

Include a Charity Week 2022

September 2022



INCLUDE
A CHARITY



Fundraising
Institute
Australia

Question.

On a scale of 1 to 10 how confident are you that your organisation as a whole gets & integrates legacies

The audience is getting older, and there are many more of them over the next **30 years** as the **death rate increases**

There is a demographic revolution taking place. After the second world war, the birth rate exploded - the Baby Boomers arrived. Born between 1946 and 1963, the first are turning 70. They changed everything through their lives, and they will change old age.

For the first time in history, people age 65 and over will outnumber children under age 5



1

This is the wealthiest generation in human history

Some reports say baby boomer wealth in the US alone is worth \$64 Trillion. Across the western world, this rich generation will be handing on this wealth one the next 30 years. Its an unprecedented moment.

Wealth exists in cash, property, possessions and land. It exists in business. We recognise that there are challenges to where this wealth goes or is needed. Much will be handed on to family. But this generations wealth can be used to some amazing things. A small share is a huge bonus one the next 30 to 50 years.

2



Technology and media are making them **accessible, open & reachable**

Internet use among those 65 and older grew 150 percent between 2009 and 2011, the largest growth in a demographic group. Furthermore, their 2012 study showed that of those that go online, 71 percent do so daily and 34 percent use social media.

We now have amazing examples all over the world of integrated campaigns about legacies that use TV, print and digital. Access to this technology allows us to connect directly. It a huge and growing opportunity.



They are increasingly motivated to do good & make their mark on earth

This is the generation that changed so much. The charities we support are largely bank rolled by baby boomers and civics.

As they age they are seeking what is now called and understood to be Symbolic Immortality. The powerful opportunity to live in and do good.

Gifts in wills are a way to meet this strong human emotion.

4



We are learning about behaviour in a way that can meet the donor on their terms so they can take action and leave a gift

We now have a wealth of understanding and experience on behaviour change. This has transformed legacy marketing and messaging. It has provided real insight into the barriers and opportunities we have and taught us ways to understand where our audience is coming from and how we can not only reach them but inspire and motivate them.

