

Building better futures in legacy fundraising 2024

Recruiting and retaining talent and furthering career paths

07 OCTOBER 2024



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This study spotlights staffing issues in legacy fundraising that reflect the challenges faced by the entire fundraising profession around recruitment and retention of skills and experience.

The strategic recommendations and practical advice from the senior legacy professionals who have collaborated here will have immense value for legacy teams and will help inform the wider sector's work in this area.

Ceri Edwards
Executive Director of Change
Chartered Institute of Fundraising



Thank you to all the contributors to this report for their support, in particular:

Adam Buckles, Alzheimer's Society	Lucinda Frostick, Remember A Charity
Anaish Yilma-Parmar, British Red Cross	Michelle Adelman, North London Hospice
Andrew Sawbridge, Parkinson's UK	Tish Ley, The Guide Dogs for the Blind Association
Barry Hunt, UCL	Turner PR, www.turnerpr.co.uk
Jon Jacques, Amnesty International	

Introduction

Charities are facing increasing challenges in finding and retaining talented legacy fundraisers.

This leads to questions about where and how new talent can be sourced; how to nurture and retain the necessary skills required for this important area of work; and how to prevent losing talent and experience to other areas of the sector, and indeed to other sectors entirely, due to lack of career progression.

To understand the recruitment and retention issues facing the UK legacy fundraising sector today and identify challenges and potential solutions for the future, **Legacy Futures** sent a brief online survey to approximately 320 senior legacy marketers in the largest UK charities. This was conducted via the **Legacy Leaders Forum** and **Remember A Charity** and its members. The survey was completed by 52 respondents over the period 13 March to 2 April 2024.

The Legacy Leaders Forum is an informal special interest group facilitated by Legacy Futures and made up of senior legacy fundraisers representing 19 charitable organisations in the UK who, between them, generate over £1 billion of legacy income each year.

The findings were considered by the Legacy Leaders Forum and Remember A Charity in a focus group, which produced a set of strategic recommendations along with practical advice for overcoming these challenges.



A successful legacy income stream can be vital for an organisation's sustainability and resilience, with longer-term income from established legacy fundraising programmes giving much-needed stability in challenging economic times.

Legacies can be hard to predict, but history shows us charities that invest in legacies and their legacy teams are most likely to see growth in their market share. Our people; their knowledge, creativity and passion for the cause are surely our biggest assets, alongside our supporters. And as more charities move into the legacy sphere, it becomes even more important that we grow and nurture talent.

Lucinda Frostick
Director
Remember A Charity

**REMEMBER A CHARITY
IN YOUR WILL**
Help the work live on...



Speak to any ILM member and they will tell you their work makes a huge contribution to their charity's finances, that the role is incredibly varied, and that they love the work they do. So why does the legacy sector seem to have a recruitment problem?

This report provides excellent insight into the reasons why and makes some extremely worthwhile suggestions about how charities can do more to attract and retain key legacy personnel. I would urge any charity to consider these findings and be prepared to think 'outside the box' when it comes to engaging with both the retention of current and the recruitment of new legacy team members.

Matthew Lagden
CEO
Institute of Legacy Management



By shining a light on what makes legacy giving an increasingly vital part of the fundraising sector, it is hoped we can work together to encourage the best talent from in and outside the sector to consider a fulfilling career in legacies.

We appreciate that challenges with recruitment and retention are not unique to the legacy sector, and would encourage and support broader research across the wider charity sector to better understand the common challenges, opportunities, and shared goals faced.

This report recognises that the recruitment and retention challenge has been viewed through the lens of legacy fundraising, and not also legacy administration, where similar challenges are being experienced.

It is hoped this report will start a wider conversation amongst legacy fundraisers, legacy administrators and the wider fundraising sector that will lead to more people considering a career in legacy giving and seeing their charity careers flourish by having legacy giving on their CV.

Key headlines

Recruitment

The top 3 recruitment challenges for senior legacy marketers

77%

identified a **shortage of quality candidates**, with junior and legacy manager roles the hardest to fill, suggesting a problem attracting younger or less experienced candidates into the sector.

75%

said there is a shortage of candidates with **the right legacy skills**.

52%

said candidates are **unwilling to work for the salary offered**.

Retention

The top 3 reasons why charities are struggling to keep legacy marketers

67%

are being tempted away by **competition from other charities**.

61%

are leaving due to **salary dissatisfaction**.

53%

are leaving for promotions at other charities because there is a **lack of career progression in their existing role**. Nearly half also said their teams are not offered training and development.

Strategic recommendations

In response to the report, the Legacy Leaders Forum makes six high level recommendations for the sector. These are explained further in Part 2 of this report.

1. Create a pathway

for legacy leaders to become charity leaders.

2. Celebrate the personal qualities

and strategic skills of those who are doing the job.

3. Build awareness

of the transferable skills and qualities that make a great legacy marketer, distilling them into a simple skill set.

4. Remind the sector

of the critical and growing contribution of legacy income, and the need for legacy expertise at the helm for charities to survive and thrive.

5. Look outside the sector

for those who possess the characteristics and qualities to make great legacy fundraisers.

6. Inspire people

to consider a deliberate move into legacy fundraising as a desirable career choice.



Part 1: Survey findings

Survey results analysis identified a wide variety of challenges faced by charities in both recruiting and retaining staff in legacy fundraising roles. The top three challenges for these areas are as follows:

Recruitment challenges

1. Shortage of quality candidates

The top issue in recruiting for legacy fundraising roles is attracting enough quality candidates (77% of respondents reported this as a challenge), with junior and legacy manager roles the hardest to fill.

2. Shortage of legacy skills

This was closely followed by attracting candidates with the relevant skills (75%).

3. Salary dissatisfaction

The third was finding those willing to work for the salary offered (52%).

Retention challenges

1. Competition from other charities

The majority of respondents cited employees being tempted away by offers at other organisations (67%) as one of the main retention challenges.

2. Salary dissatisfaction

Salary concerns also play a part in the issue of staff retention, and was the second most mentioned by responders (61% of all responses).

