


**Developing effective  
bequest strategies for the  
arts**

by Richard Radcliffe FInstF Cert




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**Who am I?**

- 30 years in fundraising.
- 15 years in legacies
- I have met over 15,500 donors volunteers and users of charity services in legacy focus groups
- I have also met over 2000 supporters of arts organisations
- I have helped write over 600 legacy strategies
- And trained 1000s in how to make the ask for legacies
- I work throughout the world including USA, Canada, all of Europe, Scandinavia, Australasia, India, Israel, Singapore, Malaysia




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Legacies are not to do with death

**Giving a legacy is  
joyful.  
It is life driven  
and only death  
activated.**




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### tactics

- Reports that say that something hasn't happened are always interesting to me, because as we know, there are known knowns; there are things we know we know. We also know there are known unknowns; that is to say we know there are some things we do not know. But there are also unknown unknowns — the ones we don't know we don't know.

Thank you Donald Rumsfeld



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### These work

- **Listening** to the stories of your supporters do you give them the chance?
- **Honesty**: are you honest about how YOU feel about giving a legacy?
- **Joy**: happy messages are always best
- **Accountability**: are you telling everyone the difference they really make?
- **Transparency** –are you telling the best story on how you spend their money?



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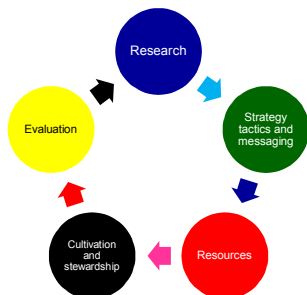
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### Legacy Fundraising Cycle



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## Legacy strategies

- **Research** competition, statistics and the marketplace, past legacies, attitudes (internal and external), motivations, communication needs (through focus groups, one to one meetings online surveys).
- **Strategy development** aim, objective setting, target audiences, methods of communication
- **Cultivation and stewardship** suspect → prospect → legacy enquirer → intender → pledger
- **Resources and budget**
- **Evaluation** – setting activity driven KPIs



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## Key UK statistics and the legacy market

- **Population** 61,383,000  
(up 480,000 on 2007)
  - **Deaths** 580,289
  - **Intestacy** 13%
  - **Legators** 35,000
  - **Legacies** 109,000
- Total value: £1.9 billion;  
16% of individual giving



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## Some examples of motivations

- A museum anthropologist has decreed his ashes will be flung in the eyes of the trustees of the British Museum.
- An art critic has designated that his ashes be mixed with breadcrumbs and scattered on the steps of the National Gallery so as to be reprocessed by pigeons as “action painting” that will communicate his views on such art to the trustees.



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### Arts and Culture legacies UK

- 2004 – 2,138 legacies
- 2009 – 2,989 legacies

Why increase? And will this increase?



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### Recent focus group outcomes

Ten arts bodies:

two galleries, three museums, opera company, two orchestras, community arts group, a history/culture society

- Friends/members we met: 490
- Number of Wills: 368
- Number of charitable legacies: 235
- Number of arts legacies: 72
- Number who said they WILL leave an arts legacy: 234



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### Questions and answers

- Why so many Wills?  
Because they are educated relatively well off people
- Why so many charitable legacies?  
Because they are educated relatively well off people!
- Why so few arts legacies?



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### Key issues

- Not thought of as a charity
- Loyalty is to location: museum/gallery/theatre
- Educational aspects of work are unknown and they are not interested
- They are self interested and focused on their enjoyment (and future enjoyment)
- They do NOT want Will making schemes
- 85% Dislike a Legacy Society




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### Quotes from committed Friends

*Why have you not left a legacy to X arts organisation when you have included charities?*

- *"It never occurred to me"*
- *"Is there a need for legacies? I can't imagine why there would be?"*
- *"It never even crossed my mind" and*
- *"I have no idea how you are funded – I presume our membership/subscription covers everything?"*

*I have 200 similar quotes!*




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### Australian demographics

2010	60-64	1,154,521
	65-69	857,837
	70-74	663,761
	75-79	533,076
	80-84	425,052
	85-89	251,259
	90-94	104,516
	95-99	30,899
	100+	5,082
2040	60-64	1,532,524
	65-69	1,477,644
	70-74	1,317,197
	75-79	1,134,435
	80-84	909,058
	85-89	611,030
	90-94	350,004
	95-99	124,759
	100+	38,346




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### Australian Deaths

- 2009 143,000
- 2040 267,000

What a great time to be in legacy fundraising!!!

But will longevity mean they will have very reduced assets left?

