

fundraising ireland



Making legacies dead easy!

by the slightly strange but deeply practical

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Remember

- *“To be persuasive we must be believable;
to be believable we must be credible;
to be credible we must be truthful”*

Ed Murrow





Smee & Ford

Legacy strategies

- **Research** competition, statistics, past legacies and then attitudes, motivations through focus groups.
- **Internal need** and awareness
- **External case for support** and legacy/will making messages
- **Strategy development** aim, objectives, target audiences, methods of communication
- **Build relationships** defining and fulfilling communication needs
- **Set resources and budget**
- **Evaluation** - is it possible?



Talking legacies

- A legacy is a joyful act, and only one method of giving - one which is life driven and only death activated



A decade of the charitably decayed in England and Wales

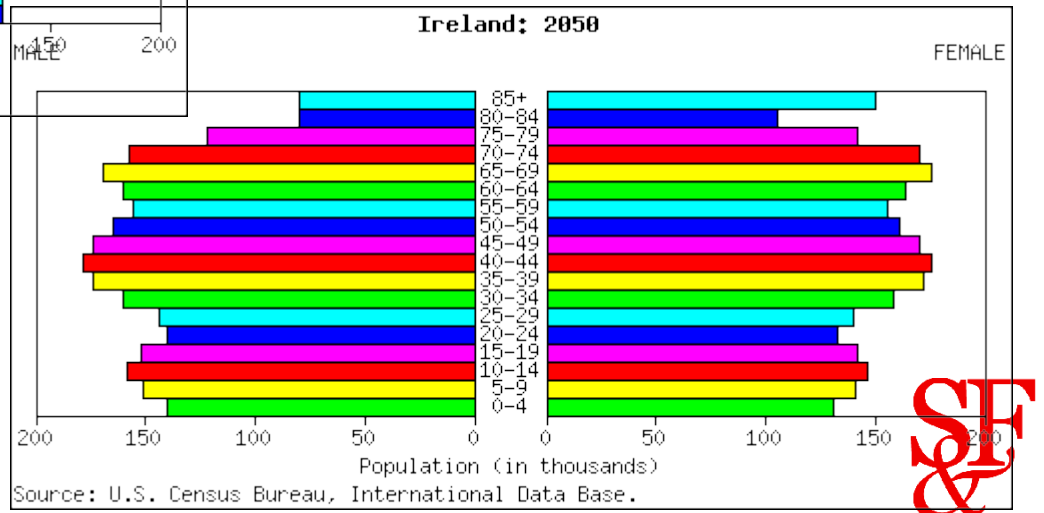
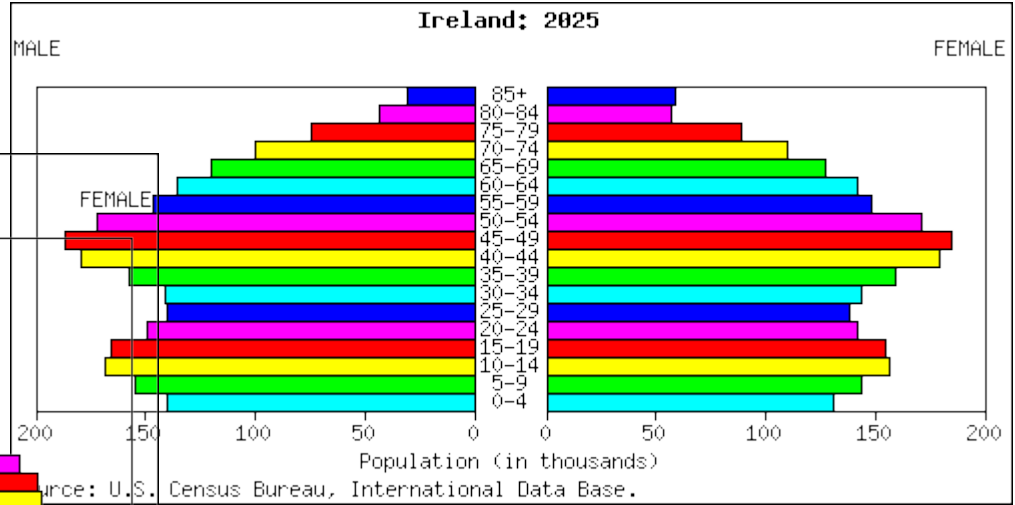
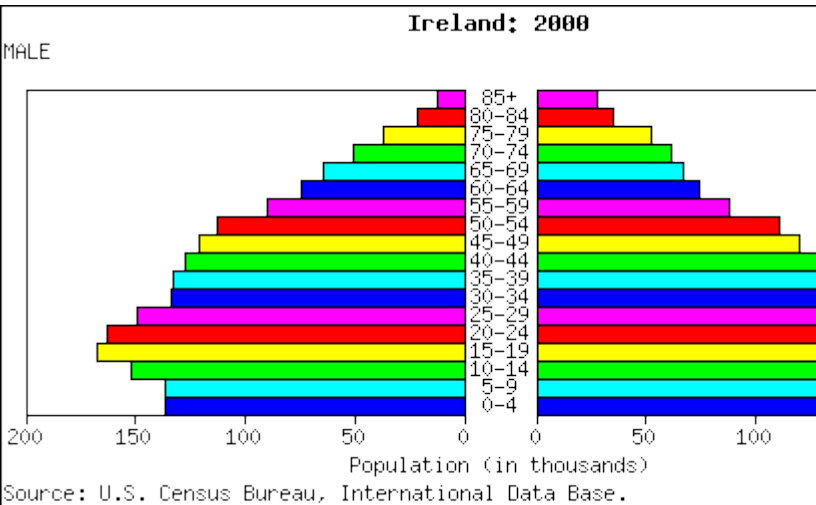
	1991	2002	(2006)
• Population	51.1m	51.8m	(50.4)
• Deaths	564,000	535,000	(513k)
• Intestacy	17%	13%	
• Ch Wills	23,000	29,000	31,000?
• Legacies	65,913	84,753	86,000?
• <i>Pecuniary</i>	34,780	42,515	
• <i>Residue</i>	31,133	42,238	



