



LEGACY
STRATEGY SUMMIT
Wilmington Charities

Legacy Strategy Summit 2019

13 June 2019 | London

Taking your strategy to the next level



Legacy Strategy Summit 2019

Event overview

The Legacy Strategy Summit 2019 is the leading strategy event in the charity sector for professionals and experts in legacy fundraising. The summit will give you the unique opportunity to hear first-hand from a wide range of charities at different stages in their legacy journeys, as well as to discuss varying strategic approaches to legacies.

NEW for 2019, we have updated our event format to include even more opportunities for charities to network and build strategies. This year we will feature a range panels and case studies followed by interactive breakout sessions which you can pick and choose to tailor your own legacy strategy programme or needs.

08.45 – 09.15 Registration and refreshments

09.15 – 09.20 Welcome from Wilmington Charities

09.20 – 09.30 Chair's welcome and opening remarks

Fiona Riley, Head of Legacy Marketing,
British Heart Foundation

09.30 – 10.10 Opening panel: Adapt and evolve your legacy strategy

Come together with legacy directors from across the sector who are all at different stages in their legacy journey. Discuss the different strategic approaches to legacies and explore the changing issues and challenges they face. For example: how to set key objectives; how to create an inspirational legacy message; how to work with limited budget and resources; how to make legacies a whole-organisation issue; and how to set metrics to measure success or manage expectations. This is a great opportunity to tap into the knowledge and experience of other experts in the sector.

Moderator: **Fiona Riley**, Head of Legacy Marketing,
British Heart Foundation

Julia Brown, Head of Legacy Giving, **V&A**
Sarah Dalling, Senior Legacy Manager, **Blind Veterans UK**
Louise Timbrell, Head of Legacy Management & Development,
NSPCC

Tish Ley, Legacy Engagement Manager, **The Guide Dogs for the Blind Association**

Scene setting case studies

The following case studies will introduce the themes for the workshops taking place later in the day.

10.10 – 10.25 Legacy investment strategies

Ellen Hingley, Head of Legacies, **Alzheimer's Society**

10.25 – 10.40 Develop your social media strategy to boost legacy engagement

Katie Wimpenny, Legacy and In Memory Manager,
St Mungo's

10.40 – 10.55 Focusing on will awareness and education

10.55 – 11.10 Cultivation and stewardship: Move interest to action

Caroline Reynolds, Legacy and Projects, **University of Oxford**

11.10 – 11.25 Legacy proposition: build a case aligned with your charity mission

Kelly Jack, Senior Gifts and In Memory Officer,
The Brain Tumour Charity

11.30 – 11.50 Morning coffee

11.50 – 12.35 Breakout session 1 (delegates to attend one of A, B or C)

12.45 – 13.30 Breakout session 2 (delegates to attend one of B, D or E)

13.30 – 14.45 Lunch

14.45 – 15.30 Breakout session 3 (delegates to attend one of A, C or D)

15.30 – 15.50 Afternoon tea

15.50 – 16.30 Closing panel: Where next for legacies?

- Future-proofing your legacy strategy
- As a sector, what works well and where are the areas for improvement?
- The future of Wills and impact on legacy fundraising
- Taking your legacy strategy to the next level

Moderator: **Fiona Riley**, Head of Legacy Marketing,
British Heart Foundation

Craig Fordham, Director of Legacies,
Macmillan Cancer Support

Jas Chahal, Senior Manager, Legacy Marketing,
Canal & Rivers Trust

16.30 – 16.45 Chair's final remarks and close of conference

16.45 – 18.00 Networking drinks reception

Breakout sessions

Three 45-minute breakout sessions will run concurrently at 11.50 (session 1), repeated at 12.45 (session 2) and then following lunch at 14.45 (session 3). The breakout session will provide delegates with the opportunity to come together in smaller groups to share practical knowledge, expertise and experience. Delegates can choose a total of three sessions (from the five different topics covered) to attend from the below. These will be allocated on a first come, first served basis.

11.50 – 13.30 Breakout session 1 (delegates to attend one of A, B or C)

12.45 – 13.30 Breakout session 2 (delegates to attend one of B, D or E)

14.45 – 15.30 Breakout session 3 (delegates to attend one of A, C or D)

Breakout A

Developing a social media strategy to boost legacy engagement

- Recruiting the right people
- Influencing the whole charity on the importance of social media/digital tech
- Inspiring and engaging new audiences
- Identifying and measuring success

Co-chaired by:

Katie Wimpenny, Legacy and In Memory Manager, **St Mungo's**

2nd chair: Speaker to be confirmed

Breakout B

Investing in legacies

- Research, resource management and reporting
- Budgeting and forecasting legacy income
- Dealing with Brexit uncertainty

Co-chaired by:

Ellen Hingley, Head of Legacies, **Alzheimer's Society**

Breakout C

Focusing on cultivation and stewardship to move interest to action

- Defining cultivation and stewardship
- What does good stewardship look like?
- Are you asking the right questions?
- The importance of 'thank you'
- Measuring impact and effectiveness

Co-chaired by:

Caroline Reynolds, Legacies and Projects Officer, **University of Oxford**

Alexis Fairclough, Senior Legacy Partnership Manager, **Cancer Research UK** and Chair, Legacy Liverpool

Tish Ley, Legacy Engagement Manager, **The Guide Dogs for the Blind Association**

Breakout D

Building a creative legacy proposition aligned with the charity mission

Co-chaired by:

Richard Radcliffe, Founder, **Radcliffe Consulting**

Joanna Ellams, Associate Director, Individual Giving, **Kew Foundation**

Kelly Jack, Senior Gifts and In Memory Officer, **The Brain Tumour Charity**

Breakout E

Focusing on Will awareness and education

