



**Legacy  
Futures**

# Hospice Legacy Circle

Proposal

2023/24



# Collaboration in action

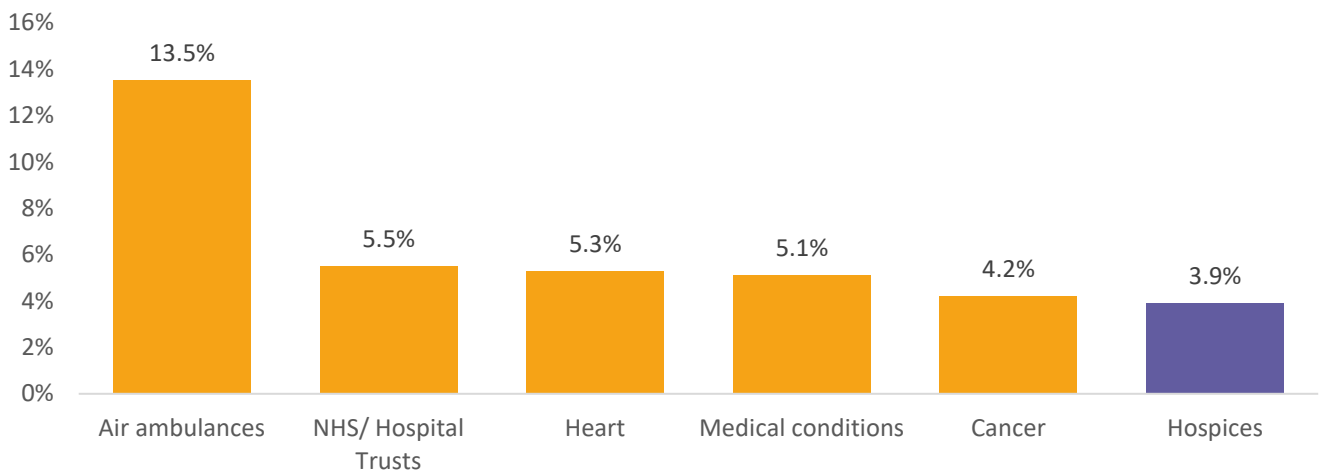
## The Hospice Legacy Circle

Against a backdrop of decline in other income streams, our research shows that legacy giving is set to grow significantly over the next 10 years. But at the same time, the market is becoming increasingly competitive, with many more national and local charities targeting your potential legacy donors.

Across the hospice sector, gifts in wills accounted for 36% of combined fundraised income (i.e., donations and legacies). This proportion is high compared to the wider legacy sector (26%). The high share that legacy income represents reflects supporters' innate inclination to give to your cause area; a mixture of gratitude for care received and loyalty to 'local heroes'. However, it also means you are more dependent on legacy income than other cause areas.

All these factors mean that it is more important than ever that hospices actively promote their need for legacies to their supporters and across the communities they serve.

### Underlying income growth, % p.a., 2010/11-2020/21



Now in its third 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 of class training in legacy fundraising and administration, expert technical advice and valuable market intelligence. It provides a forum to share experiences and ideas through facilitated online workshops, as well as the opportunity to collaborate on common initiatives such as our unique benchmarking research.

The programme is based on a paid for yearly membership starting in November.

**Annual cost:** £2,200 + VAT

**Deadline for joining:** 20th October 2023

# What you get when you join the Hospice Legacy Circle

## Online workshops

- The Hospice Legacy Circle kicks off with an online presentation to introduce this year's benchmarking as well as an update on the latest legacy market trends and forecasts, and crucially what they mean for hospices.
- 3 further online workshops offering tailor-made tools and advice on legacy marketing, administration, and forecasting (see the box below) with tangible learning and 'how to guides' following each session. Sessions will be 2.5 hours long, including presentations from the Legacy Futures team, case studies from Hospices and related sectors, and time for group discussion.
- Bringing it altogether – a final workshop to include; analysis of this year's benchmarking, lessons learned from the workshops, themes for next year and actions to take away

## Benchmarking

- Our interactive data dashboards allow you to understand the legacy market overall, examine patterns in your own performance and compare these to other hospices individually, regionally, by type, or to the hospice sector overall. The air ambulance and NHS/hospital trust sectors are also included for comparison.
- Hospice members will be asked to submit a confidential survey to give us a better understanding of your current legacy income and your legacy marketing investment. We will use this data to share anonymised, aggregated results to the consortium, to help you better benchmark yourself amongst your Hospice peers.

## Individual support

- An individual evaluation on your website's legacy pages, together with a tailored report on how to optimise it for better engagement
- Individual online coaching for each Hospice member to make sure you are getting the most value out of your Hospice membership

## Wider benefits

- Private online discussion forum to carry on the conversations between workshops
- Repository of presentations and data in a secure client area
- A discount on joining our [In-Memory Insight](#) consortium.

