

TOP TIPS

Developing a Low Budget Legacy Campaign

1. Consider the primary and secondary audience for legacy communications:

- a. Primary: Members, Friends, Volunteers, Depositors
- b. Secondary: Regular service users, engaged local public

2. Research

- a. Data analysis: First of all consider your membership database and identify the following members as potential legacy donors:
 - i. Those who have been members for 5 years of more
 - ii. Those who have donated to appeals that your organisation has held
 - iii. Those who attend events regularly
 - iv. Those who volunteer for your organisation
 - v. Those who are depositors

Code these individuals as potential legacy donors.
- b. If you regularly undertake a membership survey, include a question about whether the recipient may be interested in leaving a legacy to your organisation, and give the opportunity to contact you to find out more about it.
- c. Bringing together a focus group of members and sharing your plans with them before launching a legacy campaign is very important. The feedback can help to inform the whole legacy campaign and ensure greater success. The focus group should comprise of those already identified as 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 the group 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.

3. 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.

a. Leaflets

While a legacy leaflet is not essential 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. 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 the recipient to where further information can be obtained (usually their solicitor or the law society)

A set of legacy promises – it is important to reassure the individual that if they change their mind or if their circumstances change that is understandable, you will not contact them unnecessarily and that you will give them time and space to decide whether they want to leave a legacy.

A form to complete to let you know they intend to elave a legacy, however it's important to make it clear they are under no obligation to do so.

A disclaimer making it clear the legacy leaflet does not constitute legal advice and for that they must contact a solicitor

Ensure the leaflet is accessible, written using the Plain English guide and does not contain jargon.

b. 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.

c. 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.

d. Direct Mail

If the budget is available a direct mail legacy campaign can be effective, but evidence suggests that regular articles in the members' newsletter or a legacy cultivation event tend work better for smaller organisations.