



Legacy Inspire | September 2020

The Legacy Inspire summary report



LegacyForesight



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Creating emotive and inspiring supporter journeys has long been considered an essential part of effective legacy fundraising. With a range of channels and a multitude of organisational content it can be difficult to know exactly what your supporter journey should look like and what it should be achieving. The Legacy Journey platform was created by Legacy Foresight to offer charities of all sizes the insights to improve their own legacy supporter marketing; from a strategic overview of journey composition to a more tactical view of optimising their individual communications. All good legacy journeys need a first step, the legacy brochure...

In most organisations, the legacy brochure is a crucial piece of communication for two key audiences:

1. The proactive legacy enquirer: someone who has already likely decided to make a legacy gift to a charity, may have already instigated the process of will writing, and is finalising their choices
2. The reactive legacy enquirer: someone who may have expressed an interest in legacy giving at some time in the future, potentially as the result of legacy promotion by the charity

For both audiences, therefore, a legacy brochure needs to inspire its readers as to the benefits of including a gift in their will to the charity and convey key information as to how to do it.

Legacy Inspire

In early 2020, Legacy Foresight partnered with Legacy Voice to mystery shop the top 50 legacy charities, to see how well they performed when responding to an initial enquiry for more information on leaving a gift in a Will. We evaluated not only the quality of communications received, but the timing and accuracy. We wanted to get a sense of the initial supporter experience that many potential legacy donors are receiving, and how different charities compare to each other.

Legacy Voice's Head of Consultancy Dr Claire Routley has devised a unique, research-based methodology based on what we know about great legacy communications. Each pack is uploaded to our secure Legacy Journey platform, where they can be viewed individually in detail or compared with peer charities, whether by cause, size or scores.

Legacy Journey
Simon Newbrenner Legacy Foresight

The Consortium
Tracker

Tracker Home

Overall Top 10		Integrity		Impression	
A charity name here	79	A charity name here	79	A charity name here	79
B charity name here	78	B charity name here	78	B charity name here	78
C charity name here	78	C charity name here	78	C charity name here	78
D charity name here	77	D charity name here	77	D charity name here	77
E charity name here	72	E charity name here	72	E charity name here	72
F charity name here	70	F charity name here	70	F charity name here	70
G charity name here	69	G charity name here	69	G charity name here	69
H charity name here	68	H charity name here	68	H charity name here	68
I charity name here	65	I charity name here	65	I charity name here	65
J charity name here	64	J charity name here	64	J charity name here	64

Information		Inspiration		Implementation	
A charity name here	79	A charity name here	79	A charity name here	79
B charity name here	78	B charity name here	78	B charity name here	78
C charity name here	78	C charity name here	78	C charity name here	78
D charity name here	77	D charity name here	77	D charity name here	77
E charity name here	72	E charity name here	72	E charity name here	72
F charity name here	70	F charity name here	70	F charity name here	70
G charity name here	69	G charity name here	69	G charity name here	69
H charity name here	68	H charity name here	68	H charity name here	68
I charity name here	65	I charity name here	65	I charity name here	65
J charity name here	64	J charity name here	64	J charity name here	64

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Legacy Journey
Simon Newbrenner Legacy Foresight

The Consortium
Tracker

RSPB
11 May 2019

Communication score 74

Information	19
Integrity	16
Inspiration	14
Impression	15
Implementation	10

Pack contents

- Envelope
- Covering letter
- Main brochure
- Case study leaflet
- Return envelope



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Legacy Inspire aims to shine a spotlight on examples of great legacy communications and to give charities the evidence and insights to improve their initial communication with legacy donors. We hope that Legacy Inspire will create a positive and constructive conversation about what makes an effective piece of legacy communication and give fundraisers the tools to engage and inspire more of their supporters to act.

Our scoring methodology

Given the important role of the legacy brochure, we set out to consider a) what makes a brochure effective and b) to assess the effectiveness of the brochures produced by the UK's top legacy earning charities. In early 2020,¹ therefore, we ordered brochures from the top charities, and developed a set of evaluation criteria to assess them.

¹ Pre- the coronavirus lockdown

The evaluation criteria were based on three key elements:

3. Did the pack get the basics right (e.g. were names spelt correctly, was it accessible) and did it convey important information about legacy giving?
4. Did the pack capture and hold attention and remain in one's memory, based on what research can tell us about consumer attention?
5. Did the pack reflect legacy giving motives, as well as including other factors which research tells us can influence the legacy giving decision?

