

Conservation work on
Three-A-Penny, an artwork by
Edward Worrall (1829-1913).
© Pete Carr

The Art of Legacies

Developing long-term income for arts,
culture, and heritage organisations
through gifts in Wills

REMEMBER A CHARITY
IN YOUR WILL
Help the work live on...



Chartered
Institute of
Fundraising

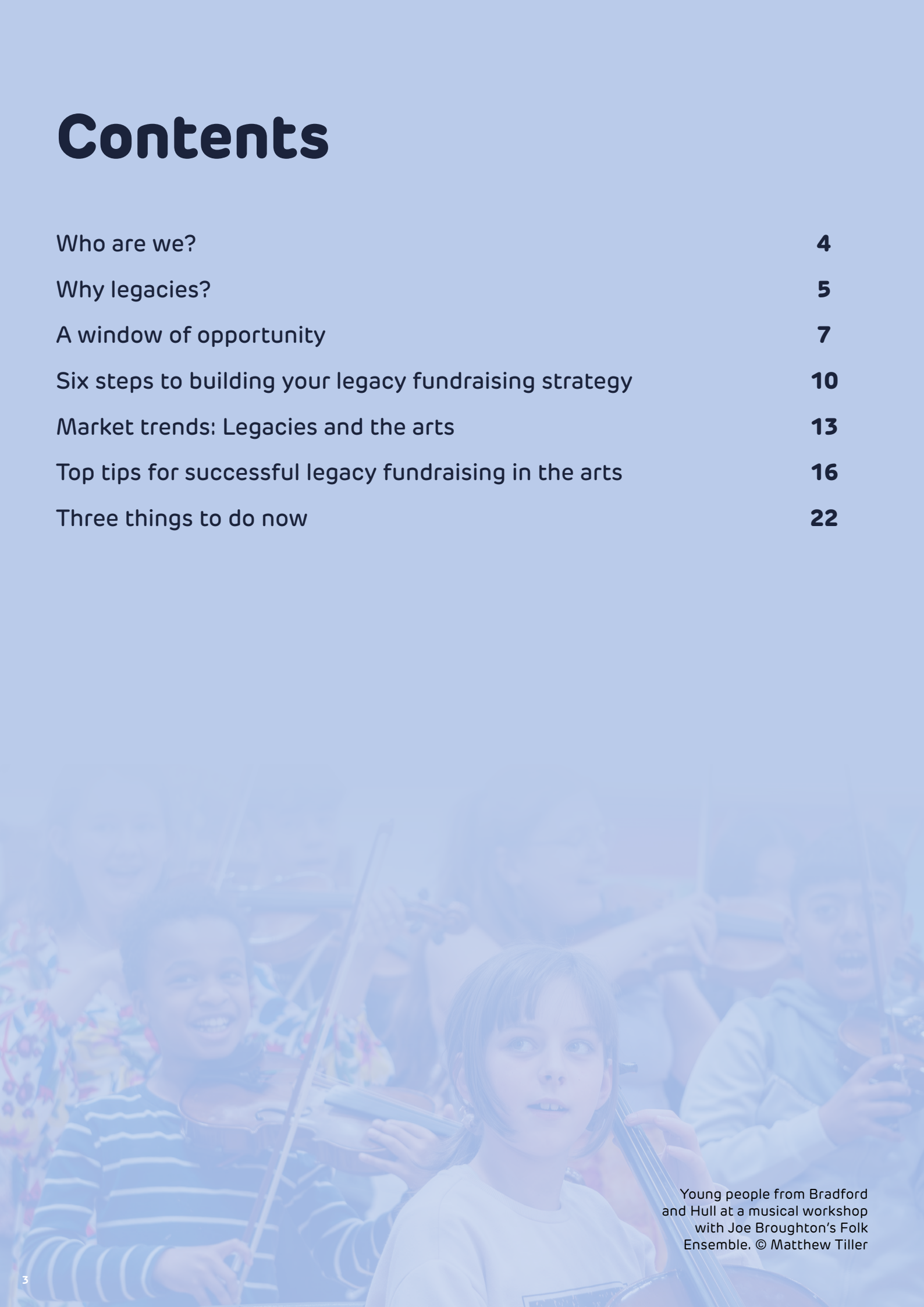
**This report has been produced by
Remember A Charity, funded through
the Chartered Institute of Fundraising's
RAISE programme.**