## New outputs for 2023

### Website review

- Evaluation on member legacy web pages and an individual report highlighting areas for improvement

### Legacy data benchmarking

- Where available, hospices will submit their legacy data including; income, values, notifications and key marketing data to benchmark against the Hospice Circle members and wider sector

# Example menu of workshop themes

(To be agreed with Hospice Legacy Circle)

## Strategy

- Internal engagement: How to engage non legacy staff with the legacy conversation
- Identifying and soliciting high value legacy gifts
- Promoting in-memory as part of a legacy strategy

## Communications

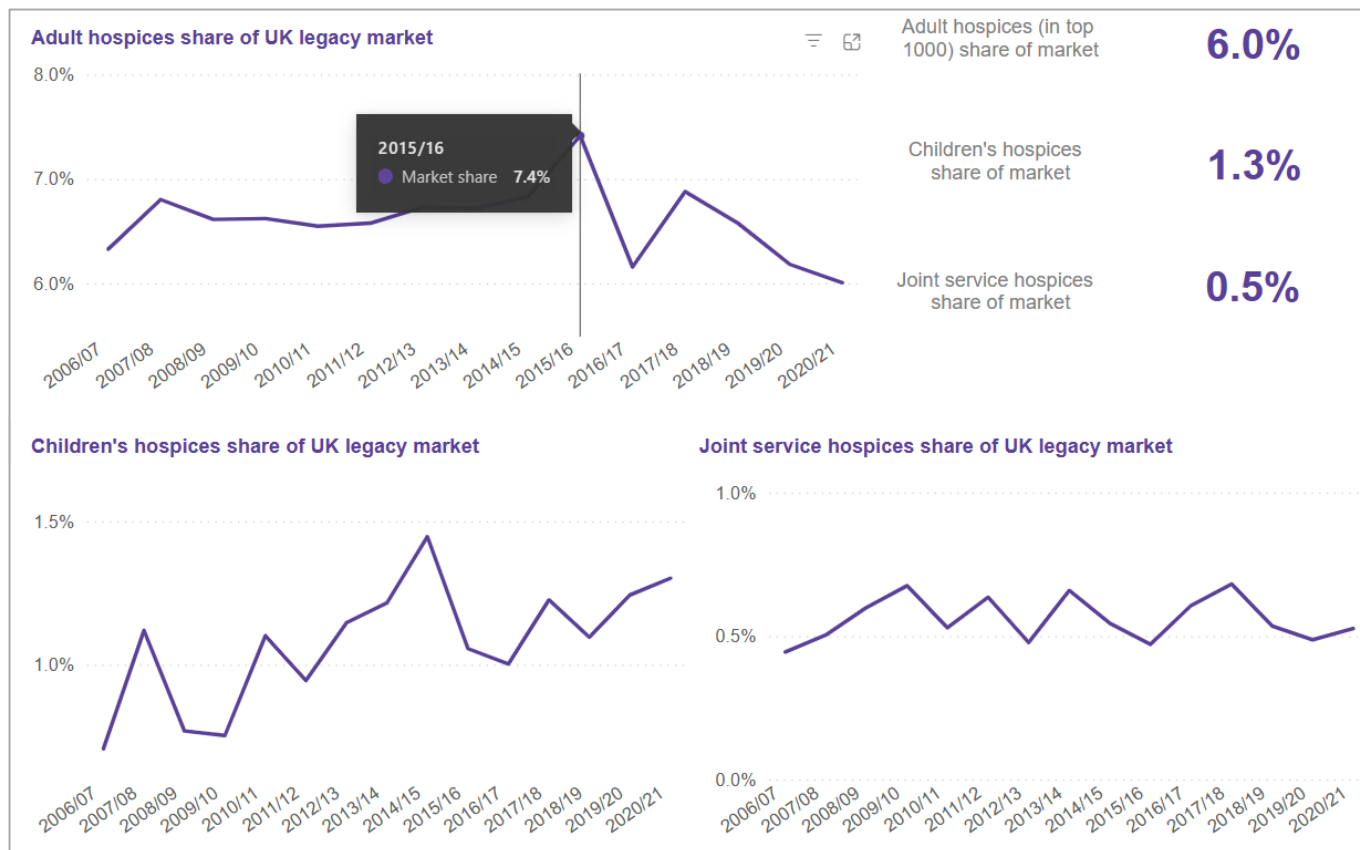
- How to optimise your legacy web pages to encourage engagement
- A practical guide to legacy marketing:
  - Launching a successful TV legacy campaign
  - Utilising telemarketing to encourage legacy conversations
  - Making legacy events work
- Stewarding legacy supporters from consideration to action

## Procedures

- Understanding contested and contentious wills and how to navigate these
- Adding value to legacy income through best practice in legacy administration

# Hospice Legacy Circle benchmarking





The hospice benchmarking aims to provide members with information about their legacy market and their performance within it. Insight is drawn from the NCVO top 1000 charities as well as members legacy income and bequest data. Analysis on the members Legacy marketing spend and activities will add further insight.