Republic of Ireland statistics

- | | 2002 | 2006 |
|---|-----------|--------|
| • Population | 3,900,000 | |
| • 4,240,000 | | |
| • Population 65+ | 430,000 | |
| • 467,926 | | |
| • Deaths: | 29,348 | 27,479 |
| • Legacies worth €12,000,000
(PCI research – top 20 charities) | | |
| • Irish legacy income should be €39 million | | |

Irish Demographics



Demographics

- Number of older people (65+) will double in 20 years
- Number of 85+ year olds will triple
- Number of 100+ will increase by 15 times
- Longevity threatens future wealth
- Security of families threaten legacies
- But deaths will go up by 25%!!!



Attitude to life

- 70% happy aged 65-69
- 70% not happy aged 75+
- Their spend on luxuries ↓ by 70% in those ten years
- They are worried about having enough to last their lifetime and for their grandchildren



When will you die?

- On average:
- Without a Will
- At 69
- With a Will
- At 79
- With a Will with a legacy to charity
- At 82



When will you die?

4.1 years after your last Will

This is dangerous figure!

In reality Wills are either 10+ years old or under 2 years old at death.

With these statistics it is almost impossible to plan ahead.



Legacy focus group agenda

- Establish rules (*confidentiality, tape etc*) and state objectives
- General charitable giving and knowledge
- Will making patterns and motivations
- Different causes and legacy values, entry times
- **Influences (*family, taxation etc*)**
- **Legacy giving and preferred method of asking for legacies**
- **Language to be used**
- Recognition
- Views on host charity and its priority as a cause
- Thanks
- Future communication/action



How do people want to be asked?

- Direct mail
- Telephone
- Website
- Newsletter
- Advertisement
- Brochure
- Event (legacy or general?)
- One to one?



The answers

- Direct mail – 68% say yes but why?
- Telephone – 5% only for a follow up
- Website – 15% extra information
- Newsletter – 100% but does it work
- Advertisement - 5% possibly
- Brochure 5% possibly
- Event - 95% but what type?
- One to one? – 1%..... usually



Research results in general

- Nobody wants to be asked for a legacy –
They only want to be made aware
- They want stories told by someone credible. They don't want a “sell”
- They want success stories – they hate failure
- Only few want any form of recognition



Research results in general

- They want a vision – it proves the need but might not convert them
- They want to know cost efficiency – they can't complain when dead
- They like events – they don't like individual pressure
- They need an up to date Will – they are selfish



Legacy case for support

- Your legacy vision must have:
 - Past successes
 - Key past events
 - Future need
 - Cost effectiveness – admin and ROI
 - Use of past legacies



Selfless v selfish

- Your vision is inspirational vision on the difference a legacy can make
- That does not make them take action
- Stories about making/updating their will to protect family and friends is selfish and
- That DOES make them take action.
- Combine both on all occasions



Key stories

- Past successes
- Identify every past achievement – date of foundation, new service or building
- Give examples of past legacies – but small and big at the same time
- Express admin costs and ROI on fundraising
- Tell funny stories
- Define the future need



