

10 top tips

For Internal Legacy Communications

**REMEMBER A CHARITY
IN YOUR WILL**

Introduction

Securing internal engagement is a crucial part of any charity’s legacy journey. Ensuring that legacies are a central part of your interaction with supporters, at all touchpoints, maximises the likelihood of a supporter choosing to give in this way - helping to further unlock the huge potential of this lifeline voluntary income stream.

Understanding of legacies, and buy-in from across all levels of your organisation, is undoubtedly crucial. This aim cannot be achieved by working in silos. Indeed anyone, from any team, can be a legacy champion, and play an active role in opening up the conversation – empowering supporters to leave a

legacy gift and ensure the vital work of your charity lives on for generations to come. In this guide you’ll find 10 tips to help you raise the profile of legacies internally and build engagement, as well as some real life examples from other member charities. We hope you find it useful.



Lucinda Frostick
Director, Remember A Charity

1. Bring legacy giving to life through storytelling

The stories behind supporters' gifts are unique and powerful, so be sure to share those stories internally and inspire others across the organisation with legacy giving. Perhaps you can convey why the supporter felt such a deep connection to your cause, why they chose to leave a gift, and what it can enable you to do.

There is so much power in storytelling. Sharing these stories across your internal channels at team meetings, board meetings, team events, on the intranet and staff newsletters will not only help build understanding of legacies, but also help create an emotional connection.

“ *If you have them, present real donor stories (especially living legators) and what giving through their Will means to them. In other words, make this about the donor, the cause and the gift's desired impact, and not the legacy team's objectives or Wills themselves.* **”**

Revitalise

Alex McDowell
Director of Fundraising, Revitalise

2. Embed legacies in your induction processes

There's a lot for people to get to grips with when they join an organisation, but having legacies embedded within the induction process ensures it has legitimacy and that it's seen as an important income stream from the very start.

Our 'Introduction to Legacies' webinar is free for all members to download and share internally [here.](#)

“ *Something we've introduced recently is an 'introduction to Legacies' video which is made available to all new starters as part of their induction.*

Battersea also hosts an organisational induction day each month for all new joiners across the org. There is a section called 'marketplace' where a rep from Legacy fundraising and Legacy Admin will go along and do a five-minute 'speed dating' style talk to small groups as they move around the room listening to different departments give a brief overview of their work. I find this to be one of the best ways to engage colleagues. **”**



Michelle Adelman
Legacy & In Memory Marketing Manager, Battersea



3. Equip everyone in the organisation to have a legacy conversation

A legacy conversation can be daunting for those who aren't used to it. Talk to staff, volunteers, and your Board about the importance of legacies, what might inspire someone to consider leaving a gift in their Will and give them some useful conversation starters to help them put it into practice.

Reassure them that this isn't a conversation about death, but a positive and empowering discussion; a chance to focus on how their legacy can live on. Perhaps you could run legacy conversation training sessions or prepare a short video to share your tips?

“ *On our residential away days we've held legacy workshops utilising Duplo to demonstrate that every member of the team has a brick to lay in building our 'legacy house'. We ask everyone to sign a pledge as to how they would include legacies in their work going forward.*

We also ran our own legacy roadshows which tour our regional offices to engage teams and deliver supporter facing conversation training. **”**



Kerry McMenamin
Legacy Fundraising Lead, Christian Aid



4. Host internal events about legacies

Having an open face-to-face chat can be one of the best ways to build understanding about legacies, so have a think about how you can create those moments for colleagues to come and talk to you about legacies.

These might be simple meetings and discussions over coffee and cake. But you could even offer a Will-writing event for staff or volunteers, where they have the option of making a gift themselves or speaking to a legal expert.

“ I think it’s so important to get yourself out and about in the organisation and make yourself available for team inductions. When running internal events, make sure you give a flavour of how important gifts in Wills are for your income and your impact, and highlight that these gifts are thanks to EVERYONE.

***My top tip is, after presenting, to ask everyone to share something they have learned or want to know more about, rather than simply asking if there are any more questions. I find the responses that come through really help build understanding further.*”**



Anaish Yilma-Parmar
Head of Legacies, British Red Cross



5. Make it fun

Quizzes and staff competitions provide a great opportunity to build understanding further and to bust common myths about giving in this way. What's more, it shows that a conversation about a legacy doesn't have to be heavy.

Why not check out our [Mentimeter templates](#) with quizzes on legacy market data or the unusual things that people have left behind in their Wills.

Other ideas might include running a 'Who wants to be a Willionnaire' quiz or holding a competition to see who can come up with the best legacy advert, script, or song using ChatGPT.

“We've invited colleagues from our entire fundraising and engagement division to come and join us for a 'doughnut break' in the kitchen, providing an ideal opportunity for them to come and have a light-hearted chat with the legacy team.”



Kerry McMenamin
Legacy Fundraising Lead, Christian Aid



6. Highlight the income potential to inspire your senior leaders and trustees

Legacy income has grown significantly over the past two decades and it's predicted that annual income through gifts in Wills will double by 2050. Highlight the potential for growth and reassure your leadership team that people like the idea of leaving a gift in their Will.

Appetite for legacy giving is growing all the time, with 40% of charity supporters aged 40+ saying they'd like to leave a gift in their Will. Take a look at our [research bank](#) for the latest legacy stats to help you make the case for investment and have a look at our Making the case for legacies webinar [here](#).

