LSS24 AGENDA

Legacy Strategy Summit 2024 - 18th June 2023, online 09:30 – 16:30

09:30-09:35		**Welcome intro, housekeeping, and audience polls.**	Suzanne Watts, **Smee & Ford**
09:35-10:00	**Update**	**The Smee & Ford 2024 Insight into Legacy Giving Key Trends** In this session, we share up-to-the-minute insights on where we are halfway through the year. A deep dive into the legacy giving data that all legacy fundraising professionals need to watch. Includes time for Q&A	Mark Pincher, Head of Data Analysis, **Smee & Ford**
10:00-10:10	**10 mins**	**BREAK**	
10:10-10:50	**Panel**	**Diversity & your legacy donor base – does your digital campaign reach all potential audiences?** Digital legacy campaigns offer a powerful mechanism to reach out to your donor base – but does it reach beyond your usual audience? In this session, we hear from a panel of legacy experts on how they are ensuring legacy communications are engaging all types of donors – and how charities can amend their campaigns to connect with new pools of pledgers. • Is your campaign diverse enough? How to find the gaps in your legacy universe • How to connect and engage with diverse supporter audiences – faith, ethnicity, age, income level, UK location • Using the right comms to ensure your campaign is accessible to all donor personalities. • What does an inclusive legacy campaign look like?	Anaish Yilmar Parmar, Head of Legacies, **British Red Cross** Joe Pindar, **Consider Creative**
10:50-11:05	**15 mins**	**BREAK**	
11:05-11:45	**Case studies**	**Multi-functional Legacy Events – strategies for combining acquisition, conversion, and stewardship.** In this session we hear how different sizes of charities are maximising the productivity of their legacy events by designing occasions that spark donor interest, create new pipelines of pledgers, and engage and inform existing supporters.	Caroline Donald, Senior Relationship Manager, **UNICEF**

		We will learn how they: • Created cost-effective events to increase the number of legacy pledgers. • Educated, informed and engaged a wide audience of supporters and donors. • Raised the profile of legacy giving and highlighted the work of their legacy giving team to other colleagues in charity.	Emily Ding, Gifts in Wills Manager, **Canal & River Trust**
11:45-1200	**15 mins**	**BREAK**	
12:00-12:30	**Insight**	TBA	TBA
12:30-12:40	**10 mins**	**BREAK**	
12:40 – 13:10	**Panel**	**Future-proofing your free will offering.** With recent media attention highlighting the continued rise in contested cases, we ask our panel what legacy fundraisers might do to reduce future disputes. Our panel will be talking about: • Legal and ethical considerations around free will offerings • Selecting the most suitable will offering for your charity and providing your donors with choice. • The fallout from "Zoom" wills • Law commission consultation: Possible changes to the laws surrounding wills from 2025. • Implementing joined-up thinking and better collaboration between legacy administration and marketing teams re will offerings.	Andrew Wilkinson, Partner and Head of Legacy and Trust Disputes, **Shakespeare Martineau LLP** Rebecca Grey, Solicitor TEP Senior Manager Legacy Management, **Age UK**
13:10-13:15		**SUMMARY OF MORNING, Survey & Poll**	
13:15-14:00	**45 mins**	**LUNCH BREAK**	
14:00-14:05		**WELCOME BACK, SUMMARY OF MORNING AND SURVEY**	Suzanne Watts, **Smee & Ford**