3. Lack of career path development in their existing roles

Legacy employees are seeking promotions elsewhere that are not available at their current organisation (53% of all responses). We also noted that close to half of respondents reported that additional training and development opportunities were not offered to their teams.



The potential in the legacy giving area means there has never been a better or more important time to demystify the career opportunities, by demonstrating the wide skills you can bring from a broad range of careers and those you can develop and nurture in this incredible sector. Equally we need to demonstrate the career paths that can be realised as you mature and grow in the sector.

Tish Ley

Product Manager Legacies & In Memory
The Guide Dogs for the Blind Association



Recruitment in depth

Over the past two years, the top three challenges with recruiting into legacy fundraising positions have been attracting: (1) enough quality candidates, (2) candidates with the relevant skills, and (3) candidates willing to work for the salary offered.

In the survey comments, respondents also report issues with salary levels and job titles:

“The main issue for me is the salary we are able to offer certain legacy roles - particularly administration - which is below what many other charities are offering for the same positions. This affects the quality of candidates we can attract as well as retention - many see better salaries for the same responsibility and rightly go after that.”

“[Putting] Marketing in the title makes candidates feel it's all online marketing when actually for this audience we want candidates with a range of marketing experience, especially direct marketing/print.”

Recruitment issues by legacy role

The most challenging roles to recruit for are legacy manager and junior legacy positions, followed by senior legacy positions and head of legacy. Only 8% of respondents are recruiting for directors of legacy. The weighted average for each of these roles indicates the degree of difficulty faced by respondents in recruiting for them.

Some of the comments point out that they “do not have specific legacy giving roles” or that they “only have one legacy manager role”.

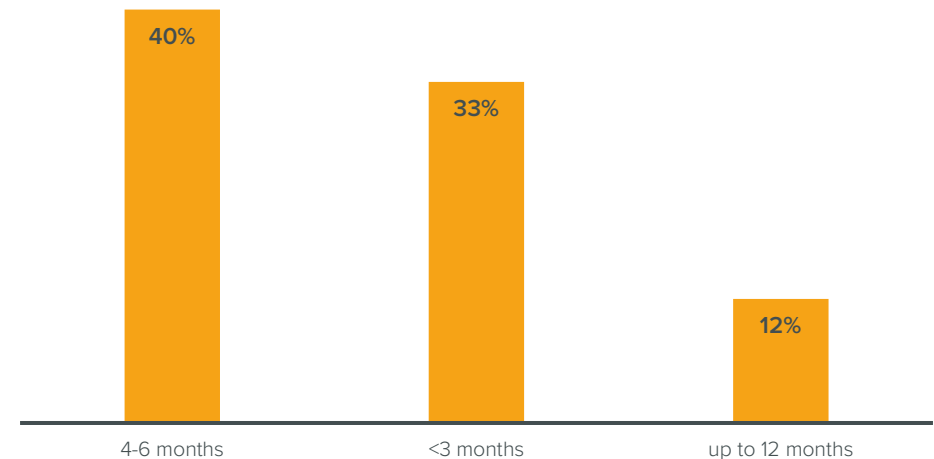
Another respondent reports that their legacy team is unable to recruit legacy marketing specialist roles:

“...these roles sit in our Comms & Marketing team therefore the legacy team is not involved in recruitment. They have chosen to appoint non-legacy specialists with marketing skills, which we have then upskilled in legacy marketing.”

The time it takes to recruit legacy roles

Most respondents shared that the length of the recruitment process can be problematic – taking longer than many other roles, with 40% reporting that it has taken 4-6 months, followed by 33% saying less than 3 months, and more than one in ten respondents (12%) reporting that filling legacy roles can take up to a year.

Recruitment timeframe



Recruitment strategies

Charities are taking several steps to address recruitment issues – especially when there is no additional cost required: nearly three-quarters (73%) of respondents have allowed for more flexibility; 60% have hired from other areas within the organisation; 54% have changed the language or style of their job adverts or descriptions; and close to half (48%) have hired from other sectors. Certainly, more organisations would benefit from adopting these approaches.

Over half of respondents (56%) say they haven't improved the careers page on their website. This presents an opportunity for charities to consider how they can enhance their websites to help attract more candidates and interest.



When asked which of their recruitment strategies had proven most effective, the most mentioned were:

19%

hiring from other sectors

15%

offering more flexible working arrangements

10%

working with recruitment agencies

The next most effective strategies were **focusing on transferable skills; offering more competitive salaries; and recruiting internally.**

Flexibility is a key theme among respondents, with comments such as:

“Looking at different areas outside of charity and fundraising. We have two ex-teachers that we have recruited, and they have been outstanding.”

“Flexibility in approach, recruiting for skills and experiences beyond the sector that can be transferable.”

“The flexibility and ability to speak to the team in advance of interview has helped.”

Retention in depth

Retention issues

Respondents overwhelmingly report that legacy fundraising employees are being tempted away by offers from other organisations (67%), and relatedly, that employees are dissatisfied with their salaries (61%).

67%	61%	53%	47%	43%
poached by another organisation	salary dissatisfaction	leaving for career progression	lack of professional development	lateral move within the same organisation

Another significant finding relates to issues with career progression in legacy fundraising, with over half (53%) reporting employees seeking a more senior position currently unavailable at their organisation; close to half (47%) citing lack of professional development; and 43% reporting that employees are securing promotions or lateral moves within the organisation.

Discomfort in talking about death and dying is not reported by anyone as being a reason for poor retention.



These are worrying statistics, but not surprising ones. Senior legacy fundraisers are often seen as too niche to be able to work elsewhere in organisations or progress further up the ladder outside of just a legacy remit. The reality is that most senior legacy fundraisers have a skill set that covers multiple disciplines that could be put to great use, but are currently being held back by a lack of understanding as to what they actually do.

