Legacy Fundraising – Trends and Tips for Success

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About Smee & Ford

Established over 100 years ago

We read through over 5,000 wills each week!

We identify and report on all charitable content
Legacies to small charities

- 13,500 bequests
- Average cash gift is £4,200
- Many small charities rely on legacies to support their work and ensure their longevity
“Legacies are our lifeline”

“Legacies helped fund the property for the charity so they can continue to provide support for those in need

“We don’t receive any statutory funding, so we’re totally reliant on legacies and voluntary donations. We received a substantial legacy donation in 2009 that helped the charity to purchase and adapt its own premises. Up until then, we’d been in rented property for 30 years. We now have a permanent base where visually impaired local people can come to receive help.”

*Norman Stenson, Partially Sighted Society*
“Without the Wills we simply wouldn’t survive now as a small charity”

“Our donations are really affected by worldwide disasters such as the tsunami... This is why we rely so heavily on legacies to support our ongoing work as they give us longer term security for our future.”

Melanie Dunn, Animals in Distress
5 year trends in legacy giving to small charities*

*Data from Charity Financials/Charity Commission
Who are your Supporters?

This varies according to your:

- cause
- location
- size
General Small Charity Supporter

Age at Will: 77
Gender: Female
Type of bequest: Absolute Pecuniary
Average gift: £4.2k / 24% of the residue
UK region: South West England
## Average Absolute Cash Gift by Cause

<table>
<thead>
<tr>
<th>Causal Area</th>
<th>Avg. Value</th>
<th>Causal Area</th>
<th>Avg. Value</th>
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</thead>
<tbody>
<tr>
<td>Aged</td>
<td>£3,114</td>
<td>Hospices &amp; Hospitals</td>
<td>£3,817</td>
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<tr>
<td>Animals</td>
<td>£3,331</td>
<td>Human Rights</td>
<td>£3,845</td>
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<tr>
<td>Armed &amp; Ex-Services</td>
<td>£2,784</td>
<td>Medical Research</td>
<td>£3,899</td>
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<tr>
<td>Cancer Research</td>
<td>£2,613</td>
<td>Medical Welfare</td>
<td>£3,946</td>
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<tr>
<td>Children &amp; Youth</td>
<td>£6,930</td>
<td>Mental Health</td>
<td>£2,928</td>
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<tr>
<td>Culture &amp; Heritage</td>
<td>£5,291</td>
<td>Other</td>
<td>£3,321</td>
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<tr>
<td>Disabled</td>
<td>£2,910</td>
<td>Overseas Aid</td>
<td>£4,786</td>
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<tr>
<td>Education</td>
<td>£11,561*</td>
<td>Places of Worship</td>
<td>£3,167</td>
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<tr>
<td>Environment</td>
<td>£3,272</td>
<td>Religious</td>
<td>£4,206</td>
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<tr>
<td>Family</td>
<td>£2,862</td>
<td>Rescue Services</td>
<td>£2,279</td>
</tr>
</tbody>
</table>

*figure distorted by one cash gift of £2.4m. Without this it is £5,256
5 top tips to creating your legacy marketing campaign

1. Identify legacy trends in your causal area
2. Pinpoint the geographical areas where people have left gifts in wills to charities like yours
3. Understand the profile of people who have left legacies to charities like yours

This should give you the information you need to create a targeted marketing campaign.
5 top tips to creating your legacy marketing campaign

Now you can use your own donor lists to:

4. Find the individuals that match the profile and areas identified

5. Target them with a carefully worded legacy appeal or invite them to a legacy event

GOOD LUCK!
www.smeeandford.co.uk/legacyview

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Charity Twinning
Charity Twinning: The Concept

- Pilot scheme launched in June 2013
- Aim: to give small charities the opportunity to learn from larger charities…
- …and large charities the chance to get back to basics and work at a grassroots level again
- Six charities were paired for the initial scheme
- Their experiences were outlined in The Fundraiser magazine, so that charities of all sizes could share in the learning
What do we do?

• We are the leading support and research charity for people with dementia, their families and carers

• We campaign & lobby for a better quality of life for people with dementia & a greater understanding of the condition

• Dementia is not a natural part of aging, it is a disease of the brain that robs people of their life

alzheimers.org.uk
How we raise funds

- 39%: £27.5m Contracts
- 35%: £25m Donations
- 18%: £13.3m Legacies
- 7%: £4.6m Trading and other
- 1%: £0.7m Investment

- Total income of £71million
Hope for Children (HOPE) exists to help orphaned, poor, exploited and other marginalised children in developing countries and in the UK.

We actively identify disadvantaged children and communities by working with local partners. Through empowering, collaborating and learning together we aim to build a sustainable future for the children and communities we serve.

Our focus is to reach as many children as we can and deliver to them the childhood every child deserves. We strive to work towards a world where children’s rights are realised and they can reach their full potential.

www.hope-for-children.org
How HOPE raise funds

2012/13 Income = £1.6 Million

- Institutional Grants
- Challenge Events
- Student Fundraising
- Community Fundraising

I support Hope for Children because I know that the money I donate is helping children in both the Philippines and Uganda receive an education through their Walk to School Programme. They are honest, open and transparent about

Chris Hughes,
Founder, Brand Events Ltd
Why did we get involved?
How did it work?
What has been put into practice?
What were the results?
What did we learn?
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