5

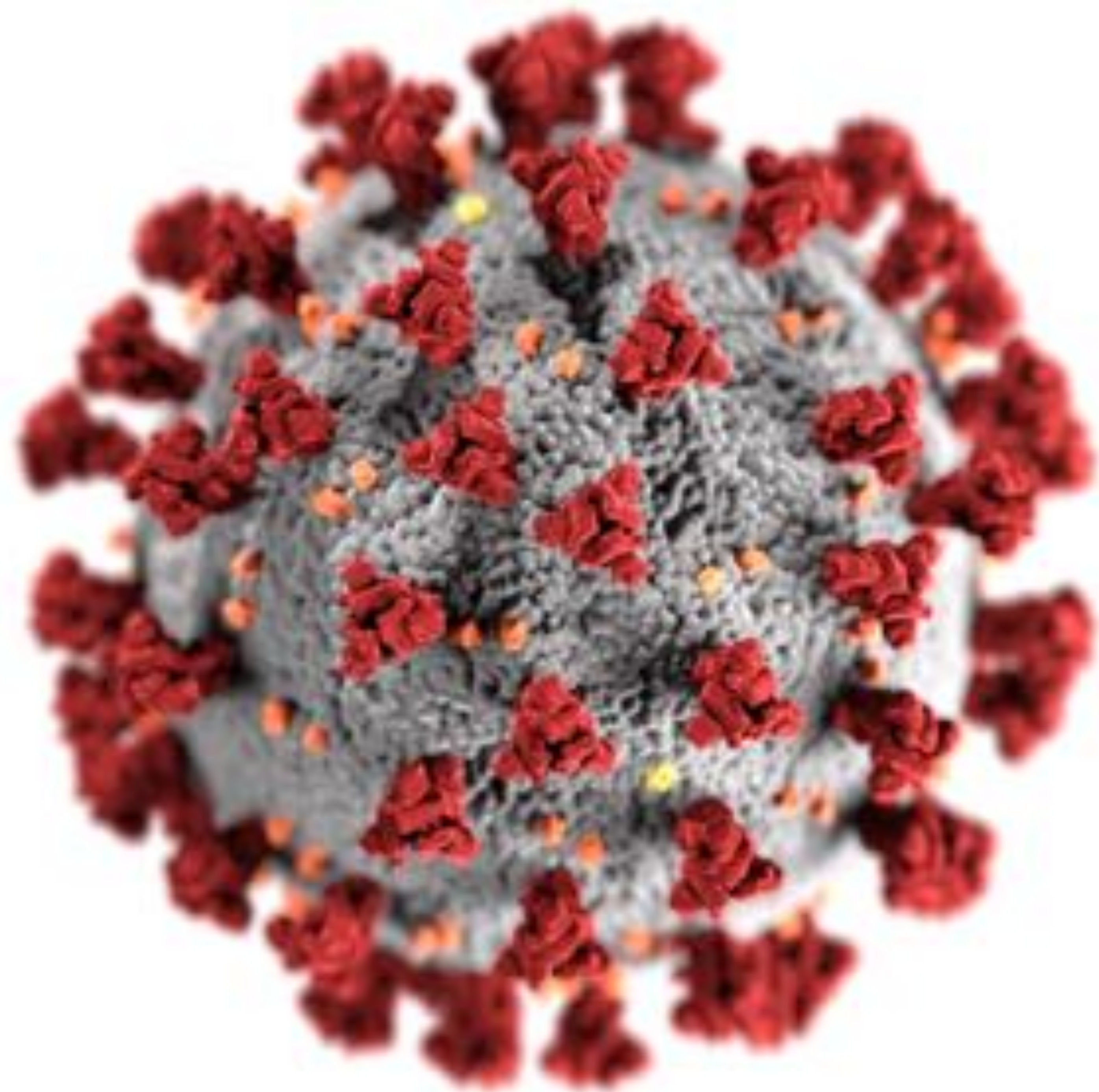


More people are leaving gifts, and fundraising is getting smarter, more competitive & active

Because of the large number of charity legacy activity out there (although we are nowhere near where we should be!!) and the way supporters are learning we are seeing more and more gifts. UK giving has increased as well as attitudes. In 2007 35% of the UK population said they would consider a gift in their will after family - its now 40%.

6





Gift in your Will = Legacy

Make a gift to charity in my will

23%

Make a bequest gift to charity

12%

“A good scientist will acknowledge that more than 50% of scientific breakthroughs are reached through post rationalised ideas, not through sequential logic”

