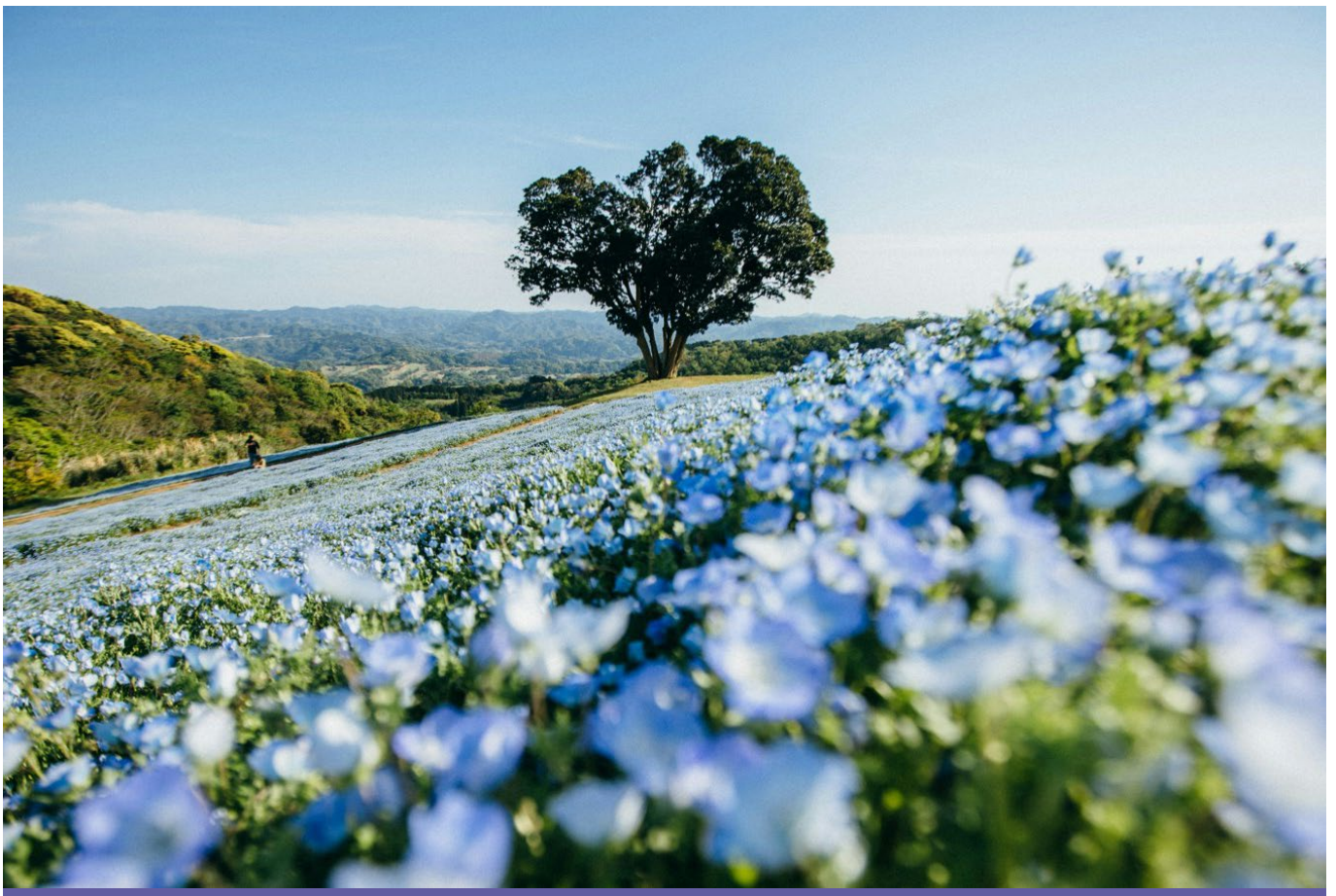


# In-Memory Stewardship: Deepening engagement with in-memory supporters

In-Memory Insight 2026/7

20 JULY 2026

PROPOSAL



In-Memory Insight explores the size, shape and scope of in-memory giving in the UK. We collect hard evidence to inform in-memory fundraising strategies and convince senior management of the value of in-memory giving.