Adam Buckles
 Head of Legacies & Special Events
 Alzheimer's Society



Retention strategies

The survey revealed that a great deal of internal education is being conducted on legacy fundraising, with a majority of respondents reporting that they have been educating the wider fundraising team (71%), all teams within the charity (59%) and the board/trustees (59%) on the importance of legacies and, for the board/trustees, the importance of investing in the legacy strategy.

Just over half (51%) reported increasing salaries to help overcome retention issues; however, only 43% offered staff promotions. Three-quarters (75%) of respondents haven't expanded their employee benefits package, 59% haven't improved working conditions, and close to half (47%) haven't offered additional training and development opportunities. There is a clear opportunity for organisations to improve their offering to employees.

Retention strategies (qualitative)

Just over 88% of respondents provided detail on their most effective retention strategies*. The most commonly mentioned strategies are **more flexible working** (33%), **salary increases** (28%) and **internal education and promotion** (15%).

Strategies taken to improve staff retention

	Number of responses	% respondents (46)	% all survey respondents (52)
More flexible working	15	33%	29%
Salary increases	13	28%	25%
Internal education/promotion	7	15%	13%
Promotions	6	13%	12%
Training & development opportunities	4	9%	8%
Staff recognition	2	4%	4%
Expanded employee benefits	2	4%	4%

***Note:** 46 responses are included in the analysis. This is because 1 respondent skipped the question and responses such as "N/A" and "I don't know" have been excluded.

Part 2: Strategic recommendations and practical advice

Recommendation 1

Create a pathway for legacy leaders to become charity leaders.

Identify and remove the myths and barriers that exist in charity leadership (among executive directors and boards) which create a ceiling in legacy fundraising career paths and lead to the loss of fundraising talent from organisations and the sector. In turn, appeal to talent making their next step, encouraging them to opt for a career in fundraising, rather than accidentally fall into it.

Practical advice

1. Work with the Chartered Institute of Fundraising and other industry bodies to develop more advanced legacy fundraising training. This could include the introduction of official qualifications specifically designed to support legacy fundraisers in their skills and career development.
2. Audit and outline clear career pathways in the journey of legacy fundraisers towards leadership by identifying and documenting their unique skill set.
3. Develop an informal mentoring scheme, where senior leaders help more junior colleagues to grow and develop in their roles.



Given how important gifts in wills are for so many charities, the need for passionate specialists within the sector is massive. As teams and marketing budgets increase, we need charities to work together to inspire and develop the next generation of people looking to make a career in the legacy sector.

Andrew Sawbridge
Head of Legacies
Parkinson's UK

PARKINSON'S^{UK}

Recommendation 2

Celebrate the personal qualities and strategic skills of those doing the job.

Celebrate the strategic thinking, creativity, innovation and long-term focus of legacy fundraisers working to achieve sustainable, transformational growth for our causes through legacy marketing excellence.

Practical advice

1. Work with organisations, such as SOFII, to share case studies, showcasing and celebrating individuals' career pathways to directorship.
2. Work with the Institute of Legacy Management and other industry bodies to develop campaigns which celebrate individuals' successes and show an organisation's love and appreciation for their legacy managers.
3. Acknowledge the superpowers of legacy fundraisers! Legacy fundraisers are open, approachable, trustworthy and have emotional intelligence in spades – all remarkable qualities worth shouting about.



Legacy fundraising has come on leaps and bounds over the past decade, yet many charities are still finding it difficult to find and recruit quality candidates. If we hope to capitalise on the incredible opportunity that will come to the fore over the next 20 years, it is vital that we work together now to attract and retain the most talented people.

Barry Hunt
Legacy Giving Lead
UCL



Recommendation 3

Build awareness of the transferable skills and qualities that make a great legacy marketer.

Increase awareness of the extensive range of transferable sales and marketing skill sets required in delivering successful legacy fundraising strategies, such as: relationship management, partnership development (e.g. legal providers), philanthropy, events management, and direct, digital and brand marketing. Support these skills with a reputable training pathway.

Practical advice

1. Encourage your senior leaders to talk about the achievements of the legacy team, the various roles within the team and the skills it takes to be successful.
2. Develop a competency framework for legacy fundraising, demystifying what a great legacy fundraiser looks like and the skills needed to become one.
3. Create infographics that help people connect with and understand the key elements, skills and qualities required for legacy fundraising.



As a sector, we have a wealth of passionate and experienced people, who wake up every day wanting to make a difference in the world. Our strength comes from collaboration, innovation and learning from each other, and also bringing the best practice and ideas from outside of the sector.

As leaders we need to continue to invest in our people and be brave to see the potential in those who have transferable attributes. They may not 'tick the box' on paper, but by bringing more diversity into fundraising, and specifically legacies, we only benefit how we connect with the ever changing public and charity supporters of the future.

Anaish Yilma-Parmar
Head of Legacies
British Red Cross
Chair of Remember A Charity



Recommendation 4

Look outside the sector for people with the life skills to make great legacy marketers.

Encourage interest from those with transferable sales, marketing, data, legal, wealth management, personable and education skills from outside the sector by emphasising that this is a purpose driven environment where their contribution is valued, and their career will thrive, supported by high quality training and personal development planning.

Practical advice

1. Encourage recruitment agencies and hiring managers to cast their net wide.
2. Reach out to schools and universities to offer work experience opportunities specifically in legacy fundraising.
3. Draw parallels with skills common to other professions – helping potential talent see legacy fundraising as a viable and desirable career option.



“

I've had huge success in recent years in recruiting individuals from other sectors, including veterinary, design and architecture backgrounds, into entry-level legacy fundraising roles. Each and every one of our legacy fundraising assistants, no matter their previous experience, has gone on to progress within the fundraising sector, not necessarily into legacy fundraising. It's a brilliant springboard and first role in the sector. As legacy leaders, we can widen our nets and attract the best talent out there!

Michelle Adelman
Individual Giving Manager
North London Hospice



Recommendation 5

Remind the sector of the critical and growing contribution of legacy income now and in the future.

Remind the UK charity sector how legacy income will be a driving force for fundraising income growth over the next 25+ years, and the need for charities to build over time a legacy giving culture from top to bottom to survive and thrive.