**In this report, we look at the impact
charitable gifts in Wills are having in
the arts, culture and heritage sector for
organisations at different stages of their
legacy fundraising journey.**

**We learn how fundraising and
development professionals at arts
centres, galleries, museums, dance and
music charities are approaching legacy
fundraising, sharing advice and insights
about how your organisation can grow
through gifts in Wills.**

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A group of young people, mostly of African and Asian descent, are shown from the chest up, playing violins and a cello. They are in a workshop setting, smiling and looking towards the camera. The image is overlaid with a light blue semi-transparent filter.

Young people from Bradford and Hull at a musical workshop with Joe Broughton's Folk Ensemble. © Matthew Tiller

Who are we?

**REMEMBER A CHARITY
IN YOUR WILL**
Help the work live on...

Remember A Charity is a consortium of almost 200 charities working to grow the UK legacy giving market and to support charities with their legacy fundraising. The annual Remember A Charity Week is held in September, serving as a platform for member charities to champion gifts in Wills. The consortium also runs high profile consumer campaigns all year round, while working with legal partners and Government to nurture the wider legacy environment. Remember A Charity is part of the Chartered Institute of Fundraising.



The Chartered Institute of Fundraising is the professional membership body for fundraising, supporting fundraisers at all stages of their career. Within a broad range of services, the Chartered Institute offers legacy training and hosts a Special Interest Group on Legacy and In memory fundraising.

See more at:
rememberacharity.org.uk
ciof.org.uk

Why legacies?

Funding the arts for future generations

With the potential to generate long-term and sustainable income streams for future generations, charitable legacies are unique. While each legacy can vary widely and the timing of those gifts is often unpredictable, this form of giving can deliver a vital source of often unrestricted income, giving you the flexibility to direct funds wherever the need is greatest.

Alongside the most typical and popular monetary gifts, legacies can open the door for passionate art lovers to leave generous residuary gifts, artwork, property or even their entire estate to the organisations that meant so much to them in life. In this regard, even a single legacy can be transformative.

It takes time to build a flow of legacy income, but an established legacy fundraising programme can secure a charity's future, building a resilient foundation on which to plan and build. This has become even more essential in recent years of uncertainty, with arts organisations facing cuts in funding, the pandemic limiting a wide range of income generation activity, and the rising cost of living making fundraising all the more challenging.

Growing appetite for legacy giving

Across the UK, there has been a welcome shift in attitudes towards leaving a charitable legacy. Remember A Charity's long-term benchmarking study finds that one in five (21%) UK charity supporters aged 40+ say they have left a gift in their Will, up from 15% in 2018¹.



Lucinda Frostick, Director of Remember A Charity, says: **"It's not that long ago that legacy giving was viewed largely as the preserve of the wealthy. Now, thanks to the sector's willingness to collaborate**

to build understanding about giving from your Will and to support from the legal sector, legacies are not only more widely understood, but they are becoming more commonplace. And these gifts are transforming the world around us, sustaining vital projects and programmes, and protecting places, properties and collections long into the future."

For those who have treasured connections with the arts, whether that's tranquil locations, places of heritage, invigorating performances, astounding artworks through to community-based arts activities and more, a gift in a Will can ensure these valued places and services will be there for future generations.

And the good news is that people across the UK are increasingly choosing to remember arts, culture and heritage organisations in their Will. In fact, legacy income for the arts is outpacing many other charitable causes (see: **Market trends: Legacy fundraising and the arts**).

Dance Professionals Fund – Resilience now & into the future

With a history starting more than 80 years ago, Dance Professionals Fund provides confidential advice, financial support and essential services. A key part of the organisation's fundraising strategy, legacies are enabling it to support dance professionals now, and will be essential for enabling the charity to continue its work far into the future.