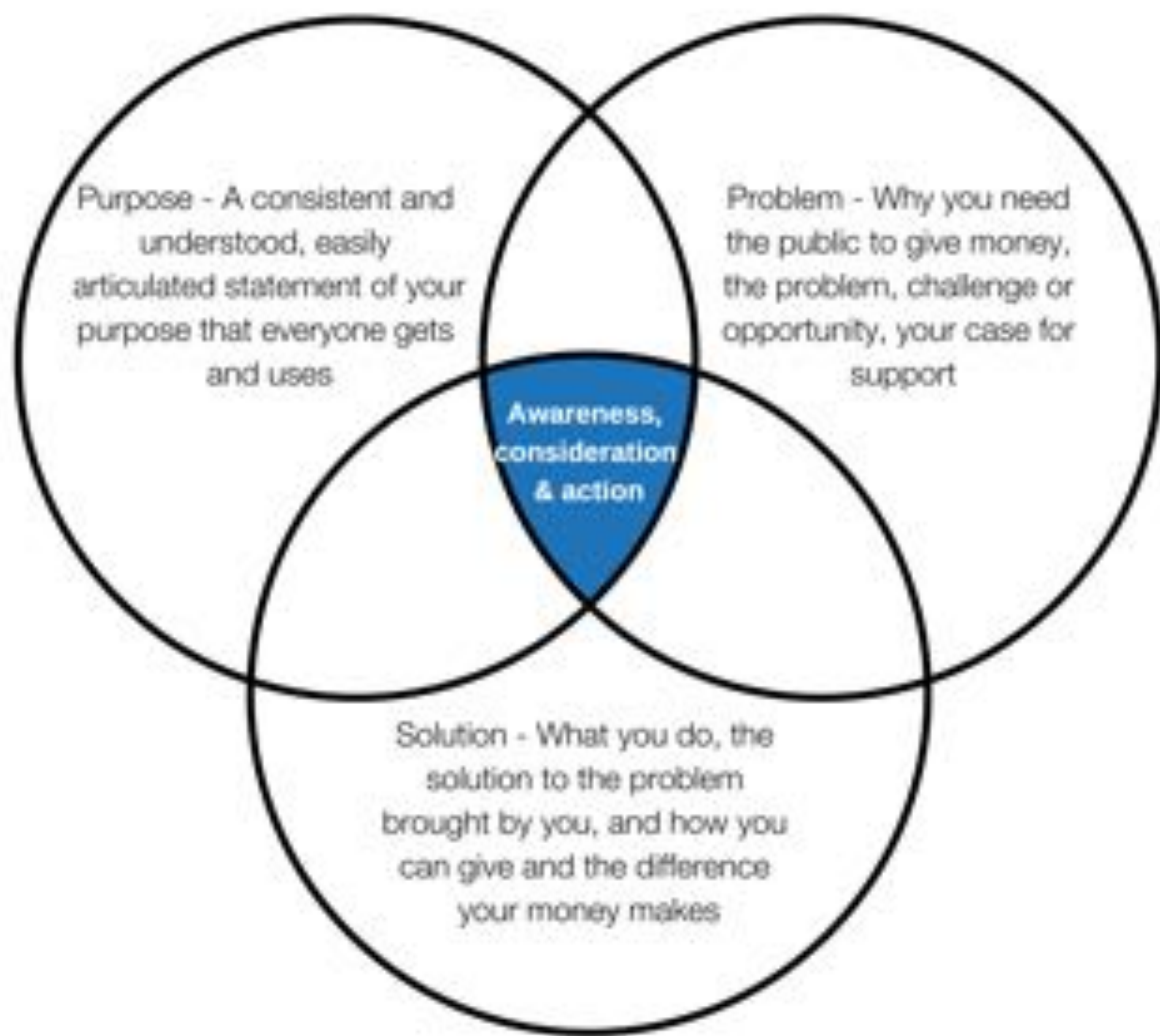
Examples of Non Sense

1. **‘What people want is a really cool vacuum cleaner’ - Dyson**
2. **‘...and the best part of all this, is that people will write the entire thing for free’ - Wikipedia**
3. **‘..and people will be forced to choose between three or four items’ - McDonalds**
4. **‘and best of all, the drink has a taste that consumers hate’ - Red Bull**
5. **‘...and just watch as perfectly sane people pay \$5 for a drink they make at home for almost free’ - Starbucks**

