jacob Clarke, Senior Legacy Manager, Diabetes UK**

### 14.30 – 14.55 Session 4

#### Building your Marketing and Communications (two-part session):

##### A. Choosing the right communications strategy for different donor audiences

Which cost-effective communications channels should a growing legacy campaign use, and what are the benefits and risks of each type of communication when reaching different audiences?

##### B. Running a successful legacy event

Long seen as a proven method of attracting potential legacy donors at the right point in their life, are legacy events worth the cost and effort? Who should be invited and how should they be organised to achieve best outcomes?

- What is the aim of a legacy event?
- Who to invite – which donors – and how?
- Logistics basics – invites, food, accessibility
- Event formats & key messages for all staff
- What makes a successful event?

**Clare Sweeney, Individual Giving and Legacy Fundraiser, St Anne's Hospice**

### 14.30 – 14.55 Session 4

#### Focus on Marketing and Communications:

##### Getting results – which channels actually bring in legacy gifts?

- With a seven-year average gap between a Will being written and coming to fruition, legacy marketing professionals need to look back over decades of previous campaigns to see what method has worked when and why.

This session will explore:

- What constitutes a successful marketing strategy?
- Should campaigns be assessed by their reach and response rates, rather than actual legacy outcomes?
- Which comms channels are most cost effective compared to income return?
- Should we be moving to digital first strategies?
- Legacy marketing & segmentation – which comms work for which audience type?
- Channels that should work but don't – when to change direction

### 15.20 – 15.40 Afternoon Tea

#### 15.40 – 16.10 The benefits of talking about death: the role of online and free wills in legacy fundraising strategy

With several Will writing products and online platforms now established in the marketplace, offered by both charities and private companies, we debate what online and free Wills are contributing to the legacy fundraising sector.

- Will online Wills cause the inevitable slow death of the traditional Wills sector?
- Are online Wills a way of reaching younger donors and getting early stage pledging?
- Free Wills – role of liaison with the legal profession and other user guidance
- How can charities keep in touch with online Will users?

**Lee Grant, Senior Legacy Partnership Manager at Cancer Research UK, CRUK**

#### 16.10 – 16.45 The Holy Grail of legacy fundraising: converting donors into legacy givers

From lifelong direct debit givers, to one-off pledgers, to new In Memoriam donors – how can legacy fundraisers convert the wide range of donors into becoming future legacy givers – and when should legacy fundraisers broach the delicate subject of leaving a gift in a Will?

This session will offer fresh new perspectives & real-life case studies on:

- What charities can legally do to steward donors and In Mem givers towards considering a legacy gift?
- Education and stewardship – what does this look like for In Memory donors and pledgers over a decade long relationship?
- How to convert a donor's interest in a person to an interest in the charity
- The Pledger Project – new data on the actual conversion rates from pledgers to legacy givers and how fundraisers can use this information

Case studies followed by a discussion by four participants:

**Tara Bean, Interim Head of Supporter Engagement, St Gemma's Hospice**  
**Jordan Hughes, Legacy and In Memory Marketing Manager, RAF Benevolent Fund**  
**Georgina Hyman, Senior Legacy and In Memory Manager, Alzheimer's Research UK**

#### 16.45 -17.00 Chairs closing remarks & end of conference

#### 17.00 -18.30 Networking Drinks Reception sponsored by Shakespeare Martineau