Clemmie Cowl, Executive Director, says:

"For us, it is important that our charity is there for many years to come, and legacies can be a really good way to ensure that this happens. Over the

years we have benefitted from many kind individuals believing in us and wanting us to be able to offer support to dance professionals in the future. Without this help, we would be able to do far less than is the case now.

"Many of our legacies have come from those who have loved watching dance. We help members of the dance profession who have fallen into financial or other difficulties and our legators see not only the merit of supporting this valuable work, but that doing so is also a way to ensure that performances too will be able to continue in future years."



Dancer in rehearsal.
Dance Professionals Fund

A window of opportunity

Many arts, culture and heritage organisations – large and small – have already built up a steady and substantial flow of income from gifts in Wills. But for those still to take the first step, or just at the beginning of their legacy journey, this is an exciting time to start or develop your legacy fundraising.

We are now approaching a generational shift towards the Baby Boomer cohort, opening a crucial window of opportunity for legacy growth. Over the next three decades, £5.5 trillion² is expected to be passed down from Baby Boomers to the

next generation, and it's a cohort of strong charity and community-minded supporters who want to see the world become a better place. Many have a deep-rooted passion for the arts, for heritage and culture, and hope to safeguard the creativity, historic and cultural places and treasures, together with the arts profession and other forms of creativity for generations to come. So, the sooner organisations are able to share the legacy message with supporters, visitors and service users alike, the greater the benefit is likely to be.



Young Sounds UK

– Caring for pledgers & their families

For over 25 years, Young Sounds UK has supported talented young people from low-income families to fulfil their musical potential. Legacies have played an integral role in the charity since its founding – which came as the result of a bequest from violin collector Robert Lewin. His gift alone has since supported 5,000 young musicians.

More recently, a legacy gift enabled the charity to set up The Monica and Quintin Des Clayes Awards while an in-memoriam gift is behind The Lucy Gostwick Award. The Des Clayes gift resulted from a family seeking to honour their parents' wishes after they had stated in their Will that they wanted to give to a music education charity.

For Young Sounds it was really important to consider the family members too in how it used the gift.



Sanpreet Janjua, the charity's Development Manager, explains:

"The Des Clayes legacy was really crucial for us in allowing us to keep going with our work and securing our future. To honour that gift, we created the honorary Named Awards because, while it was unrestricted, we wanted to thank the family members and keep them involved. Having a set of Award winners every year means they can really feel and understand the difference their parents have made."



Young people from Bradford and Hull at a musical workshop with Joe Broughton's Folk Ensemble. © Matthew Tiller

Similarly, The Lucy Gostwick Award was established by Giles Gostwick in memory of his daughter and he has also left the charity some money in his Will, so it can continue after he passes away as well.

Sanpreet comments: **"There is something really poignant around the fact that even after you're gone, this Award will still continue. It's about keeping people's memories alive. Arts charities are in a unique position of being able to celebrate and memorialise what people take joy in during their lifetime"**

To help share the legacy message further, as well as ensure supporters and pledgers feel valued, in 2023 Young Sounds held its first legacy event – a concert afternoon for high level supporters to hear

music, listen to questions and answers about legacy giving between a pledger and the charity's Chair, and to enjoy afternoon tea. At the event, Young Sounds launched The Robert Lewin Circle for pledgers, which has become another important way for the charity to steward these supporters.

When it comes to sharing advice for fellow arts fundraisers, Sanpreet adds: **"One of the best things you can do is to really take the time to understand from your current supporters or audience members why it is that they like coming to you. Why are they repeat visitors; why do they top up their box office donation; why is it that they're giving to you? You can learn so much from this that you can use to talk to them about legacy giving."**

"Arts charities are in a unique position of being able to celebrate and memorialise what people take joy in during their lifetime."

