

## Leaving a Lasting Legacy

Leaving a bequest or legacy is not something that everyone does – for example, in the UK only 13% of the population make bequests. According to the Charity Market Monitor 2009, legacies are worth around £2 billion per annum, whilst non-charitable estates are worth £40 billion. The cultural sector received 2.7% of the legacy total or approximately £54 million.

Just a small increase in the number of legacies made in favour of heritage and cultural organisations will make a major difference in the charitable income received. This information provides an overview for heritage and cultural organisations to create a legacy campaign or to review current campaigns so that more people become legatees and consider a bequest to a heritage organisation.

### How to set up your campaign

#### Identify and research your supporters

Look at your customer base, current Friends or Members. You already have a loyal base of supporters who understand the importance of your work. They may not currently have the financial resources to support you to the level they would like, but legacy giving provides them with an opportunity to demonstrate their commitment in a meaningful way.

#### Plan your campaign

Set yourself clear aims and objectives, taking into consideration the resources you have available.

Example aims:

- To increase legacy income over the next 5 to 10 years
- To raise awareness of your charitable status among supporters

Example objectives

- To develop legacy material for use on website/print
- To involve Board members in a legacy cultivation event

Think about how you will measure success. Wills are a very private matter - you may never know exactly how many supporters have responded to the campaign. However, there are other ways you can gauge how effective your campaign has been. For example, track visits to the legacy area of your website, or build in a response mechanism to any communications with supporters.

Make sure you have informed all staff and board members about your campaign.

### Make “the ask”

Your organisation will have its own central message and preferred channels of communication. Please think about how you want to approach, engage, and manage new and/or existing supporters, and use the channels that suit your target donors best.

For example - do you want to use existing marketing collateral or do you want to produce a legacy specific communication? Can you offer an additional incentive to supporters e.g. discount on tickets, invitation to bespoke event?

### Thanking and Stewarding

If a supporter informs you that they have left a legacy in their will, always send a personal thanks and acknowledgement. Good record keeping and stewardship are essential. Individuals give to your organisation due to a strong sense of belonging and personal association.

A legacy scheme allows you to build relationships and develop connections. Also remember to thank families when you receive the legacy.

### General “Ask” Text

You may wish to write your own copy for use in your campaign. Below we have provided a short “ask text” paragraph for you as a starting point. At the simplest level, simply slot in your organisation name:

“One of the most valuable gifts you can give someone is a legacy. After you have provided for family and friends, why not help continue our work for future generations and leave a percentage of your estate to **organisation name here**. You could reduce inheritance tax too.”

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