



# Hospice Legacy Circle

How to grow your legacy income

2024/5

**Legacy  
Futures**



# Why join the Hospice Legacy Circle

Now in its fourth year, the Hospice Legacy Circle is a group of hospices who come together to learn and share about all things legacy. The programme offers best in class workshops in legacy fundraising and administration, expert technical advice and valuable market intelligence.

As other income sources decline, our research indicates that legacy giving will grow significantly over the next 10 years. However, the market is becoming more competitive, with many national and local charities also targeting your potential legacy donors and their legacy income is growing faster than yours.

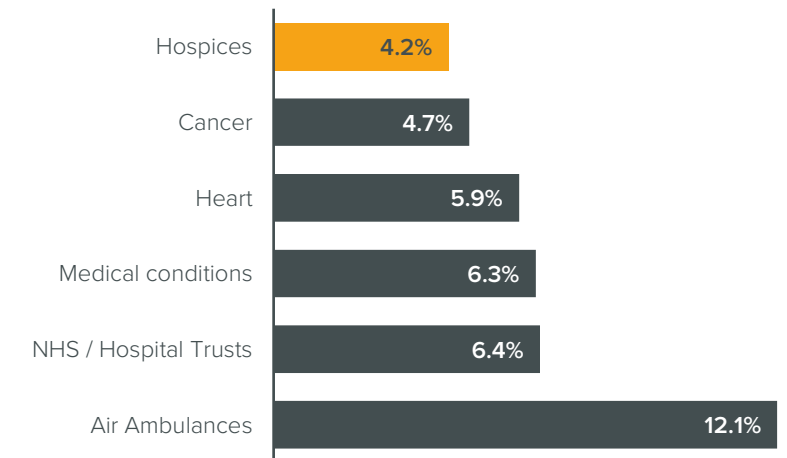
In the hospice sector, gifts in wills make up 46% of total fundraised income, compared to 28% in the wider charity sector. This high percentage shows that supporters are naturally inclined to give to your cause

due to a mixture of gratitude for care received and loyalty to 'local heroes'. However, it also means you rely more on legacy income than other causes.

In the Hospice Legacy Circle, we work together to strengthen resources and share ideas and best practice. We give you the practical tools, insight and skills needed to grow legacy income for your hospice.

## Underlying income growth

% p.a., 2011/12-2021/22



Just such a level of detail, specifics, and practicalities alongside the theory. Such tangible learnings.

Rachel Gedge

Legacy and In Memory Giving Relationship Manager  
CHAS



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An insightful and helpful balance between sector insight and expertise offered by the Legacy Futures team, coupled with practical examples and knowledge from the participating hospices. The data dashboards that the team have developed have been invaluable.

**Janet Abraham**  
Head of Fundraising  
Claire House Children's Hospice



# Workshops, benchmarking and practical support

## Key benefits of being part of the programme

- Be part of a group of collaborative hospices with the common goal of driving legacy giving
- Access the latest legacy market trends and insights
- Understand your real-time legacy data and how it compares to your peers, your sector and the market
- Learn from your peers about their experiences and activities in the legacy space
- Tangible advice on effective marketing collateral



Its great...Why aren't more hospices part of it?

David Pond  
Individual Giving Manager  
Keech Hospice Care

## The proposed themes for this year's programme

**Legacy  
Futures**



### Online workshops

The latest legacy market trends and forecasts, and what they mean for hospices, together with tailor-made tools and advice on legacy marketing, administration, and forecasting.

### Benchmarking

Interactive data dashboards to understand the legacy market, examine patterns in your own performance and compare these to other hospices individually, regionally, by type, or to the hospice sector overall.