Sanpreet Janjua,
Young Sounds UK
Development Manager



A young person in a mentoring project with the BBC Symphony Orchestra,
© Edward Webb

Six steps to building your legacy fundraising strategy

1

Get to know your prospects: Research your prospective legacy audiences to help you connect with them – remember legators might be not only your existing supporters, but regular visitors, beneficiaries and others. Aim to identify those with long-term commitment or active engagement, and to understand what their connection is to the cause. Consider the touchpoints you have with potential legacy supporters. Could you add a question on your supporter or visitor surveys and other communications, asking people to indicate if they would like to find out more about leaving a gift in their Will or to tell you if they already have?

2

Define your legacy proposition: Build on what you know about your supporters and their values to develop a legacy proposition that conveys a compelling narrative and a clear call to action. This might be to inspire supporters to ensure the artwork or spaces they love are there for generations to come or to empower audiences to drive change beyond their lifetime. A quick web search can be a great way to explore other charities' legacy messaging for inspiration. As your proposition will be at the heart of your legacy messaging, it's important to test how it resonates with your audiences and whether it inspires them to remember your organisation in their Will. Remember to share it internally and ensure you have the buy-in of your leadership too.

3

Engage and inspire your audience: Plan how and where you can engage your legacy prospects. While this can include anything from social posts and emails through to direct mail campaigns, make sure you communicate personally and individually where possible, whether that's through letters, calls, or events. Aim to build genuine relationships, establishing trust and sharing inspiring stories of legacy gifts and what they can achieve. Develop a bank of case studies that you can use to help convey that legacy giving is a social norm.

4

Make it easy: Legacy giving might sound daunting to some, so talk about 'giving from your Will' and break down the steps involved, making it as easy as possible for them to take action. Remind supporters that their gift will be valued, no matter what size, and that donations can fit around their wishes for their loved ones. Consider offering tips or a short guide on your website about how to write a charity into their Will, helping them understand the options for legacy giving, whether that's leaving an amount of money, a specific item or a percentage of their estate. It's important to consult a legal professional to ensure that the information is correct and to avoid giving legal advice to supporters yourself. Many charities will offer referrals to a local solicitor or Will-writing provider who can give supporters the advice they need. Be approachable and encourage supporters to ask questions where they need to, giving you opportunities to foster relationships.

5

Nurture your supporters: Whether you know someone has pledged a legacy or simply that they are intending to do so, make them feel special, thanking them and the families of legators who have passed on. As well as regular communications, events – from exclusive performances and exhibition viewings to tours and afternoon teas – are a great way to ensure they continue to feel engaged, inspired, and valued. Use them to keep people up to date with what you're doing, introduce them to different aspects of your work – and of course continue to talk about the impact of legacy gifts. You might even want to introduce a Legacy Circle or recognition programme.

6

Give it time: Legacy fundraising isn't a short-term option. You'll need to be patient – but it's likely to be well worth the wait. The return on investment for legacy fundraising can be hard to beat. And, while it'll take time for the income to come through, you can track engagement and response rates to campaigns, alongside any likely gifts from those who say they have pledged or intend to leave a gift. Don't forget that – in many cases – a legacy gift is a surprise to the charity and the first you hear about it is after the supporter has passed away.



"Stewardship of our legacy pledgers is vital to us, as we want to show our thanks to them for their future generosity and keep them close to us. We have a Henry Cole Circle, named after the first director of

the museum, and members are invited to special events including curator-led talks, private views and an annual lecture hosted by the Director.

I also speak on the telephone and make home visits to those unable to come into the museum. Getting to know our legacy pledgers is certainly one of the most enjoyable aspects of my job. We've also seen lifetime giving from legacy pledgers grow significantly since this was established."

Emma McCormack, Head of Legacy Giving, V&A.



Young V&A, Feature Stair, Town Square. © David Parry, courtesy of Victoria and Albert Museum, London

Market trends:

Legacies and the arts

Legacy gifts to arts, culture and heritage organisations are already growing fast. Market data from Legacy Foresight shows 34 arts, culture and heritage charities in its top 1,000 charities for legacy income in the year 2022/23. During this period, these charities received £30 million in legacy income and, over the past decade, this has grown by an average of 10% per annum. Although there are peaks and troughs in legacies with some years bringing unusually large gifts, it's worth noting that average growth for legacy income in the arts is almost twice as much as the 5% annual growth seen by the top 1,000 overall.