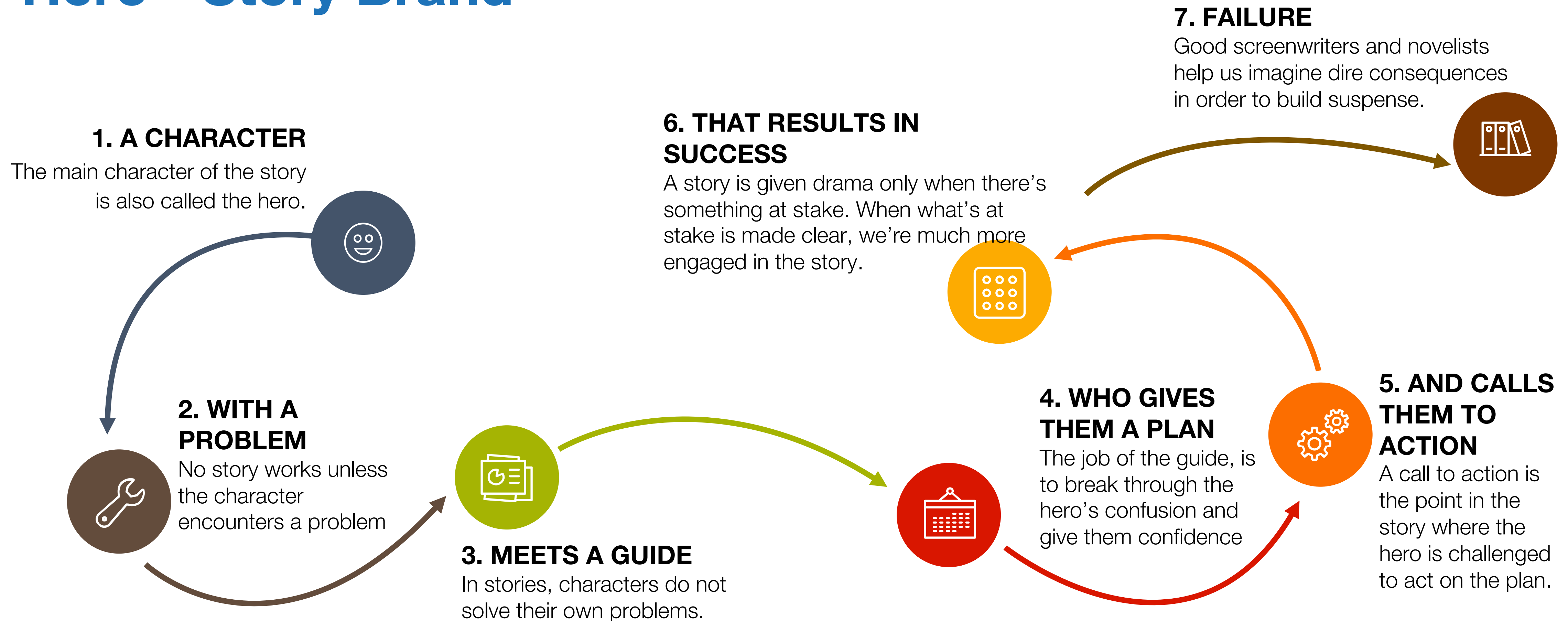


Brand love, experience & connection come first





Your Brand is not the Hero - Story Brand

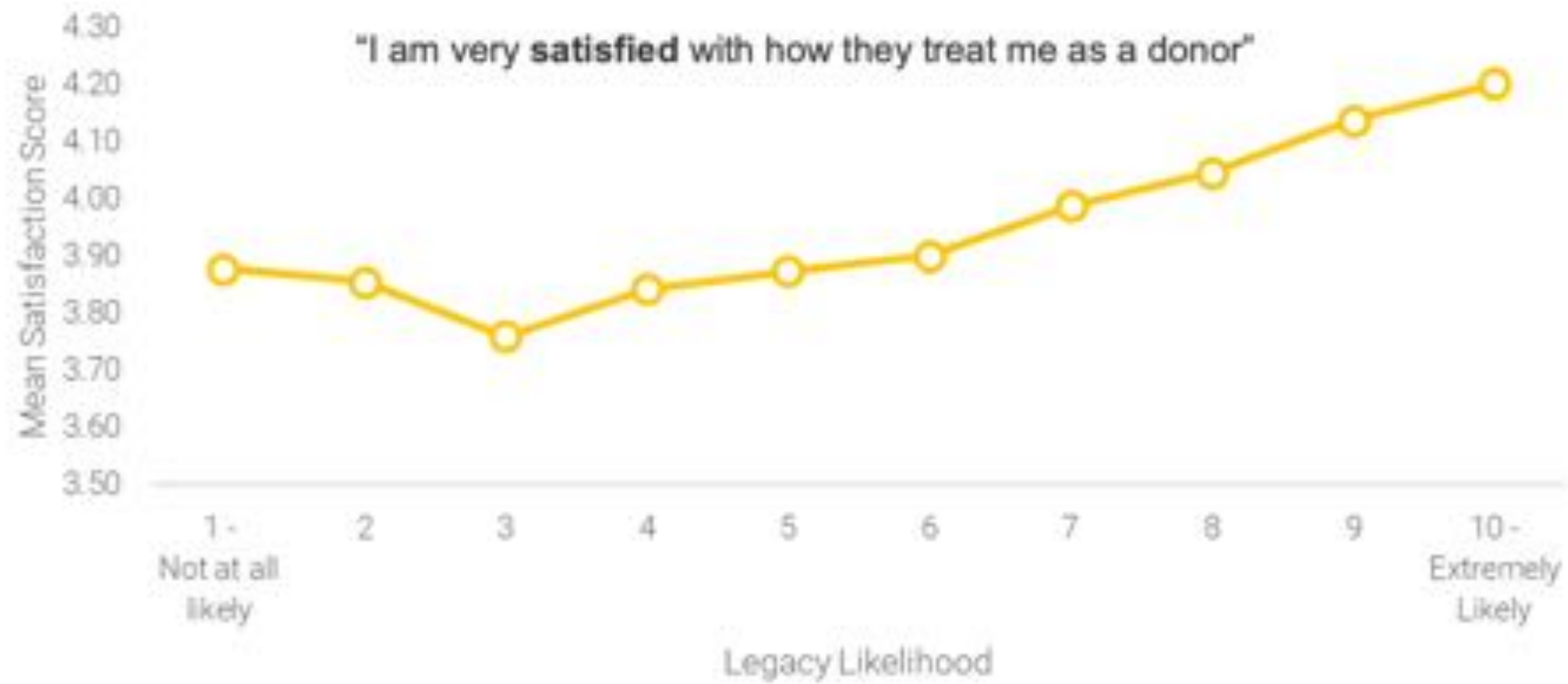