Practical advice

1. Ask your charity which income streams they're depending on now to ensure they survive and thrive into the future and if they're really investing in the people and culture to support this.
2. Use external validation by, for example, bringing in a third party to present market data. This can often have more impact on senior leaders who may be more inclined to listen to external insight.
3. Surface the best macro statistics and data regarding the intergenerational transfer of wealth.

Recommendation 6

Understand why more people are not considering a move into legacy marketing.

Consult with and survey fundraisers outside of legacies to better understand if they would consider a career move into legacies and if not, why not. Discover how legacies are perceived compared to other areas of fundraising.

Practical advice

1. Change the language used – particularly in job descriptions – to be more appealing, accessible and easy to understand.
2. Approach relevant organisations, such as the Chartered Institute of Fundraising and Remember A Charity to gain insight from their teams and members.
3. Work with partners, such as the media, to conduct surveys to gauge perception of legacy fundraising roles among the sector to discover, e.g. perceptions of the role's impact, value, recognition and prospects.

Conclusion

For the reasons explained, this report has focused on recruitment and retention challenges experienced in one segment of the charity market, namely legacy fundraising.

And whilst it may be that some of the findings are specific to that segment, we hope they will prove valuable to other segments across the market facing similar issues.

The full data will be made available to the Chartered Institute of Fundraising, who are currently undertaking research into recruitment and retention across the wider fundraising sector.

The responses reveal that over the last 2 years, recruitment and retention, especially of more junior legacy roles, have been and continue to be causes for concern. Organisations have had to make changes and try new approaches to attract and retain talent, such as increasing salaries and offering increased flexibility.

Despite the adaptations organisations have made, responses suggest that other opportunities remain as yet un- or under-explored, such as improving the careers section of the website or offering employees added-value benefits.

It is encouraging to see that some organisations have widened their pool of candidates and taken a more inclusive and accessible approach to recruitment by looking outside of the fundraising sector for new talent.



The data gathered from this survey offers crucial insights that can guide the sector in crafting innovative strategies to address its recruitment and retention challenges. It is our aim and ambition that this report can serve as a helpful aid for informing campaign design and decision-making that nonprofits of all sizes can take advantage of.

Ashley Rowthorn
CEO
Legacy Futures

**Legacy
Futures**

Appendix: Survey results

Survey design and questions

The survey contained 10 questions:

1. What is your organisation's legacy income per year?
2. In the past two years, to what extent have these issues in recruiting legacy fundraising candidates affected your organisation?
3. In the past two years, to what extent has your organisation experienced challenges in recruiting for the following roles?
4. In the past two years, how long has it taken you, on average, to fill vacant roles?
5. In the past two years, has your organisation taken any of the following approaches to try to overcome these recruitment issues?
6. Which approaches above have been the most effective in addressing recruitment issues?
7. In the past two years, to what extent have these issues in retaining legacy fundraising employees affected your organisation?
8. In the past two years, has your organisation taken any of the following approaches to try to overcome legacy fundraising employee retention issues?
9. Which approaches above have been the most effective in addressing employee retention issues?
10. Would you be willing to tell us a little about YOUR career? If so, please select the option below that best reflects the next step in your career path.

Questions about the most effective recruitment and retention strategies (Q6, Q9) were open-ended, and three additional questions (Q2, Q3, Q7) provided an opportunity for respondents to provide additional detail via comments.

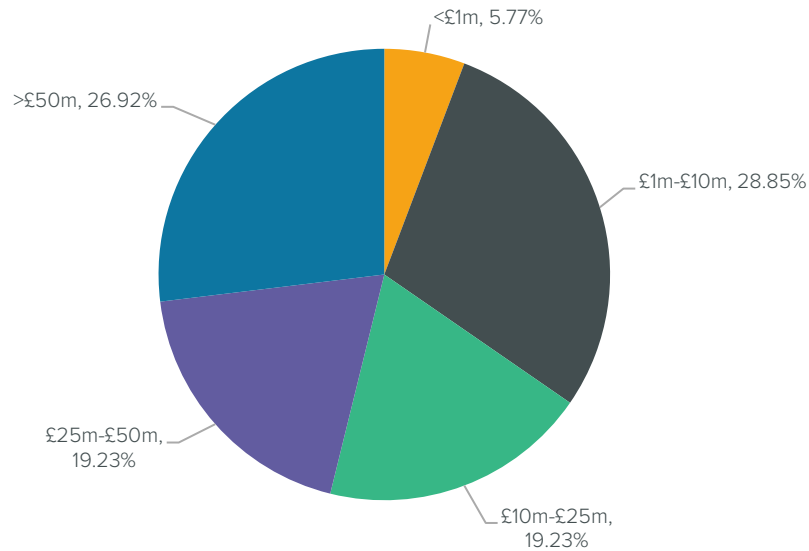
Survey pool

The survey was sent to senior legacy fundraisers based in the UK. Recipients included members of Legacy Futures, the Legacy Leaders' Forum and Remember A Charity.