14:05 – 14:50	**Case studies x 3**	**Small but mighty: Reach beyond your budget and deliver legacy projects on a shoestring.** Legacy teams within charities must make every penny of their legacy programme count. But which legacy teams leading the sector with their ability to deliver amazing programmes on a small budget? In this case study session, we examine outstanding & effective examples of legacy projects produced “on a shoestring budget. • A deep dive into shortlisted entries from the Legacy Giving Awards 2024 which highlight the creativity behind legacy projects working to a tight budget. • Gain first-hand inspiration, technical insights, and money-saving tips on budget legacy programmes. • How to stretch your available resources whilst still delivering a quality project.	Lizzy Steward, Legacy Officer, **Essex Wildlife Trust** Grace Cunningham, Legacy Engagement Officer**, Northwest Air Ambulance Charity** Fiona Watson, Associate Director of Fundraising, **The Hospice of St Francis**
14:50 – 15:05	**15 mins**	**BREAK**	
15:05-15:40	**Insight**	**The search for new legacy prospects: Micro-mining your donor database:** With regular fundraising streams struggling in the ongoing cost of living crisis, how can legacy teams meet increased income targets? We investigate: - • The benefits and challenges of cultivating a new, wider pipeline from previously un-stewarded donor contacts. • How can legacy teams better utilise existing and new data? • Gaining deeper insights into donor behaviour, patterns, and interests. • Following signposts within each donor journey – mapping key touchpoints and increasing the potential for legacy pledges.	Chris Lincoln, **Smee & Ford** Sarah Seddon, Head of Planned Giving, **Combat Stress** Sarah Rebus, Legacy Manager, **M S Society**
15:40-15:55	**15 mins**	**BREAK**	
15:55-16:25	**Keynote**	**The hardest two words in legacy fundraising: “Thank you”** A thank you letter should be the start of a journey, not the end. And the way we say thank you to executors, next of kin, enquirers, and pledgers can kill or	Richard Radcliffe, **Radcliffe Consulting**

		secure legacies from future generations let alone ruin your relationship with Will makers. This session will focus on the best language to use when communicating with people who are potentially at the start of a new journey with your charity, not at the end of a journey concerning the deceased. With contested Wills rapidly growing, it's more vital than ever to protect and enhance your brand and reputation with every donor communication. • How to refine the message in communications to Next of Kin, Executors (professional / family), Life interest recipients, In-Memory donors, and new pledgers. • Understanding the complex journey of each contact • Making the Thank You the beginning of a new donor relationship.	
16:25-16:30		**Summary, survey, end of day polls. CLOSE**	Suzanne Watts, **Smee & Ford**

On demand sessions

Reawakening your legacy campaign: 8 ways to make a national campaign feel local, authentic & vital. Launched in 2023, Oxfam's "Stay in the Fight" TV campaign, was stage one of a strategic journey to reawaken interest in this heritage charity brand after a pause in legacy fundraising. Stage two has taken a much more targeted, and local approach. The session will reveal why Oxfam's decision to trial its new messaging in one regional UK "donor hotspot" has proven to be a highly effective way to progress and embed its legacy relaunch and connect with new donor groups. With 8 key insights, including: • Focusing on the authenticity of your message & refreshing the narrative • Putting your beneficiaries at the front and centre of your story • Adopting a local multi-channel strategy - retail, press, TV, Radio • Connecting with a multi-generational supporter group A must-view for any charity that aims to refresh its legacy message whilst retaining its loyal supporter community.	Claire Barber, Legacy Engagement Manager, **Oxfam**

Encouraging legacy giving amongst your team, charity & wider network A simple way to grow your pledger pipeline is to encourage legacy giving inside your organisation and with your non-charity partners. The session will: • Uncover five ways that legacy fundraising and corporate fundraising can work effectively together to increase gifts in wills. • Reveal why and how employers are providing Will writing offers to their teams and partners. • Explain why organisations need to demonstrate Social Value, and how you can incorporate this strategy into your charity or company.	Clare Sweeney, Founder, **Keepace**
Legacy Reporting: Using KPIs and goals to track your Legacy Strategy Legacy fundraising can take years or even decades to produce results from a campaign, so how can legacy professionals log and report the progress of their efforts? And what can they do to ensure they are on track to deliver the required income – and check that their campaign is making the required impact? This session looks at the benefits of: • Redefining donor data capture - KPIs, time-related goals and benefits • More detailed reporting & forecasting of progress • Improving stakeholder management & reassuring your SLT • Using KPIs as a method of legacy team motivation	Mary Taylor Lewis, Legacy and In-Memory Giving Manager, **York University**