The Future: number of legacies ↑, values ↓




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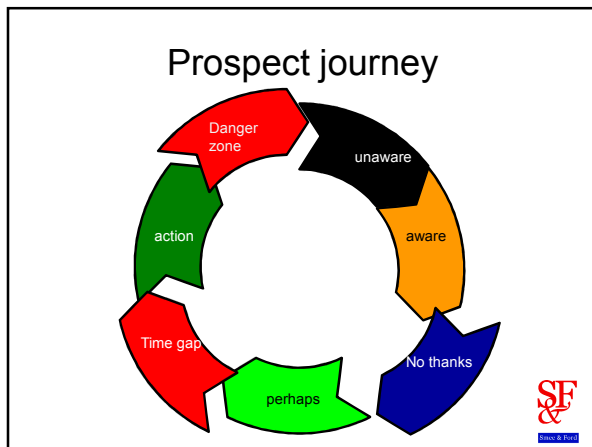
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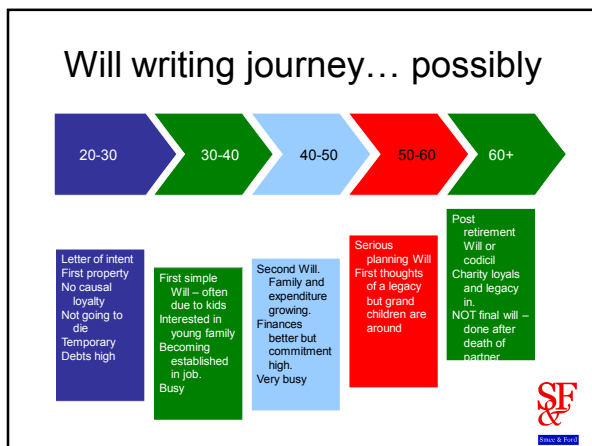
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### There is so such thing as a legacy campaign

- Messaging, words and images must be segmented
- Age: different strategies for older versus younger
- Wealth: Richer people need a different campaign to a “typical non-rich donor”
- Men and women are different



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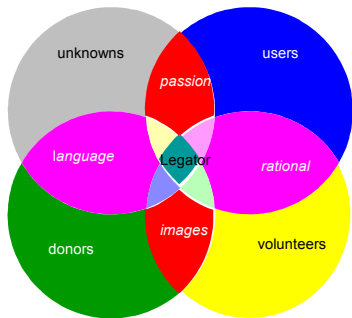
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### What gets to prospects



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### The only universal legacy issues



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### How do people want to be asked?

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



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### 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
- DVD 10% but not a legacy DVD
- Event - 95% but what type?
- One to one? – 5% - wealthy



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### Research results in general

- Nobody wants to be asked for a legacy – they want to be made aware of the need
- They want stories told by someone credible. Best: curator, artistic director, CEO, artist
- They don't want to use the words bequest or legacy
- They want to attend private rehearsals or previews and to meet "the stars"



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### Research results in general

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



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### Simple integration

Legacy message:

Every gift in every Will makes a difference  
however large or small  
If the time is ever right for you to remember Arts  
organisation X in your Will that would be  
fantastic  
&  
And please do not mention bequests!



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### Simple story telling

Every legacy message must be a story by someone

- Stories
- past legacies including quirky ones told by a fundraiser
- Will writing issues and tax benefits by lawyer
- Vision(s) by CEO or artistic director etc
- Financial transparency – CEO or Finance Director

PLEASE note a pledger does not feature!



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### ALL these work if the right objectives are set

Possible objectives for communicating legacies

- Give them the information to act immediately
- Make them aware of the outcomes of legacies
- To give them a vision so they know the effect of their legacy
- Ask them to promote legacies
- To meet the best prospects
- To inform them that a legacy costs nothing now
- To inform them of tax benefits of a legacy



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### ALL these work if the right objectives are set

Possible objectives for communicating legacies

- Give them the information to act immediately (committed donors)
- Make them aware of the outcomes of legacies (older people)
- To give them a vision so they know the effect of their legacy (younger people)
- Ask them to promote legacies (volunteers)
- To meet the best prospects (committed donors)
- To inform them that a legacy costs nothing now (lapsed donors)
- To inform them of tax benefits of a legacy and possibly recognition (Wealthy)



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### Hierarchy of legacy prospects

(but it depends on the cause)

- Committed donors/friends – female (10 + years)
- Committed volunteers
- Committed donors/friends – male
- Major donors
- Lapsed Friends



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Give them the information to act immediately (committed donors/Friends)

Method of communication →	Event, direct mail for those who cannot come
Tools to act	Words for Will or codicil if legal




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Make them aware of the outcomes of legacies (older people)

Method of communication →	Newsletters and events
Tell legator story but keep anonymous	Story told by beneficiary




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To give them a vision so they know the effect of their legacy (younger people)

Method →	Website + brochure
One vision or many?	Simple short vision in every email and enews




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## Ask them to promote legacies (volunteers)

Method →	Toolkit
Launch at event	Adverts posters brochures and contacts



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## To meet the best prospects (committed donors)

Method →	Event
Late morning for oldies and companions!	Memories, past successes, how money is spent, vision



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## To inform them that a legacy costs nothing now (lapsed donors)

Method →	Letter
Heading: No cost to you now	



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### To inform them of tax benefits of a legacy (Wealthy)

Method →	Website and possibly special fact sheet
Explanation in detail (and recognition)	Do not assume they know!