And while the likes of the National Art Collections Fund and English Heritage featured in the top legacy charities, so too do smaller organisations, including the North York Moors Historical Railway Trust and the Royal Artillery Museum. The future for legacies in the arts, culture and heritage sector looks positive indeed.



Kathryn Horsley, Senior Consultant at Legacy Foresight, says:

"The fast growth of the arts, culture & heritage sector over the past 10 years reflects a trend we have seen across the whole sector – a shift from people leaving gifts to the largest well-established charities towards smaller, niche and often local charities. We would expect this trend to continue in the future, as the boomer generation seek out charities that they have a personal and emotional connection with, and this is something charities in the arts sector can take advantage of."



National Museums Liverpool

– Rooted in legacies

Over the years, National Museums Liverpool, which comprises seven free museums and art galleries in and around the city, has benefitted greatly from gifts in Wills. In fact, the origins of its World Museum are rooted in the natural history collection bequeathed to Liverpool by the 13th Earl of Derby when he died in 1851. Similarly, its venue Sudley House and its former owner George Holt's collection of paintings were left to the city by his daughter Emma Holt in 1944 and are now part of National Museums Liverpool.

More recently, legacy gifts have supported key capital projects such as the refurbishment of galleries, and initiatives including its House of Memories dementia awareness programme.

They've also enabled National Museums Liverpool to add some important pieces to its collections – one legacy gift to the Walker Art Gallery enabled it to purchase *Three-A-Penny* – a painting by Liverpool Pre-Raphaelite artist Joseph Edward Worrall.



Emma Gilbertson, Individual Giving Manager, explains:

The Walker Art Gallery had been interested in acquiring the work for some time, and thanks to this generous bequest, the painting is now permanently in the Gallery's collection for all to enjoy."



Emma continues:

"Legacy gifts have had a huge impact on National Museums Liverpool as it stands today and can support all areas of our work, from helping to preserve some of our 4 million objects for future generations to enjoy, learn from, and be enriched by; to supporting research which shapes our understanding of the past and helping to fund educational visits to inspire curious minds."

As such, the charity is working to develop its legacy giving, increasing messaging to supporters and visitors, and utilising every opportunity to highlight legacies.

She adds:

"We want to raise awareness of the value of legacies internally and externally, and try to feed messaging throughout the year through a variety of methods such as including pieces in our newsletters to subscribers, social media activity, posters in our venues, and video content that we can share on social and our website."

"We know legacy fundraising is generally more of a longer-term investment, and we're making really positive steps to build this for the future."



Learning session inside the Ancient Egypt gallery at World Museum, Liverpool. © Pete Carr

Top tips for successful legacy fundraising in the arts

Whether you're yet to start your legacy journey or are looking for ways to build on what you're already doing, here are some tips to help.

Top tip #1

Drip feed the legacy message

People are often much more open to the idea of leaving a gift in their Will than you might think. But they need to know that it's needed, to understand just what a difference this might make to your organisation and to visualise what their legacy will enable you to do. So, weave the legacy message into your existing fundraising strategy and drip feed that messaging across your channels, making sure your supporters know they can fit any gifts around their wishes for their loved ones. Certainly, legacies need to be sensitively communicated, but the opportunity of legacy giving needs to have visibility and that means being prominent on your website and in relevant mailings, featured at events and shared on digital.



"Start where you can – something is better than nothing. If you currently have no messaging around legacy giving in place, can you perhaps create a webpage, a simple leaflet, or include a piece in

your newsletter that will help to get the message out to your supporters that this is another of the ways they might wish to support you?"

Emma Gilbertson, Individual Giving Manager,
National Museums Liverpool.

