




Planning a Legacy Campaign from Scratch

With Simon George
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My Background

- ➡ Director of Wootton George Consulting
 - ➡ Fundraising since 1987
 - ➡ Legacy fundraiser for 20 years
 - ➡ Author of “Raising Legacies from Scratch”
 - ➡ NCVO StudyZone trainer on legacies
 - ➡ Passionate about legacies!
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The 3 P's of Legacy Fundraising

- ➡ People
- ➡ Proposition
- ➡ Promotional channels



- ➡ Which groups can you reach?
- ➡ How many are there?
- ➡ Add them up!
- ➡ Tip – if you have had legacies before, who left them?
What were they like? Can you find more like them?



The Proposition

- ➡ Must be inspirational and forward looking
- ➡ Think about what will motivate people to give
- ➡ Why should anyone support your charity?
- ➡ Develop a draft of 1 or 2 paragraphs
- ➡ Test it on people



- ➡ Think about the ways you can communicate
- ➡ Prioritise them (easiest/cheapest first)
- ➡ Integration works
- ➡ The importance of regular drip feed



Other Issues to Consider

- ➡ Who asks? Think about the best “voice”
- ➡ Developing a legacy culture
- ➡ Leave the jargon to the lawyers
- ➡ Test ideas before you commit
- ➡ Ask if you need help





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