“ Unfortunately, in 2018 Oxfam took the decision to deprioritise and not invest in legacies. We were lucky in the sense that we still had some support from the marketing team (as they were aware of how legacies had contributed so much to the overall fundraising efforts of Oxfam previously), however, we couldn't reach anywhere near the full potential of that income stream without investment or dedicated resource.

When we introduced our new in-depth and research supported strategy in 2020, we were able to invest in legacies for the first time in 2-3 years – creating new pledger content, enquiry packs, legacy webpages, and growing a dedicated legacy team. Since then, we've gone from strength to strength!”



Sinem Bilen-Onabanjo
Head of Legacy Engagement, Oxfam

7. Celebrate your legacy successes

Legacy gifts can be transformational, but success stories aren't simply about the big gifts. It's important to showcase the breadth of legacy giving and to highlight a range of legacy successes.

These will vary depending on where you are in your legacy journey – from your first legacy through to one of a record level or a gift from a particularly close or intriguing supporter.

Share those success stories across your internal channels – whether that's at team meetings, via your intranet or a simple email update.

“ *We've invited senior leaders to join the legacy team for our 5'o'clock fizz at our offices to celebrate our team's achievements at year-end!* **”**



Kerry McMenamin
Legacy Fundraising Lead, Christian Aid



8. Normalise conversation about legacy giving internally

We talk about having an always-on approach to communicating legacies externally, but it's just as important to do so within your charity.

Talking legacies just the once won't make it part of your organisational culture – it needs to be communicated on a regular basis and across a range of channels.

What's more, people will change roles, with new staff, trustees, volunteers and others coming into the organisation afresh and needing to be brought on board with the importance of legacies.

“ *At Macmillan, we promote legacy messaging in as many organisation-wide comms as we can. We also maintain visibility at all Macmillan-wide exhibitions and conferences, through either a stand or speaking slot, which really helps to embed a legacies into different teams' ways of working.*

Our internal comms tool has a dedicated legacies section to help drive engagement, where each week we post both a 'Will Clause of the Week' (an example of a quirky or moving Will clause) and a 'Legacy Legend of the Week' (this can be a comment, quote or case study from a legacy enquirer or pledger). We also have an internal legacies working group, comprising of colleagues from across the legacies, relationship fundraising, and philanthropy teams, who produce a quarterly newsletter for all colleagues to update them on all things legacies. **”**



Craig Fordham
Director of Operational Delivery and
Legacies, Macmillan Cancer Support

9. Make legacies part of your organisational identity

Every organisation has its own brand and style. Consider how you can convey your legacy message in a way that will build on your internal messaging and resonate with your people.

“ *At CHAS, the children and families we care for are at the very heart of everything we do – including our [CHAS Alphabet](#). Each letter has been individually designed by one of the children or young people we care for, or a family member, and tell a story. They are bright, colourful, filled with fun and completely unique.*

When reporting on legacy income for the year, the team used the alphabet letters to create the names of everyone who had left a gift in their will that year. It worked really well - partly because of the visual impact, but I think more because it was taking a very well-known message that staff knew and using it cleverly!”



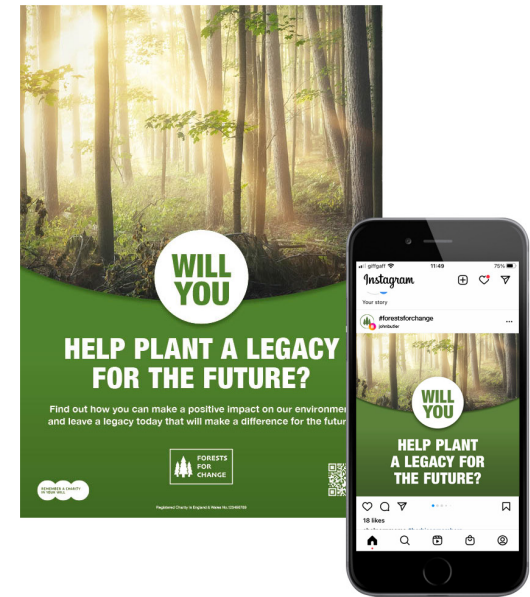
Charlene Mullan
Legacy and In-Memory Giving Coordinator,
Children's Hospices Across Scotland (CHAS)

10. Use Remember A Charity Week and our campaign resources to shine a light on legacies

Being part of a collective campaign gives colleagues confidence that legacy fundraising is absolutely normal, it's something that any organisation of any size can do. What's more, the income can be vital and substantial.

As a member, you can use our digital assets during Remember A Charity Week and beyond (internally and externally). If you've joined us recently, share your news about joining the consortium and what it means.

In the build up to Remember A Charity Week, this is a wonderful opportunity to open up dialogue across the organisation. Share your plans and what you hope to achieve or communicate to supporters during the Week, helping to ensure people across the organisation are not only inspired, but are equipped to become an extension of your legacy team. Check out the resources available on the member's area [here.](#)



For more information about legacies or to speak with a member of the Remember A Charity team please contact **info@rememberacharity.org.uk** or visit **rememberacharity.org.uk**

Remember A Charity is part of the Chartered Institute of Fundraising, which is incorporated by Royal Charter (RC000910) and is a charity registered in England and Wales (No. 1188764) and Scotland (No. SC050060).



**REMEMBER A CHARITY
IN YOUR WILL**