In-Memory Insight is a consortium research programme run by Legacy Futures, working closely with a learning circle of leading charities – over one hundred in the last fifteen years – who agree to pool their budgets, experiences and data together to help build evidence and insight.

Every year, we focus on different aspects of in-memory giving and over the years the programme has explored different themes including: The links between in-memory and legacy giving (2018/19); in-memory products (2023/4); In-memory giving through the lens of faith and culture (2024/5) and most recently Tribute funds (2025/6)

This year's programme will run from September 2026 to April 2027 and will deep dive into the world of **in-memory stewardship**, an issue that is very much on the agenda for in-memory fundraisers. It's a topic we covered in 2019, but much has changed in the in-memory landscape since then. Consumer behaviour has changed, the pandemic and aftermath has impacted how people think about death and bereavement. And, in-memory stewardship has become a focus for many more charities, all aiming to build deeper and more meaningful relationships with in-memory supporters, to give their supporters the best in-memory experience and to provide opportunities to continue their support over the long term.

## Key programme objectives

This new programme aims to build on learnings from the 2019 programme and:

- Understand how the in-memory stewardship landscape has evolved and changed since our 2019 programme
- Advance thinking on in-memory stewardship journeys and the ecosystems they exist in with particular focus on key transition moments.
- Understand more about the different types of in-memory supporters, their experience of in-memory stewardship and identify the approaches that resonate.
- Uncover future opportunities and develop practical outputs and best practice principles to help consortium members optimise their in-memory stewardship practices
- Provide an updated picture of the size and scope the In-Memory giving market



I am coming away with lots of ideas for how we can optimise our in-memory programme, reach new audiences and increase awareness and buy-in across the organisation.

Danielle Morgan

Pancreatic Cancer UK

## Proposed research approach

During this programme, we will focus on the following key research stages.

### Desk research

As part of the desk research, we will explore the different definitions and objectives of stewardship. We will review previous IM stewardship programme and outputs from other previous in-memory programmes to collate everything we already know about stewardship and how the landscape has changed since 2019. We will revisit the theory around loyalty and supporter journeys (from both the charity and commercial sectors) and we will consider how stewardship is evolving and explore future trends.

### Members survey

The members survey will provide a useful snapshot of current in-memory stewardship practices across the consortium and is an opportunity to identify key challenges and obstacles.

### Supporter research

Through qualitative interviews we will explore a range of supporters who have acted in memory in different ways, to understand more about their initial and evolving motivations, how they are giving in-memory, their experience of in-memory stewardship and what's working and resonating well with supporters. We will also aim to understand more about the key transition moments within an in-memory supporter's journey and the barriers to engaging further or giving a second or subsequent gift.

### Best practice case studies

We will feature a number of case studies from members of the consortium covering different aspects of in-memory stewardship to help share best practice e.g. journey planning, internal stewardship, KPIs and demonstrating the effectiveness of stewardship, stewarding in-memory supporters who engage in other areas of fundraising (e.g. events/ community).

## Performance benchmarking

We will update the performance benchmarking for the most recent year and as in last year's cycle, data collected will include:

- Resourcing of in-memory fundraising – i.e. staff numbers and fundraising budgets
- Income from:
  - Funeral collections and other 'unsolicited' in-memory donations
  - Money raised through tribute funds
  - Money raised through specific in-memory campaigns such as Light Up A Life

As last year, the outputs from the benchmarking are no longer anonymised, with member organisation names included alongside their numbers in the dashboards created, rather than referring to organisations by sector and a letter. This development was included to enhance the data and increase its usefulness for participants.

Member charities will be provided with a data template (in excel) and a detailed briefing note to help them supply the right data. The Legacy Futures team will also be available via email for further guidance as necessary. We will be collecting data in November/December for the year up to end of September.

We recognise that not all charities will be able to supply all the data requested, either because they do not carry out this form of fundraising or because their systems are not set up to capture the information.

If you cannot supply some of the benchmarking data by the agreed deadline, you will still see the totals and averages for the group, but your own record will remain blank. If you cannot supply any (or a

significant proportion) of the benchmark data by the agreed deadline, then your charity may be excluded from the analysis and you will not receive the benchmarking report or spreadsheet. In this case, the final arbiters of whether a charity can receive the benchmarking report and spreadsheet are the In-Memory Insight steering group.