Annual legacy income by organisation

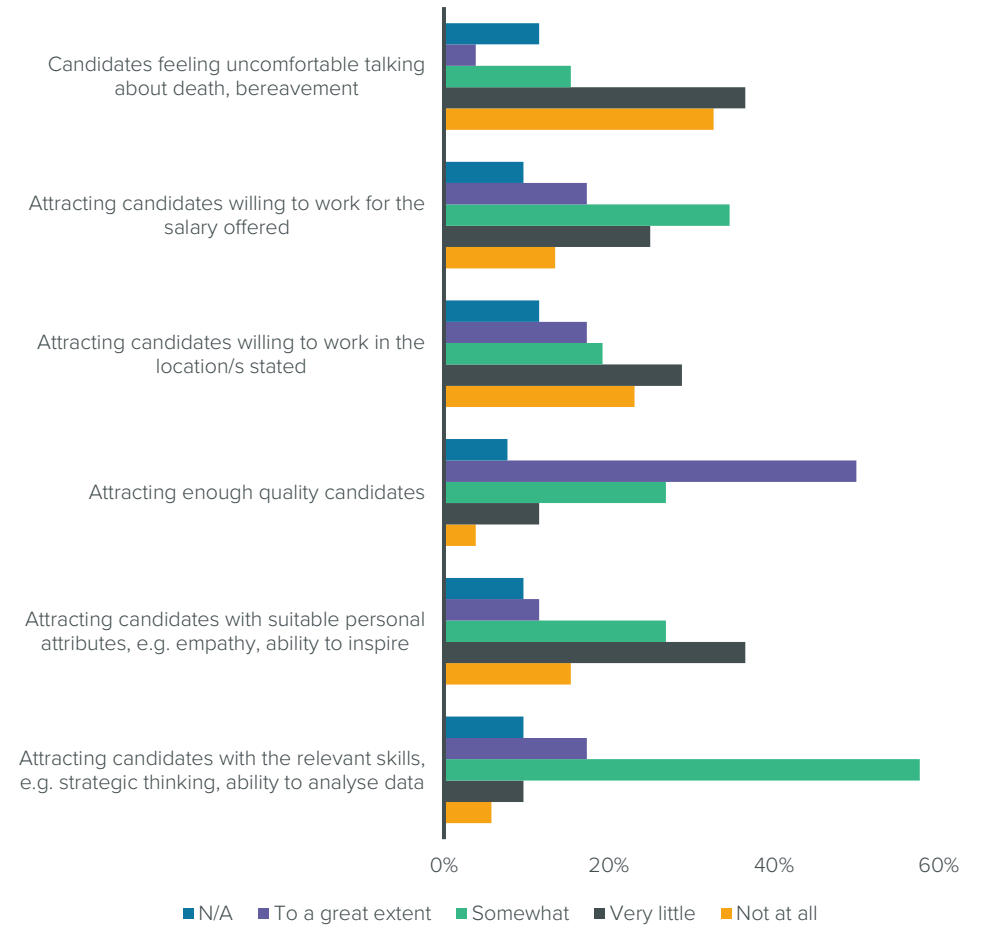
The 52 respondent organisations represent an array of legacy fundraising programmes sizes in terms of annual income, with the largest numbers of organisations falling into the £1m-£10m and >£50m categories, respectively.

Question 1: What is your organisation's legacy income per year?

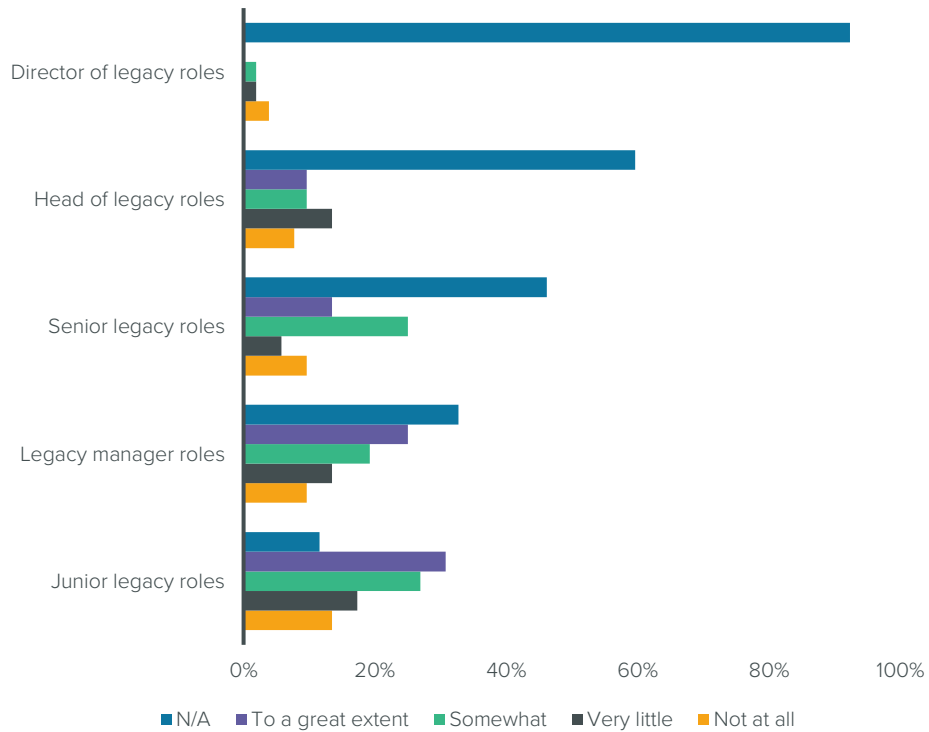


Recruitment issues charts

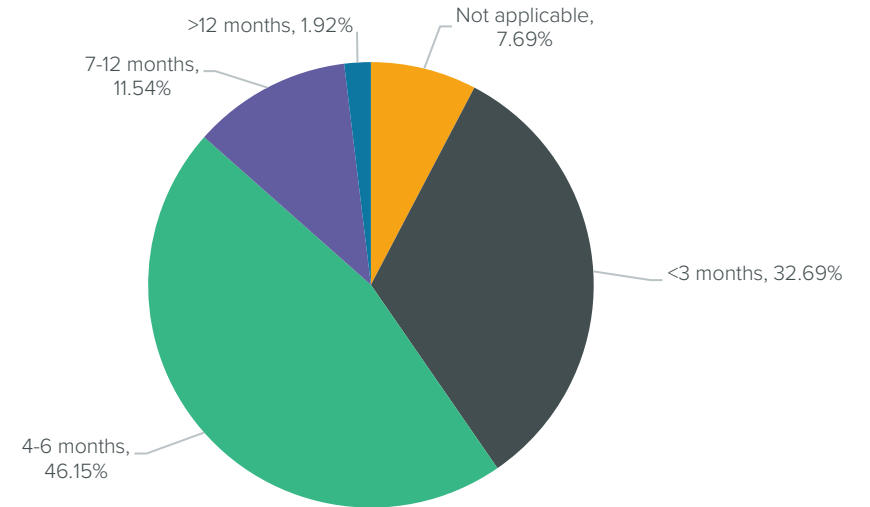
Question 2: In the past two years, to what extent have these issues in recruiting legacy fundraising candidates affected your organisation?