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### Where is the legacy brochure?

Gone!



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### Where are social media

- On another planet – not planet legacy.
- “Fatebook” not invented yet for legators



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### Where is advertising?

- OK if free for national and local NGOs
- Expensive even for big NGOs and if they do it every NGO benefits



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### Big question

Where does that leave “typical direct mail”?

- **Nowhere.....**
- **Possibly only:** integrated phrases



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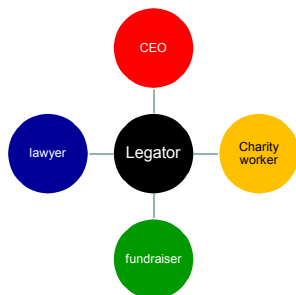
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### Story telling



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## Legacy vision

- Must be:
- Fundable
- Unique
- Credible
- Inspirational
- Tangible



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## Royal Opera House

- The generosity of patrons who have expressed their support by including a bequest for the Royal Opera House in their wills makes a vital difference in ensuring that the Royal Opera House that you know and love today will continue to flourish in the future.
- All bequests go to the Royal Opera House Endowment Fund, which makes grants to the Royal Opera House for ballet and opera productions, for education and outreach programmes and to help with the physical maintenance of the House.
- A leader in the international arts world, the Royal Opera House is the first arts organisation in the UK to build a significant Endowment Fund.
- This will help support, in perpetuity, the Royal Opera House's ambition of continuing to perform the finest classic opera and ballet, safeguarding the rich cultural heritage for which it is renowned, and the commissioning of new and innovative works critical to the ongoing development of the art forms.



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## English National Opera

- "I hope you will consider a bequest in your Will to safeguard the work of English National Opera for the enjoyment of future generations"
  - Sir John Tomlinson
- Making a bequest to ENO in your Will is a wonderful way to continue your tradition of support. Helping the Company to mount world-class new productions in years to come, while ensuring that future generations can experience the inspiration and pleasure that ENO has given you.



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## British Museum

- We are indebted to the many individuals who have already left a gift in their Will, enabling us to carry on our work of inspiring present and future generations and enriching the collection.  
As a non-profit organisation, the Museum relies on a variety of funding sources to support and develop the enormous collection and fulfil its many commitments.
- A legacy is a way of acknowledging the pleasure that the Museum has given you and many other visitors. Your gift ensures that we continue to connect the people of the past with the generations of the future.




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## National Gallery

- Imagine for a moment that it's April 1824. The government has just granted £57,000 for the 38 pictures in the collection of the banker John Julius Angerstein.
- Did anyone dream that 180 years later this collection would be the foundation for one of the world's best collection of European paintings?
- Every day almost 14,000 visitors are inspired, challenged and thrilled by a tour of our galleries. Every day hundreds of children enter through our imposing doors on a voyage of discovery, igniting their thirst for appreciating art.
- We are striving to grow our collection every year for the benefit of future generations and to carry out more research with our world leading curators, conservators and scientists.
- If you are inspired by our Gallery perhaps you would consider a gift in your will? A gift of any size will help us to grow our collection for future generations of children and adults whose enthusiasm for art can be triggered and nurtured while visiting our National Gallery.




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## Scottish Wildlife Trust

- Please remember SWT in your will
- With your help we can protect Scotland's wildlife. Without you, we can do nothing.
- Imagine Scotland's future without wildlife, without the sight of an otter slipping into cool water, or the smell of summer orchids, or the rustle of an evening breeze in an ancient woodland.  
Imagine if the children of the future were robbed of these experiences, if Scotland's wildlife was allowed to disintegrate and disappear.
- It doesn't bear thinking of. But how can you help?
- You can help Scotland's beautiful wildlife by remembering SWT in your will.
- We will use your legacy:
  - to fight the most urgent battles;
  - to save the most endangered habitats;
  - To inspire and enthuse children and adults to get involved, and to enjoy and contribute to our wonderful heritage
- Scotland's wildlife is a gift that we should treasure for future generations.
- Make Scotland's wildlife your legacy for the future




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### Pledging and misinformation

• **Care charity**

- Pledgers: 377
- Dead: 277
- Legacies: 2

**A university:**

- Pledgers: 37
- Dead: 13
- Legacies: 1

We have over 200 similar examples



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### You think your supporters are different?

Arts organisation (Museum)

- Pledgers 280
- **Dead pledgers** 130
- Legacies received 25

This is NOT just British ☺! Research in USA, Canada and Netherlands all show similar patterns! SORRY☺



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### Cultivation and stewardship



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### Enhanced programmes

- Test test test!  
Send all legacy communications to 50 donors/Friends asking  
"Would this work? Please help guide us"
- Send the above test to 50 donors every day!
- Direct mail: send on anniversary of when they first became a Friend and show how their support has developed your arts organisation Bookmarks!



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### Good luck

Some people bring happiness wherever they go.  
Others whenever they go  
Oscar Wilde  
Bye  
Richard Radcliffe



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### If you need me

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