

Redefining stewardship in a changing legacy landscape

01 DECEMBER 2024

PROGRAMME PROPOSAL



Introduction

Legacy stewardship is at the heart of successful legacy fundraising, helping charities build meaningful, long-term relationships with supporters. By engaging, inspiring, and nurturing these connections, charities can guide supporters along the journey from **interest** to **intention** to **action**¹. But as the legacy landscape evolves, so too must our stewardship practices.

All charities approach legacy stewardship in different ways but it has come into its own over the past decade as charities have invested more and more in both resource and marketing to build and maintain relationships with their legacy supporters. Channels and ways to engage supporters have evolved and changed, digital channels have become more prominent and legacy fundraising teams have had to constantly innovate and change to meet supporters where they are at and take them on a legacy ‘journey’.

Today’s legacy audiences are more varied than ever—not just in demographics, but also in their attitudes, values, and how they choose to engage with charities. While many legators are happy to share their intentions, research consistently reveals a significant group who prefer to remain invisible, withholding their plans from the charities they support. This dual reality makes stewardship more complex, requiring tailored approaches that cater to both visible and invisible legators, ensuring no supporter is left behind.

At Legacy Futures, we’re turning the spotlight back onto legacy stewardship with a cutting-edge programme designed to help charities future-proof their strategies. This initiative brings together deep expertise, actionable insights, and collaborative learning to empower legacy fundraisers to stay ahead in a crowded and competitive environment.

What you’ll gain

This programme is designed to give your charity:

- **Tailored Insights:** Understand the changing dynamics of legacy stewardship, from evolving supporter expectations to cutting-edge innovations in digital engagement.
- **Practical Tools:** Access checklists, templates, and frameworks to assess and enhance your stewardship practices.
- **Future-Focused Strategies:** Learn how trends like AI and technology can revolutionise your stewardship approach.
- **Collaborative Learning:** Engage with best-in-class examples and cross-sector expertise to inspire new approaches.
- **Evidence-Based ROI:** Gain tools to measure and articulate the impact of stewardship on legacy income.

¹ **Interest** – to find out about gifts in wills; **intention** – wanting to leave a gift when they change or make their will or to be open to the idea of leaving a gift; **action** – executing/ carrying out the intention and writing a charity into the will.

Key programme plan and approach

Over the course of this programme, we will explore the dynamics around legacy stewardship, how supporters are feeling about being stewarded and the challenges charities are currently facing.

We will also look to the future at the key trends that have potential to impact on stewardship practices.

Through a number of different research stages we aim to:

Explore how stewardship has evolved over time

We will look at how legacy stewardship has changed since COVID and whether some of the innovative digital practices introduced in the absence of face to face opportunities have endured. We will also consider how expectations are changing when it comes to relationships with charities and the way supporters are interacting with them.

Explore the different dynamics and challenges surrounding stewardship journeys

We will look at how charities are currently stewarding their different audiences, how charities are creating memorable experiences to surprise and delight their supporters and what the supporter experience is. We will explore how legacy stewardship journeys interact with other activity from across the charity as a whole; how charities are linking their legacy marketing activities to pledging decisions and how legacy fundraisers are working with other areas of fundraising to collaborate and strengthen relationships with supporters.

Explore the different ways in which we can measure the effectiveness of stewardship

We will look at the different objectives of stewardship, the KPIs being used to measure effectiveness and examine whether there are any other measures that can be used to help demonstrate impact and value.

Identify future trends that will impact stewardship

We will outline some of the key trends that are expected to affect stewardship practices – in the short to medium and long term. We will spotlight on AI and identify areas in which it could be utilised to improve/enhance different elements of the stewardship journey.

Research outline

Desk Research

- We will explore the key principles and learnings on best practice for legacy stewardship to date and will look to apply learnings from the commercial world and the evolution of customer loyalty marketing.
- We will also look to identify key changes since our Stewardship programme in 2018 and identify the key trends that will affect legacy stewardship in the future.

Members survey

- We will gather a snapshot of current stewardship activity from our consortium by looking at the approaches and methods charities are currently using to steward their legacy audiences, the different types of journeys and programmes they have in place, the data or insights associated with transitioning supporters along the legacy journey, the tools and platforms they use to deliver their activity, the barriers and challenges they are facing and how they are measuring impact.

Case Studies

- We will spotlight on 4 or 5 charities and highlight examples of innovative legacy stewardship programmes currently in place to showcase best practice and encourage cross consortium learning.
- We will look to cover different areas e.g. innovative use of technology, experiential experiences and we will try to look back to some of the stewardship programmes covered in the 2018 programme to understand how they have evolved over time and the impact they have had.

Supporter Research

- We will carry out qualitative research with legacy audiences to gain a deeper understanding of the stewardship experience.
- We will explore their attitudes and expectations towards their relationships with charities, how they are currently being stewarded and how the communications they are receiving or the 'journeys and programmes' they are on are impacting their relationships with the charities they support.

Deliverables

Two interactive workshops:

- Kick-off Workshop (Virtual, 2 Hours): Setting the stage for learning and collaboration.
- In-Person Workshop (1 Day): Immersive discussions and hands-on learning in London

Comprehensive outputs:

- Recordings and presentations.
- An executive summary with actionable insights.
- A tailored Stewardship Toolkit to refine your strategies.

Optional Consultancy:

- Personalised recommendations to help charities implement the programme learnings
- Delivered as a report and action plan
- Cost £1,600+VAT – to include:
 - 1x 1hr call with legacy fundraiser/ key contact – to discuss the charity, their situation and give any relevant context and background
 - Review of members survey
 - Bespoke recommendations for charity with 3 tier recommendations – things to do now, soon, future
 - 1hr virtual presentation/ meeting to present output

Going through the stages and the factors behind each thought process/decision behind each stage in the stewardship journey.



Timetable

February 2025 Kick-off and desk research.	March–May 2025 Member survey, virtual workshop, and initial findings.	June–July 2025 Supporter research, case studies, and in-person workshop (2 July 2025).
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Programme fee

Join our Learning Circle for 12 months and unlock unparalleled access to expertise and resources.

Costs are based on average legacy income (2021–2024):

Over £3m: £3,400+VAT

Under £3m: £2,275+VAT

Sign up by emailing Claire Truswell, claire.truswell@legacyfutures.com by **27th January 2025**.

Make Stewardship Your Competitive Edge

Don't miss this opportunity to redefine your legacy stewardship practices, enhance supporter relationships, and drive sustainable growth. Together, we'll navigate the future of legacy fundraising with confidence.

I found the supporter experience part particularly useful as I can use this for our other donors (I work in stewardship) re surprise and delight.



Legacy Futures

Legacy Futures is the UK's leading charity consultancy that specialises in gifts in wills and in-memory giving.

We are a trusted partner to 330 charities worldwide, supporting them to harness the transformative power of legacy giving.

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Legacy Futures brings together three expert teams:

Legacy Foresight

Legacy Foresight is best known for its forecasting, benchmarking and research, often working with charity consortia to gain greater insight into Legacy and In-Memory markets.

legacyfutures.com/foresight

Legacy Voice

Legacy Voice helps charities improve their legacy marketing strategies and communications, working with charities large and small, UK and International, turning insight into strategy and action.

legacyfutures.com/voice

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