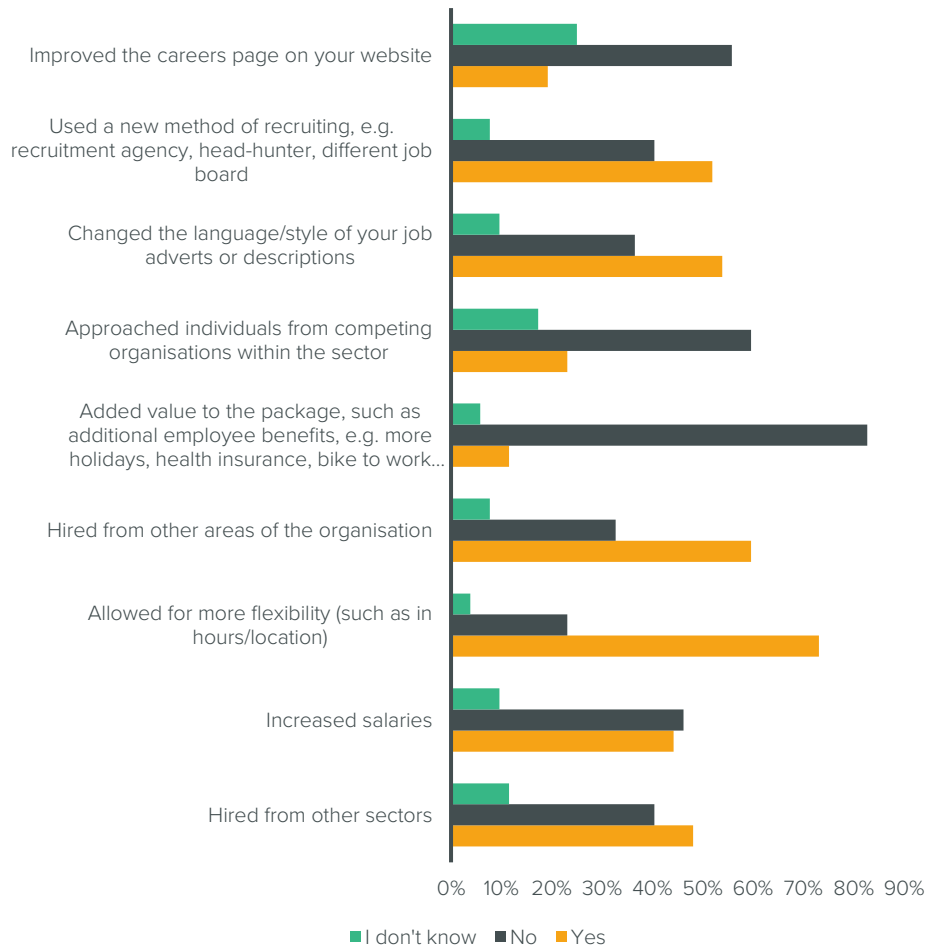
Question 3: In the past two years, to what extent has your organisation experienced challenges in recruiting for the following roles?



Question 4: In the past two years, how long has it taken you, on average, to fill vacant roles?



Question 5: In the past two years, has your organisation taken any of the following approaches to try to overcome these recruitment issues?



Question 6: Which approaches above have been the most effective in addressing recruitment issues?

Recruiting internally

- *“Recruiting from other areas such as IG.”*
- *“Encouraging internal candidates.”*
- *“Flexibility; hiring from elsewhere internally; raising salaries.”*

Recruitment agency

- *“Building a good relationship with the recruitment agency and viewing candidates on a rolling basis. Being patient for the right candidate.”*
- *“Recruiter but volume and quality still an issue.”*
- *“Recruitment agency as even direct applicants can see their ads then come direct.”*
- *“Probably using recruitment agencies.”*

Competitive salaries

- *“Offering competitive salaries and reducing office attendance requirement”*
- *“Ensuring salaries are competitive is a must first and foremost, otherwise why would a candidate want to take the role that offers £3k less if they have the choice? Providing flexibility is also very important - staff don't have to be located in one place (unless a specific regional role) so that has really helped and has changed the make up of our teams dramatically. As well as location flexibility, working hours is approached similarly - whether that be condensed working, etc. - we will provide whatever we can so long as it doesn't negatively impact on the outputs of the role.”*

- *“Increasing salaries.”*
- *“Flexibility; hiring from elsewhere internally; raising salaries.”*

Hiring from other sectors

- *“Looking at different areas outside of charity and fundraising. We have two ex teachers that we have recruited and they have been outstanding.”*
- *“Flexibility in approach, recruiting for skills and experiences beyond the sector that can be transferable.”*

Flexibility in recruitment

- *“The flexibility and ability to speak to the team in advance of interview has helped.”*

Flexible employee offering

- *“Allowing for flexibility.”*
- *“Allowing flexible working - not just hybrid with expectation to be in London 2-3 days a week which still requires candidates to live within distance of London.”*
- *“Offering more flexibility with roles - eg condensing working hours, reduced hours across a working week.”*
- *“Flexibility of location and hours.”*
- *“Flexibility as to location.”*
- *“Flexibility; hiring from elsewhere internally; raising salaries.”*
- *“More flexibility on location and hours.”*