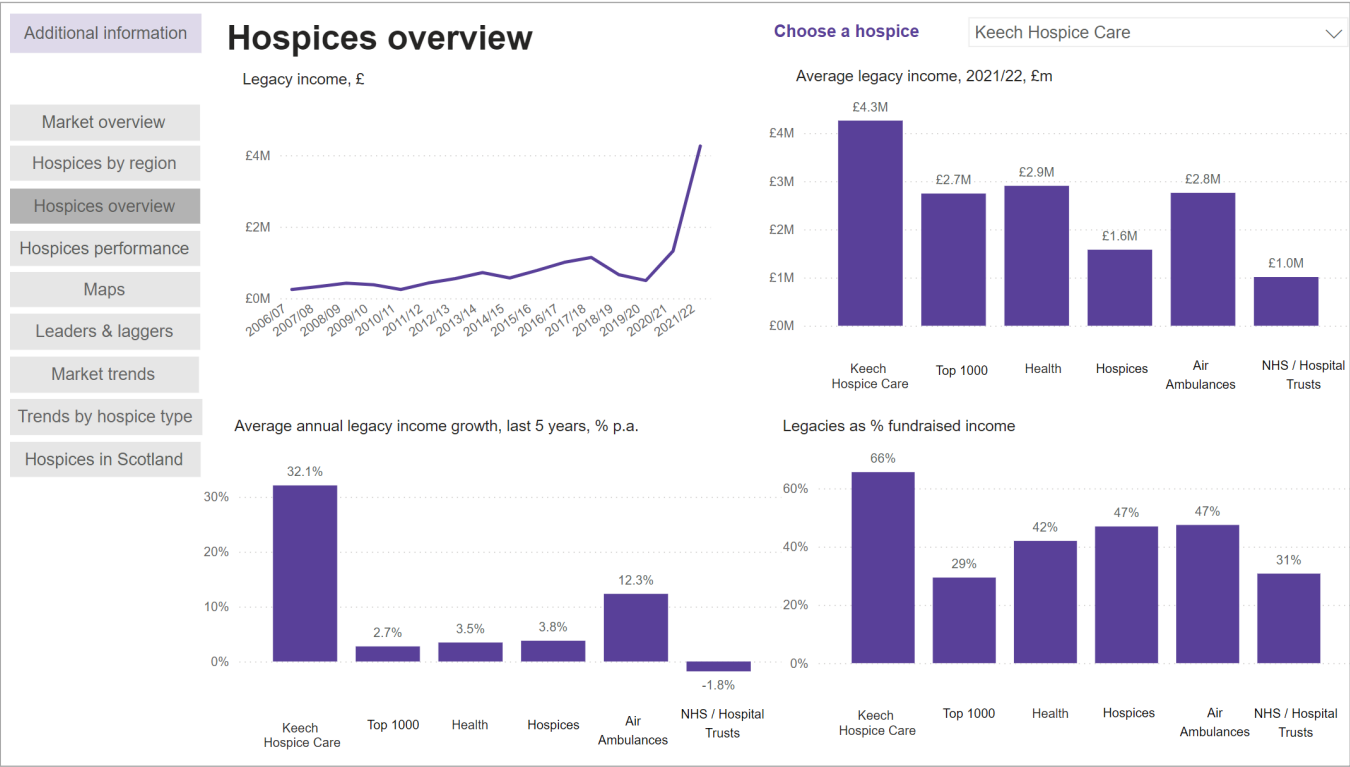
### Brochure review

In depth evaluation of your legacy marketing collateral together with a bespoke report highlighting strengths and areas for improvement.



# Understand the trends in legacy giving

Our hospice benchmarking provides information about the legacy market and your performance within it. Insight is drawn from the NCVO top 1000 charities as well as members legacy income and bequest data. Analysis on your legacy marketing spend and activities will add further insight.



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Hospices undoubtedly have strong emotional and practical connections to their communities. But – in these days of ever more economic and social uncertainty, and in an increasingly competitive environment – you can’t expect the money to keep rolling in. Just thanking and banking is not an option.

Claire Routley  
Head of Consultancy



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What we most valued from last year's Hospice Circle were the website review and having the opportunity to explore each topic further in breakout rooms. Another great year!