Top tip #2

Build support internally

Internal buy-in is a must for legacy success so, before you take your legacy message out to prospects, aim to recruit & engage internal champions, sharing legacy success along the way. Make sure all those who might interact with potential pledgers have the information they need to be a legacy advocate, from your CEO and Trustees through to volunteers and your fundraising peers. This will ensure that everyone from volunteers to senior management understands the value of legacies, as well as the importance of talking about them with prospects. Having that buy-in can also be crucial for securing investment at board level. But it's also important to manage expectation, making sure your board and leaders understand it will take time for legacy fundraising to bear fruit.



"Sharing the value of legacies with all staff, including volunteers, builds buy in and creates advocates that can help you spread the message more widely. Invite them to internal training on legacies, and seek other

opportunities to share their importance internally. During legacy promotion week at the Royal Opera House, we spoke to the ushers and front of house staff so that they knew and understood what legacies were and why they were important. We also shared (in posters in the lift) quotes from legacy pledgers about why they had left gifts. And, to make the value of legacy gifts salient and relevant, we turned the value of legacy income each year into how many ice cream sales that equated to, helping people understand the financial value of legacies to the charity."

Marina Jones, Deputy Development Director,
English National Opera and London Coliseum.

**Top tip
#3**

Celebrate the impact of legacies

Supporters of arts, culture and heritage organisations already love what you do, so stories demonstrating what legacy gifts have helped you achieve will really resonate with them. Make sure you share both the emotive aspect of legacy giving as well as the financial impact of those gifts as this will help them understand what leaving a gift in their Will might mean to them too. And, as set out in our top tips for building a legacy strategy, nurture your pledger relationships.



"When we have productions supported by legacies, we use them as a chance to talk about their power to bring joy to people."

We have dedicated performances to those who have left legacies where we talk about their love of that opera or composer, for example, a legacy from a donor who loved Mozart helped our revival of 'The Magic Flute'.

"In our backstage tours, we have included mentions of what legacies have achieved on stage and off, and we use our newsletter to legacy pledgers to share projects supported by pledges received so they can visualise the future impact of their gifts. We include pictures, and quotes from young people who have been to the opera for the first time or from apprentices who have learnt a trade for life because of these gifts."

Marina Jones, Deputy Development Director,
English National Opera and London Coliseum.



Ruairi Bowen, Ben McAteer,
ENO Chorus, ENO's Iolanthe 2023.
© Craig Fuller

**Top tip
#4**

Consider how you'd approach gifts of property or assets

Legacy gifts of property or assets can be immensely valuable but not every charity will be able to receive them or manage the sale of complex assets or unusual artefacts. Consider what approach you would take and whether it might be advisable to include a sentence or two on your website that encourages people who wish to gift bequests of property or assets to get in touch and discuss their wishes. This can help people plan their legacy in the best way and open up valuable dialogue with prospective pledgers. Don't forget to take a look at the Chartered Institute of Fundraising's guidance on legacies and on acceptance and refusal of donations, accessible at www.ciof.org.uk

Did you know...?

When Polish concert pianist and composer André Tchaikowsky died in 1982, he left a Will requesting that his organs be used for medical purposes, 'with the exception of my skull, which shall be offered by the institution receiving my body to the Royal Shakespeare Company for use in theatrical performance'. Tchaikowsky's skull finally appeared on stage in 2008 in a production of Hamlet, starring David Tennant.

**Top tip
#5**

Use Remember A Charity Week to get the conversation started

Collaborating with others, through initiatives like Remember A Charity, provides opportunities and resources for amplifying your own legacy messaging and reach. Use Remember A Charity Week to get the conversation started internally and externally; giving you a national platform to highlight the importance of legacies (or their potential) for your charity. Find out more at www.rememberacharity.org.uk



Recent campaign imagery and member resources from Remember A Charity Week, which takes place every September.

The Amber Trust

– First legacy steps

The Amber Trust provides musical opportunities for blind and partially sighted children, as well as those with more complex needs. At the start of their legacy fundraising journey, they recently received their first residual legacy gift.