Focus on transferable skills

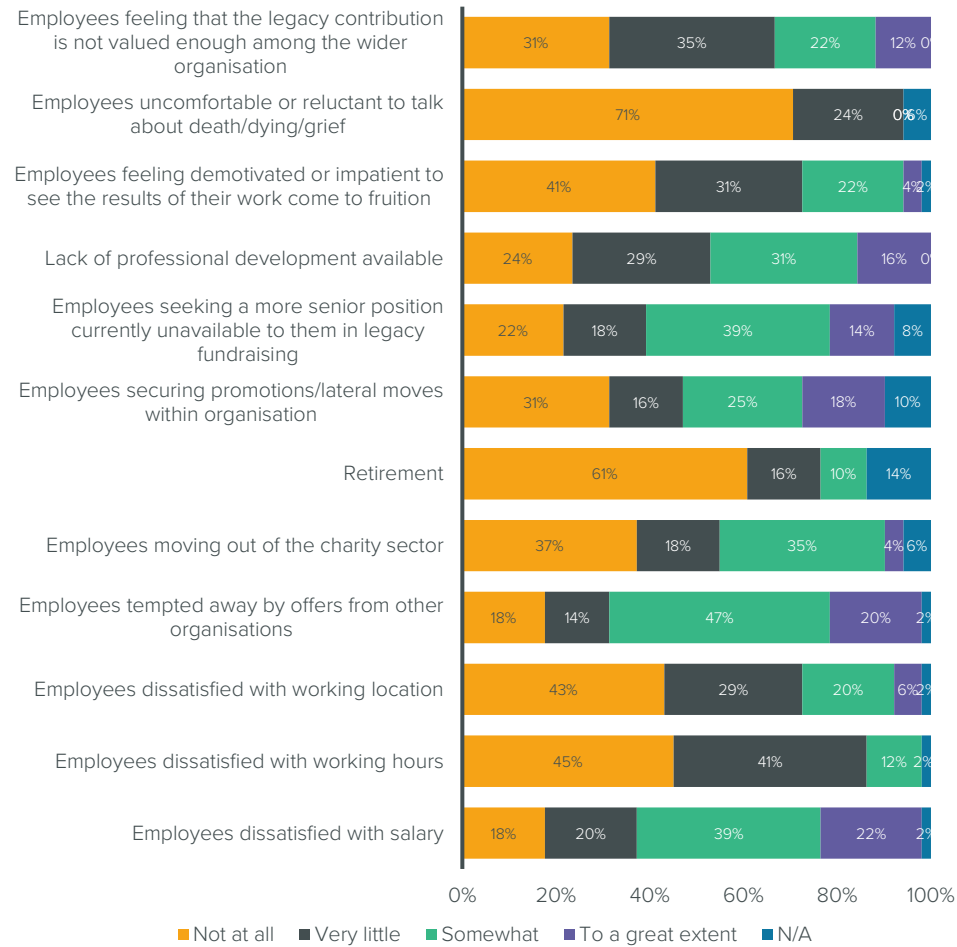
- *“Hiring from Supporter Services but not senior Manager roles which remain elusive! We are limited by a severely under resourced HR team to make needed changes to make working for us more attractive.”*
- *“Looking at different areas outside of charity and fundraising. We have two ex teachers that we have recruited and they have been outstanding.”*
- *“Hiring from other sectors looking for transferable skills.”*

Other

- *“Brand and good sector presence and relationships helps us.”*
- *“Linked in through my personal page as I have broad reach in legacy circles.”*

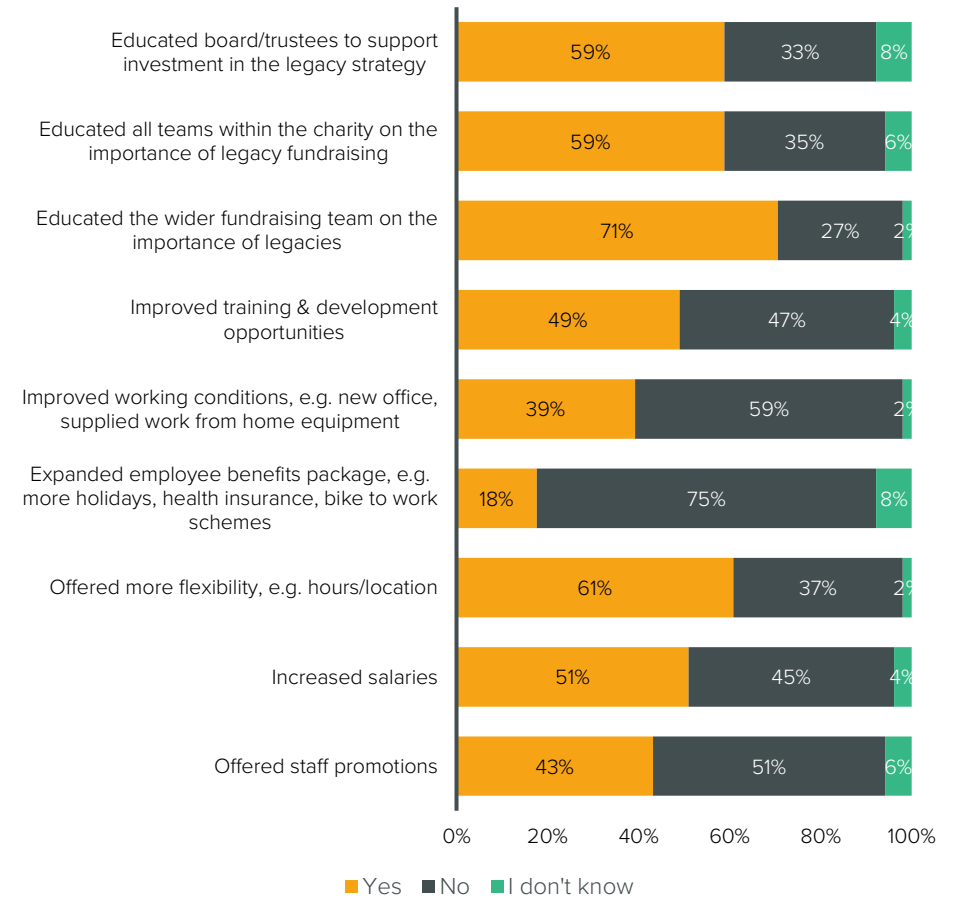
Retention issues charts

Question 7: In the past two years, to what extent have these issues in retaining legacy fundraising employees affected your organisation?