**Stephanie Cuff**

In Memory & Gift in Wills Fundraiser  
Keech Hospice Care



# Our team of expert consultants is trusted by the sector



**Claire Routley**  
Head of Consultancy

Dr Claire Routley has worked in fundraising for over fifteen years, specialising in legacy fundraising for the last decade. In 2011, Claire completed a PhD looking at why people choose to leave legacies to charity. She has worked for Bible Society, Age UK, WRVS and a local hospice, and teaches the Chartered Institute of Fundraising's qualification courses. She is now Head of Consultancy at Legacy Voice, alongside a part-time position as a Post-Doctoral Research Associate at the University of Kent's Centre for Philanthropy. She is also a member of fundraising think-tank Rogare's international advisory panel, and was named AFP's emerging scholar 2017.



**Claire Truswell**  
Group Client Services Manager

Since 2018 Claire has been working with the Legacy Futures Group of companies to make sure we deliver the very best value and quality to our clients. She also plays a key role in establishing team culture, collaboration and clear communication across the business. Claire has over 20 years of commercial experience, her varied career has encompassed PR, project management, internal communications and event management for which she has travelled all over the world organising large-scale meetings and events.



**David Burland**  
Consultant

David Burland has extensive experience in the hospice movement. His first role was as Marketing Director at Princess Alice where instigated their first ever legacy marketing campaign. He then worked at Hospice UK, firstly as Director of Income Generation and later as Deputy CEO. In 2012 David became CEO of Shooting Star Children's Hospices. Since setting up db associates, David has worked with over 40 different charities, including undertaking income generation reviews for several hospices. He set up the Hospice Legacy Circle with Legacy Futures in 2021, reflecting his belief that Gifts in Wills remains an area of great potential for the hospice sector.

## The wider Legacy Futures team Providing additional expertise



**Ashley Rowthorn**  
Chief Executive Office



**Lucy Lowthian**  
Senior Consultant



**Paul Browne**  
Head of Legacy Administration



**Doug Clow**  
Head of Analysis

# Across every size and type of hospice

Just a few of our 32 members in 2023



**Brian House**  
Children's Hospice



**CHAS**  
Children's Hospices Across Scotland



**Claire House**  
CHILDREN'S HOSPICE



**Doug Mac**



**Havens Hospices**



**Hospice**  
ISLE OF MAN



**Keech**  
hospice care



**Kirkwood**  
The Hospice for Kirklees



**myton**  
hospice



**NOAH'S ARK**  
children's hospice



**Oakhaven**  
hospice



**Princess Alice**  
Hospice



**rainbows**  
hospice for children and young people



**ST CATHERINE'S**  
HOSPICE



**St Helena**



**St John's**  
Hospice



**St Luke's**  
Sheffield's Hospice



**Thames hospice**



# An annual cycle

## November – October

The programme is based on a paid for yearly membership. Last year we had 32 participating hospices – our highest ever number. We are hoping for even more this year.

- Five online workshops
- Interactive data dashboards
- Benchmarking analysis
- Legacy brochure review
- New joiners' session

Annual cost: £2,300+VAT

### Combined offer

For hospices who also join our In-Memory Insight programme we are offering a combined fee, based on your legacy income.\*

Under £3m: £3,300+VAT

Over £3m: £4,400+VAT

\*For In-Memory Insight and Hospice Circle the cost per organisation is based on your charity's average legacy income, from the previous 3 financial years 2021/22, 2022/23, 2023/24 drawn from Charity Commission data.



I always have positive takeouts and ideas from the sessions. I enjoy the openness of other hospices.

Imogen Othman  
Marketing Manager  
Princess Alice Hospice

## We look forward to hearing from you

If you would like to join the Hospice Legacy Circle or if you have any questions, please email Claire Truswell.

**Deadline to sign up is Friday 18th October.**



**Claire Truswell**

Group Client Services Manager

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# The Legacy Futures family

**Legacy  
Futures**

We work with charities around the world to harness the transformative power of legacy giving. We believe it's time for a new integrated approach to legacy giving, from the first connection to the final donation. To make every legacy count and secure the future of your charity.

## **Legacy Foresight**

### **Insight and analysis**

Benchmarking, research and forecasting in the sector to inform legacy giving strategies.

## **Legacy Voice**

### **Strategy and communications**

Insight and strategy into actions to transform your legacy giving potential.

## **Legacy Link**

### **Estate administration**

Secure and grow your income with our skilled administration consultants.