Language and key phrases

- Which do you prefer?
- Bequest in your Will
- Legacy in your Will
- Gift in your Will
- Remember us in your Will



Language and key phrases

- Which do you prefer?
- After you have provided for your own family and friends perhaps you would be kind enough to include a second family – those helped by our charity
- If or when the time is right for you to include a charity in your will please remember ours



Language and key phrases

- Which do you prefer?
- “if there is something you treasure which you want to pass onto someone special, the best way of ensuring this happens is by including your wishes in your Will”
- It is so easy not to up date your will – but it is such an important document which guarantees your wishes are fulfilled



More phrases

- €50 or €50 million. A gift in your Will of any size will help the future of our charity (even if we prefer big ones!)
- Every gift in every Will makes a difference
- Live three years longer – leave us a legacy
- Die now – pay later; leave us a legacy!
Only joking!



Key issues

- Setting objectives for each method of communication: is it just to take action? (ie give wording for Will)
- Setting objectives for each target audience
(committed donors do not need stories – just action they need to take. Volunteers might just promote legacies; lapsed donors are cash poor so legacy costs nothing now)
- Matching stories to needs and motivations



Newsletter legacy page

- Article by lawyer on Will making etc
- Article by fundraiser on past legacies
- Vision by CEO or board member
- Outcomes of services by user or family member
- “Good use of funds” by Board member or Finance director



Legacy brochure

- Legacy vision by CEO or “charity expert”
- Story by user/client on great outcomes
- Wording for Will
- Glossary of terms
- Importance of Will and tax saving by attorney or lawyer
- Response mechanism



Annual review ☺

- Thank you
- Past year's success
- Current prudence – use of money
- Future ambitions
- Ways to make dream come true
- Response mechanism

Key issues

- **Direct Mail:**
 - *to whom and why?*
- Is it an appeal?
- Length – is it an issue?
- Who signs?
- Integrate or separate?
- Enclosures: what are they?
- Response mechanism?

Response mechanisms

- I have already done it
- I intend to do it
- Please call me I want to discuss this further
- Never contact me again about legacies



Event

- Is it a legacy event? Probably no
- Is it an AGM? An informal one...
- Is it an open day? If you have a good site
- Is it just a thank you? YES!
- Who should be invited?
- What is the call to action?
- What is the follow up?

Advertising

- Local can be good – get it free
- Legal stuff – is it worth it?
- Radio and TV – only for a national campaign such as mylegacy.ie



Effective legacy communications

Good communications rely on the best

Person

Medium

Story

Images

Ease to read, see or listen



Person continued

- Celebrity
- Patron
- Board member
- Staff member
- Fundraiser
- Volunteer
- Lawyer/will writer
- Financial adviser
- Legacy pledger
- Personal experience of the charity
- User/beneficiary
- Relative of above
- Next of kin of legator
- Person fulfilling objectives



Person

The results roughly

- Fundraiser - good
- Lawyer/will writer – good
- Financial adviser
- Patron
- Board member
- Staff member
- Volunteer - dangerous
- Celebrity - worst!
- Person fulfilling objectives - best
- Personal experience of the charity
- Next of kin of legator
- User/beneficiary
- Relative of above
- Legacy pledger - worst



Ease to see read and listen

- At 80 yrs we receive 80% less light into our eyes than a 20 yr old
- No background colours. Preference for reds oranges and yellows
- NO reversed out print.
- Indent paragraphs, use narrow columns
- Large typeface – sans serif
- Deeper voices when speaking.



Images

- Staff in teams
- Beneficiaries one at a time
- Captions must explain person

Importance of the spoken word

- According to research at Cambridge University, it doesn't matter in what order the letters in a word are, the only important thing is that the first and last letter be at the right place. The rest can be a total mess and you can still read it without problem. This is because the human mind does not read every letter by itself, but the word as a whole. Amazing huh?



16,000

- The average number of words we each speak each day.

How many are remembered by your donors?



Make them happy

- Give them joy – the emotions
- Give them satisfaction – your successes (outcomes) and prudence
- *Happiness is like peeing in your pants. Everyone can see it but only you can feel the warmth.*



Best Strategy – make donors happy

- The secret of happiness is to make others believe they are the cause of it.

Al Batt

- *Happiness is that state of consciousness which proceeds from the achievement of one's values.*

Ayn Rand



Help

- Some people bring happiness wherever they go.

- Others whenever they go

Oscar Wilde

- Bye

Richard Radcliffe





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