These three elements translated in our 5Is:

- Implementation: Getting the basics right
- Impact: Quality and originality of design and visual imagery
- Inspiration: Reflecting legacy motives and encouraging donors to make a gift
- Integrity: Demonstrating that the organisation is a trustworthy steward of legacy gifts

Information: Providing clear and relevant information about how to leave a gift

We know that no evaluation tool or process is perfect, but we aimed to make our process as robust as possible, by grounding our evaluative criteria in what academic and market research can tell us about how people perceive the communications that they receive generally, and research into legacy giving specifically.

Implementation

Our first factor – implementation – related to getting the basics right. We considered issues such as how easy it was to find legacy pages on a website, how long it took for materials to arrive, and how accessible they were to the reader.

Impact

Impact relates to design and originality of the brochure. The impact that the brochure makes is important, because it plays a key role in encouraging the reader to pay attention – and, if the reader is not really paying attention, then they're a) unlikely to be inspired by the information the brochure contains, and b) remember it into the longer term.

Inspiration

Once a communication has captured a donor's attention, its next role is to inspire them to give. We also know that legacy supporters are likely to be motivated by the opportunity to continue their influence on the world beyond their own deaths, or achieving a form of symbolic immortality (Pyszczynski, et al., 2000).

Integrity

Under this heading, we examined a range of factors linked to trust such as demonstrating the impact on beneficiaries, and communicating evidence of good decision making (Sargeant, 2008), as well as considering whether the donor was thanked and if/how the charity communicated its values (Sargeant & Shang, 2008).

Information

Our final set of criteria were around information sharing. If a donor had made the decision to give, did the brochures communicate the information they needed to make their will, and include a gift? And did they make it easy to communicate that decision to the charity?

10 top tips

Below, we distil our findings into ten top tips for anyone considering developing or reviewing their legacy brochure:

1. Get the basics right

Ensure that brochures are sent promptly when requested, and contact details are correct, to avoid triggering doubts about your competency as an organisation.

2. Get the envelope opened

Consider how your outer envelope might encourage people to read on. This could be as simple as a handwritten address and a stamp or could involve designing the envelope to include an intriguing message or image.

3. Capture attention

You might have a compelling case for **leaving a gift to your organisation, but if it's not conveyed in a way that's likely to capture and hold your reader's attention then it may not get read**, particularly if someone is considering messages from a number of organisations. Use compelling images, bright colours and originality to pull in your reader.

4. Link to **supporters' motives**

Over the last decade research has been able to tell us a lot about the motives of legacy supporters. Consider how your brochure **can connect to supporters' autobiography and/or help them to see how their impact will continue beyond their lives.**

5. Use legacy language

When someone leaves a gift they are buying into the long-term vision and mission of the organisation, and embracing the **'why' rather than just the 'how'**. Legacy brochures should communicate those longer term aims alongside what the charity might be doing today.

6. Avoid legal language

An easy, research-informed change for many organisations to make would be to remove legal language and replace it with everyday terms, staying in the social rather than the market realm.

7. **Tell legacy supporters' stories**

Evidence suggests that talking about what other people are planning is effective in legacy fundraising. Integrating supporter stories throughout the brochure can help to normalise legacy giving and leverage the power of social influence. For some organisations, it can also emphasise impact on beneficiaries where beneficiaries and donors are likely to be one and the same.

8. Make it easy for people to tell you about their decision

Given the importance of stewarding supporters effectively, organisations should make it as easy as possible for supporters to tell them about their decision.

9. Generate trust

Supporters must be confident that your organisation will be around to receive their legacy and will spend their gift effectively. Research shows that you can generate trust by showing the impact on beneficiaries, demonstrating that your organisation makes decisions well and sharing the ethos behind its work.

10. Say thank you

Given that supporters are considering what is likely to be their biggest ever gift to charity – and legacy supporters are more demanding than general supporters – ensuring they are thanked is key. Thank you messages can be integrated throughout the brochure but also through the covering letter.

Subscription options and costs

Subscribers access Legacy Inspire via secure login on the Legacy Foresight client area.

- £3,000 provides 12 months full access to the Legacy Inspire platform where the full scoring for each piece of communication can be viewed in detail, plus the full report giving detailed examples of best practice for each of the 5 I's
- £500 provides 1 **month's** access to the full archive of creative legacy materials for the top 50 legacy charities (excluding access to the scoring)
- £1,500 provides a review and recommendations on individual charity communications plus the full report giving detailed examples of best practice for each of the 5 I's (standalone service separate to Inspire platform access)

To find out more please contact Richard Hill; r.hill@legacyforesight.co.uk