### Access to three online dashboards within the client area:

- Top 1000 charity dashboard – Benchmark each hospices legacy income performance against their peers, their sector, and the overall market.
- Benchmarking dashboard – compare specific charities with your peers / sector /top 1000
- Market dashboard – View Market income, deaths, economy, market outlook

### Collection of annual hospice income and bequest data (split by residual / pecuniary / other)

- Final workshop – benchmarking review
- Key messages
- Key trends in the hospice data (and top 1,000 data)
- Market trends and drivers
- Market outlook
- Legacy benchmarking spend, types of activities and results

### Data collection

- Collection of annual income and bequest data (split by residual / pecuniary / other)
- Collection of marketing spend and activities
- Data to be collected via a simple online form to ensure consistency and efficiency
- Data spec sheet will be sent out following confirmation of joining the programme

## What our members say about the Hospice Legacy Circle



We started reviewing our legacy journey with our board of trustees a matter of weeks before the legacy circle group started, very fortuitous timing. As a hospice we know the importance of legacies - receiving an average of £800,000 a year in gifts in wills.

We really want to invest and improve how we talk about legacies in a confident and competent way. To get the buy-in from the board for investment we handpicked 2 trustees from our board to be part of the journey. They helped me research with qualitative and quantitative feedback on the range of messaging and figures out there. Our business case received a significant boost to our budget and received full buy in from the board.

It's been fascinating within the circle to hear from other hospices and experts, we're now armed and tooled up with lots more information to go forward and launch our appeal.

We are going to go back and thank our long-term supporters – and find out why they still supporters, to help with future messaging and future donor care.

**Teresa Nightingale**

**Income Generation and Marketing Director  
Wirral Hospice St Johns**



Over the last couple of years, legacies have been a significant part of our voluntary income and we know this income stream will play an important part in our future. We started with the Hospice Legacy Circle group to coincide with homing in our focus on this area of income.

Each session has been insightful and it's great that there's a particular topic for discussion each time the group has met. What we've found particularly helpful is the balance between sector insight and expertise offered by the Legacy Futures team, coupled with practical examples and knowledge from the participating hospices.

The data shared on our sectors legacy trends and the dashboards that the team have developed have been invaluable and have supported our business case for increasing investment in this area of fundraising.

**Janet Abraham**

**Head of fundraising  
Claire house Children's Hospice**



It's been really helpful throughout the whole Legacy Circle Programme to hear from other hospices and learn from them.

We've been looking at our material and legacy booklets. We took up the Hospice Circle offer to have our legacy booklet reviewed – it was great to hear what should be changed but also great to have the validation of what we were doing well. As a result of that review that we've re-written our gifts in wills booklet.

We also took up to offer to look through our website - to ensure the wording and imagery has that joined up thinking. We also took the opportunity to look at our executor correspondence to see how we engage with our supporters. Previously we communicated through the solicitor but now we enclose a letter of thanks to the next of kin via the solicitor and we offer them a stone as our remembrance pathway – to build that relationship with the next of kin.

We found the session on engaging with hospice staff very helpful. We're looking at developing a survey for those in clinical and non-clinical roles to help empower them to talk about gifts in wills in the long-term.

We also took advantage of the help desk service to answer a difficult question that was coming from an executor about apportioning income tax.

**David Pond**  
**Individual Giving Manager**  
**Keech Hospice Care**

## Our team

The Hospice Legacy Circle is convened by Legacy Futures in collaboration with db associates.

To find out more, contact us:



**Richard Hill**  
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**David Burland**  
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# Legacy Futures

Legacy Futures is a specialist group of gifts in wills and in-memory giving consultancies, helping over 200 charities worldwide to harness the transformative power of legacy giving.

[Legacyfutures.com](https://legacyfutures.com) | [@talkinglegacies](https://www.instagram.com/talkinglegacies)

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## 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.

[legacyforesight.co.uk](https://legacyforesight.co.uk)

## 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.

[legacyvoice.co.uk](https://legacyvoice.co.uk)

## 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.

[legacy-link.co.uk](https://legacy-link.co.uk)

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## db associates

David Burland has extensive experience in the hospice movement having worked in both adults and children's services and on a national level. His first hospice role was as Marketing Director at Princess Alice Hospice, where he doubled voluntary income. launched their lottery and instigated a legacy marketing campaign. He then worked at Help the Hospices, initially as Director of Fundraising, later becoming Chief Operating Officer and then Deputy CEO.

In 2012 David became CEO of Shooting Star Chase, formed from the merger of two children's hospices. During his time there both of the charity's hospices were awarded 'Outstanding' CQC accreditation. The charity's 'Friendlies' re-brand also won 'Charity Brand of the Year' in the Third Sector awards.

Since setting up db associates in 2017, David has worked with over 25 different charities on a range of projects, including income generation and fundraising reviews for a number of hospices, as well as serving in interim roles at St John's Hospice and Alexander Devine Children's Hospice.