Retention strategies charts

Question 8: In the past two years, has your organisation taken any of the following approaches to try to overcome legacy fundraising employee retention issues?



Question 9: Which approaches above have been the most effective in addressing employee retention issues?

More flexible working

- *“More flexibility and a swanky new head office but the location is off putting. My small team is building a whole new strategy and internal engagement is definitely a priority.”*
- *“Flexibility and promotion of Legacy across the organisation has meant that we have recruited internally.”*
- *“Flexibility, empowerment and importance of legacies.”*
- *“Flexibility in hours and location has balanced out the non increase in salaries.”*
- *“Staff promotions and flexible working.”*
- *“Opportunities for staff promotion and working flexibility.”*
- *“Flexibility, benefits.”*
- *“Able to wfh/allow a move to a different part of the country.”*
- *“Salary and flexibility.”*
- *“Flexibility, educating others.”*
- *“Flex in hours/ wfh, salary increase.”*
- *“Flexible Working.”*

Salary increases

- *“Increasing salaries and employee benefits packages.”*
- *“Recognising the work of employee with salary increase.”*
- *“Increased salaries.”*

- *“salary increase.”*
- *“Promotion / increased salaries.”*
- *“Salary and flexibility.”*
- *“Promotions & salary.”*
- *“Increased salaries.”*
- *“increase salary.”*

Internal education/promotion

- *“Wider understanding in the organisation has helped bring in candidate from a wider internal pool, which is useful in terms of speed of onboarding.”*
- *“Flexibility and promotion of Legacy across the organisation has meant that we have recruited internally.”*
- *“Amplifying the role of legacies within the org so appreciation is shown from outside legacies.”*
- *“Internal promotion of the legacy message. Enabling true home working.”*
- *“Flexibility, empowerment and importance of legacies.”*
- *“Senior buy in to Legacies (educated board/trustees) = increased investment/headcount in the team.”*
- *“I know that an internal candidate, who was successful in her application, had referenced a lot of the information we've put out to the org about Legacies via the intranet etc.”*
- *“Flexibility; educating internally.”*
- *“Internal awareness.”*

- *“Educating wider team about the importance of this role.”*

Promotions

- *“Staff promotions and flexible working.”*
- *“Opportunities for staff promotion and working flexibility.”*
- *“Promotion / increased salaries.”*
- *“Staff promotions - but this has only been a temporary fix. the underlying issue of the value recognised in the organisation needs to be fixed in the long term.”*
- *“Staff promotion.”*

Training & development opportunities

- *“internal & external training & development are high priorities.”*
- *“Internal development opportunities.”*
- *“Development opportunities provided and promotions shared.”*
- *“Providing opportunities to take part or lead certain projects, rewarding (where possible) staff with pay increases based on recognition or performance, offering flexible working and providing extra hours (for P/T roles) where possible. We also offer a selection of L&D courses for all levels of role to help support development.”*

Staff recognition

- *“Recognising the work of employee with salary increase.”*

Expanded employee benefits

- *“Increasing salaries and employee benefits packages.”*
- *“Flexibility, benefits.”*

Culture

- *“Wider understanding in the organisation has helped bring in candidate from a wider internal pool, which is useful in terms of speed of onboarding.”*

Freelance support

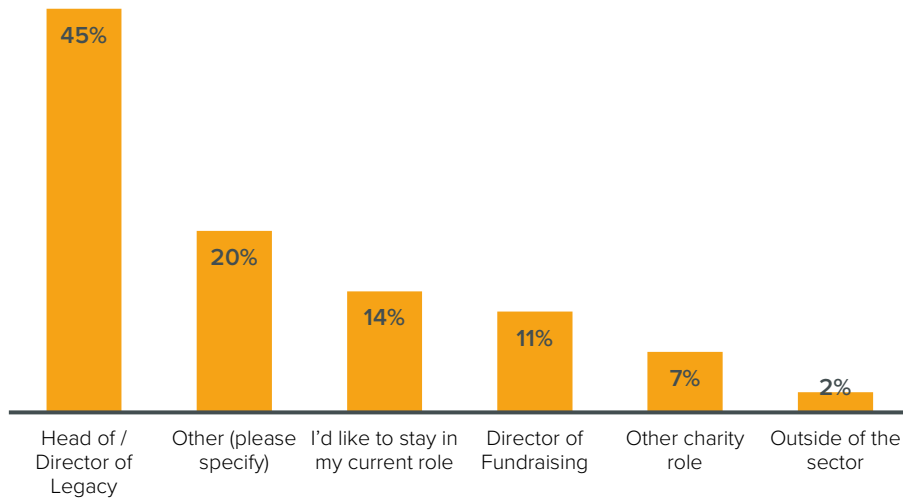
- *“We’re recruiting freelance support to reduce the workload pressure on team members.”*



Respondents' level of seniority

Of the 85% of respondents who were happy to share, 45% indicated that the next step in their career path would be a head of / director of legacy role. Only 1 respondent said their next move would be out of the charity sector.

Question 10 Would you be willing to tell us a little about YOUR career?



Legacy Futures

Legacy Futures is a specialist group of gifts in wills and in-memory giving consultancies, helping over 325 charities worldwide to harness the transformative power of legacy giving.

[Legacyfutures.com](https://legacyfutures.com) | [LinkedIn](#)

Legacy Foresight

Legacy Foresight are legacy and in memory insight specialists. Best known for their market forecasts and research projects, often working with consortiums of charities who join forces to gain greater insight into specific areas of the Legacy and In-Memory markets.

legacyfutures.com/foresight

Legacy Voice

Legacy Voice is a consultancy that helps charities improve their legacy marketing strategies and develop effective communications. Legacy Voice works with charities large and small, UK and international; turning research and insight into deliverable solutions.

legacyfutures.com/voice

Legacy Link

Legacy Link works with over 100 charities each month, supporting them through the whole estate administration process. With a bank of over 30 expert consultants Legacy Link helps to maximise the gifts left to a charity, adding value each step of the way.

legacyfutures.com/link