## Market scoping survey

We conduct a large scale consumer survey at regular intervals to track the take-up and value of in-memory giving activities. This data is used to estimate the size and shape of the in-memory sector, which is fundamental for many charities in developing their strategies and investment plans.

The last such analysis was carried out in in 2022. Since then there have been significant market developments – including the recovery from the pandemic, the continued shift to online giving, new digital platforms and increasing investment in in-memory fundraising – so we are keen to understand how the market has changed.

The updated survey will cover: key demographics of in-memory donors, types of in-memory donation(s), relationships to the deceased, channels used, cause areas, amounts given/raised, payment methods, communication with/feelings towards the charity and intentions to continue to give/fundraise in-memory in the future.

## Project outputs

The findings will be presented in a series of workshops, along with a benchmarking report and an executive summary report, summarising all the learnings and outputs from the programme, aimed at senior managers and colleagues from other teams.

The conclusions will be developed into a practical toolkit to support in-memory fundraisers in their day to day roles.

There will also be opportunities throughout the programme to discuss issues and findings together as a consortium as well as reflect on how to put the learnings into practice for your organisation.

## Project timeline

|                                                                                                                                                                                                                    |                                                                                                                                                                                                                                               |                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>September 2026</b> <ul style="list-style-type: none"> <li>Confirmation of consortium members</li> <li>Programme kick off – invoices and new member contracts issued</li> <li>Desk research commences</li> </ul> | <b>October 2026</b> <ul style="list-style-type: none"> <li>Steering group meeting</li> <li>Members survey launched</li> <li>Identification of case studies</li> <li>Compilation of in-memory benchmarking data by member charities</li> </ul> | <b>November/ December 2026</b> <ul style="list-style-type: none"> <li>First workshop (online)</li> <li>Qualitative research to commence</li> <li>Prep for market scoping survey</li> </ul> |
| <b>January 2027</b> <ul style="list-style-type: none"> <li>Field market scoping survey</li> <li>Analysis of in-memory benchmarking data</li> <li>Analysis of market scoping survey</li> </ul>                      | <b>February/ March 2027</b> <ul style="list-style-type: none"> <li>Second workshop (benchmarking)</li> <li>Final workshop (in-person)</li> <li>Steering group meeting</li> </ul>                                                              | <b>April 2027</b> <ul style="list-style-type: none"> <li>Executive summary and public briefing written and circulated</li> </ul>                                                           |

## Learning circle membership and costs

The cost per organisation for a 12-month cycle is based on your charity's average legacy income, from the previous 3 financial years 2023/24, 2024/25, 2025/26 drawn from Charity Commission data:

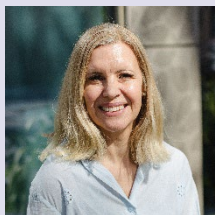
Over £5m: **£3,800** + VAT

Under £5m: **£2,650** +VAT

The deadline to sign up is **Monday 7<sup>th</sup> September 2026**.

## Follow on consultancy - In-Memory Supporter Journey Planning

At Legacy Futures, we can help you plan a new supporter journey for your in-memory supporters to give you the best chance of success – whatever stage you're at. Please get in touch with us if you'd like an initial conversation about this to find out more about how we can support you.



To find out more or to sign up to our programme, please contact:

**Claire Truswell,**  
[claire.truswell@legacyfutures.com](mailto:claire.truswell@legacyfutures.com)



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# Legacy Futures

Legacy Futures, together with Smee & Ford is the UK's leading charity consultancy group that specialises in gifts in wills and in-memory giving. We provide the legacy giving data and analysis services that drive the UK market. And we are trusted partner to over 1,000 charities in the UK and worldwide, supporting them to harness the transformative power of legacy giving.

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## Legacy Futures

Legacy Futures is best known for research, analysis, and strategy. We work with charities large and small, UK and International, turning insight into strategy and action.

[legacyfutures.com](https://legacyfutures.com)

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## Legacy Link

Legacy Link is the UK's largest team of estate administration consultants, helping to maximise the gifts left to a charity, and adding value at every step of the way.

[legacyfutures.com/link](https://legacyfutures.com/link)

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## Smee&Ford

Smee & Ford provides timely and accurate legacy notification services for administration teams to optimise their services.

[smeeandford.com](https://smeeandford.com)

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