CEO Angela Voyajolu explains their first steps into legacy fundraising:

"As a small charity new to legacy fundraising, getting started can feel overwhelming. Part of our plan for 2023 was to tackle this. Educating ourselves on legacy gifts and fundraising was a large part of the process."

The charity chose to kick off its legacy activity during Remember A Charity Week, creating an easily accessible legacy page on its site, and a

campaign that targeted Facebook (where its target demographic lies) and incorporated X/Twitter and Instagram. It also found a Will-writing provider to help incentivise supporters.

Angela continues:

"During the week, we scheduled a mix of posts, including the launch of our new Will-writing provider, facts about Wills and legacy gifts, and how donations help our beneficiaries. The content we created was designed to be 'evergreen' so that it can be used again in the future."

"We have only just begun our legacy fundraising journey but know that the time taken to educate ourselves has given us more confidence and a better understanding of how to shape future campaigns."



**WILL
YOU**

Change the lives of blind children through music?

A campaign visual from The Amber Trust's first legacy campaign for Remember A Charity Week, featuring one of Amber's young musicians

The Courtyard

– Raising awareness of legacy giving

Established in 1998, The Courtyard Centre for the Arts offers drama, music, dance, cinema and visual arts in Hereford, and works across the county and beyond through its outreach and engagement programme aimed at children and older people.

Pre-pandemic, The Courtyard had only ever received two gifts in Wills, including a substantial legacy gift from former local journalist and long-term supporter Laurie Teague, which played a key role in supporting a major building redevelopment project.

Since the pandemic, The Courtyard has pulled out all the stops to promote legacy giving both internally and externally, including joining Remember A Charity, promoting legacy giving to all staff, volunteers, and board members, and finding new ways to share the legacy message as widely as possible.

From having just a leaflet pre-pandemic, the organisation now shares the message through its regular emails; includes it in its Support Us leaflet that covers all forms of giving, and on a dedicated webpage; and promotes it to its friends and patrons' membership scheme through emails and a quarterly coffee morning, as well as through posters and bookmarks.



An always-on yet low-key approach is essential to raising awareness of the opportunity, says former Fundraising Manager Clare Wichbold, adding:

"We've slipped bookmarks into books on our stall at a market in Hereford, and when people make a purchase from our artisan craft and gift shop, they go in the bag as well."



Bookmarks asking people to consider leaving a gift in their Will to The Courtyard.
© Kie Cummings

"Since the pandemic, we've also introduced plasma screens in the cafe and on the first floor, showing what's on and other information, and we include remembering the organisation in your Will there. So if you sit there with your cappuccino for long enough, you're reminded about legacy giving at least three times."

Twice a year, Clare also writes to all the solicitors and undertakers in Herefordshire so they are aware of The Courtyard as a potential arts charity that people might like to give to. She says:

"The secret is to keep the information simple and succinct – don't oversell it, and have really good images that catch people's eye and draw them in. We've used photos from our youth theatre production of the Wizard of Oz, which was absolutely fantastic for imagery. We also had a production of Jane Eyre, where the little girl in it was just so brilliant that we used a photograph of her around legacy giving. For us, this approach really works."

Clare Wichbold has retired, and Melanie Denning is now The Courtyard Centre for the Arts' Head of Fundraising.



The Lion, the Witch and the Wardrobe at the Courtyard.
© Mark Douet

3 things to do now

Sign up to Remember A Charity's
free monthly Legacy Bulletin
for news and case studies of legacy
fundraising success



Find a legacy training course
to help you build your legacy
knowledge and expertise



Subscribe to newsletters
from the Chartered Institute of
Fundraising's Legacy and In
Memory Special Interest Group



Become a Remember A Charity member and grow your legacy
fundraising programme – Find out more

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www.ciof.org.uk



Supported using public funding by
**ARTS COUNCIL
ENGLAND**

This guide is kindly funded by Arts Council England, the national development agency for creativity and culture.

Main house stage at
The Courtyard. © Luke Evans



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