Winning the Zero Moment of Truth - Changing the Rulebook

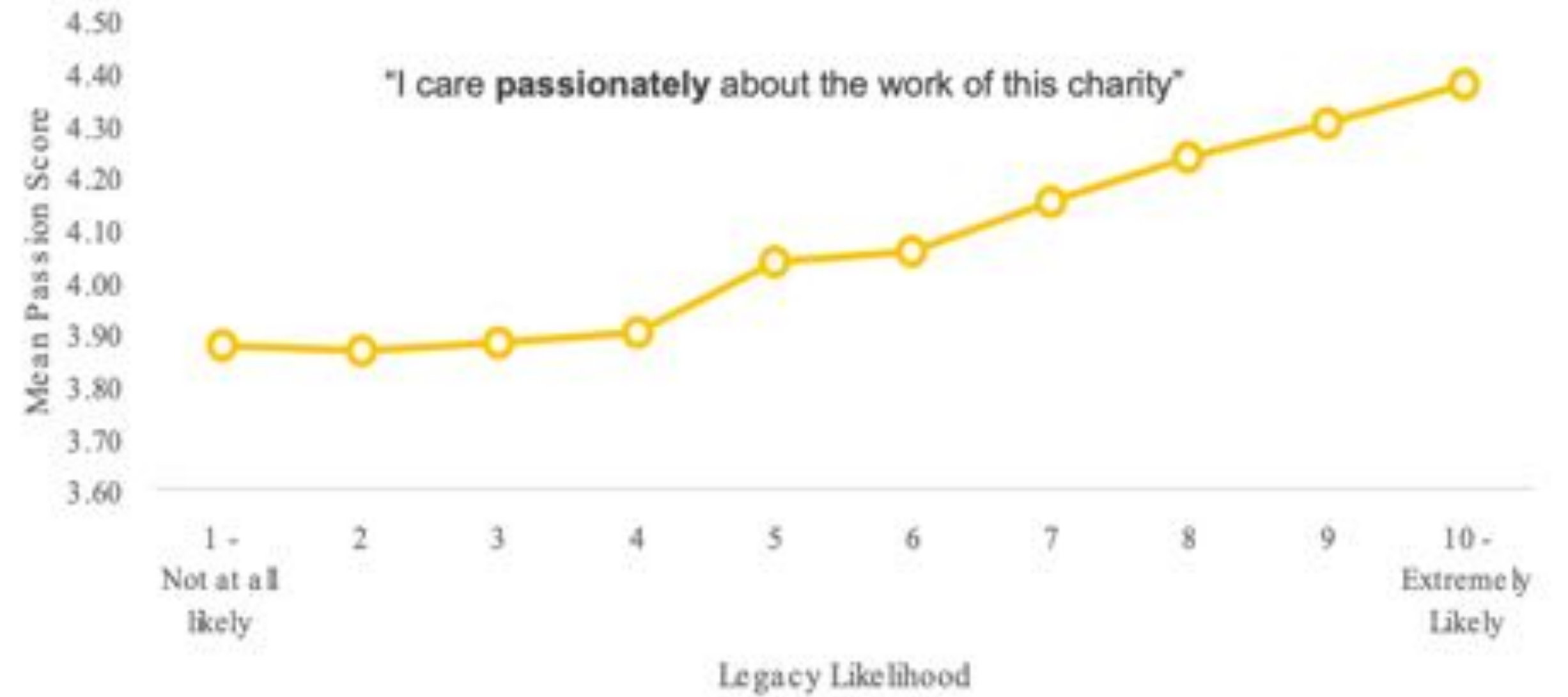
by zeromomentoftruth



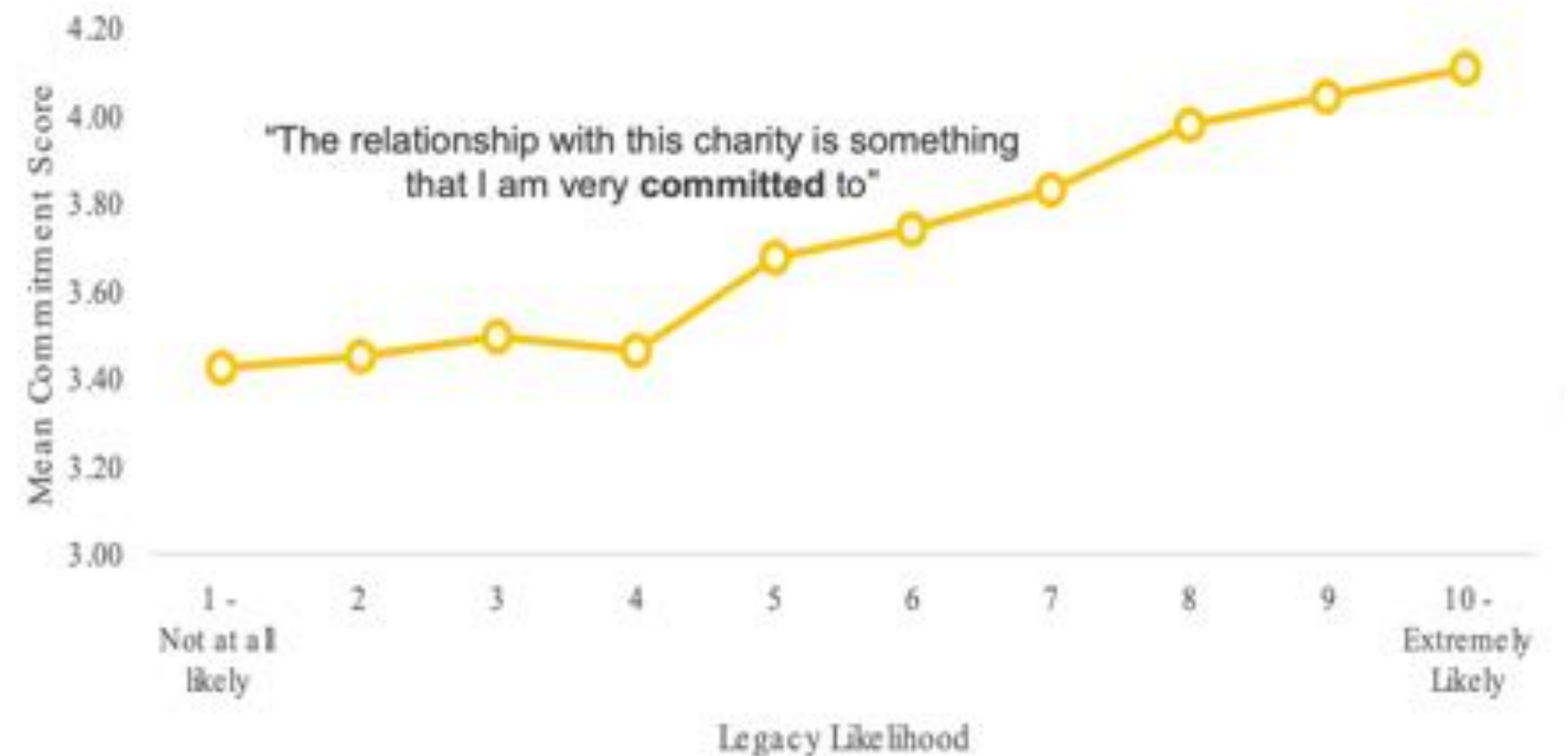
Satisfaction with treatment as donor increases likelihood of leaving a legacy - correlation



Passion and Legacy giving correlation



Commitment & Legacy giving correlation



Reconnect and Recalibrate

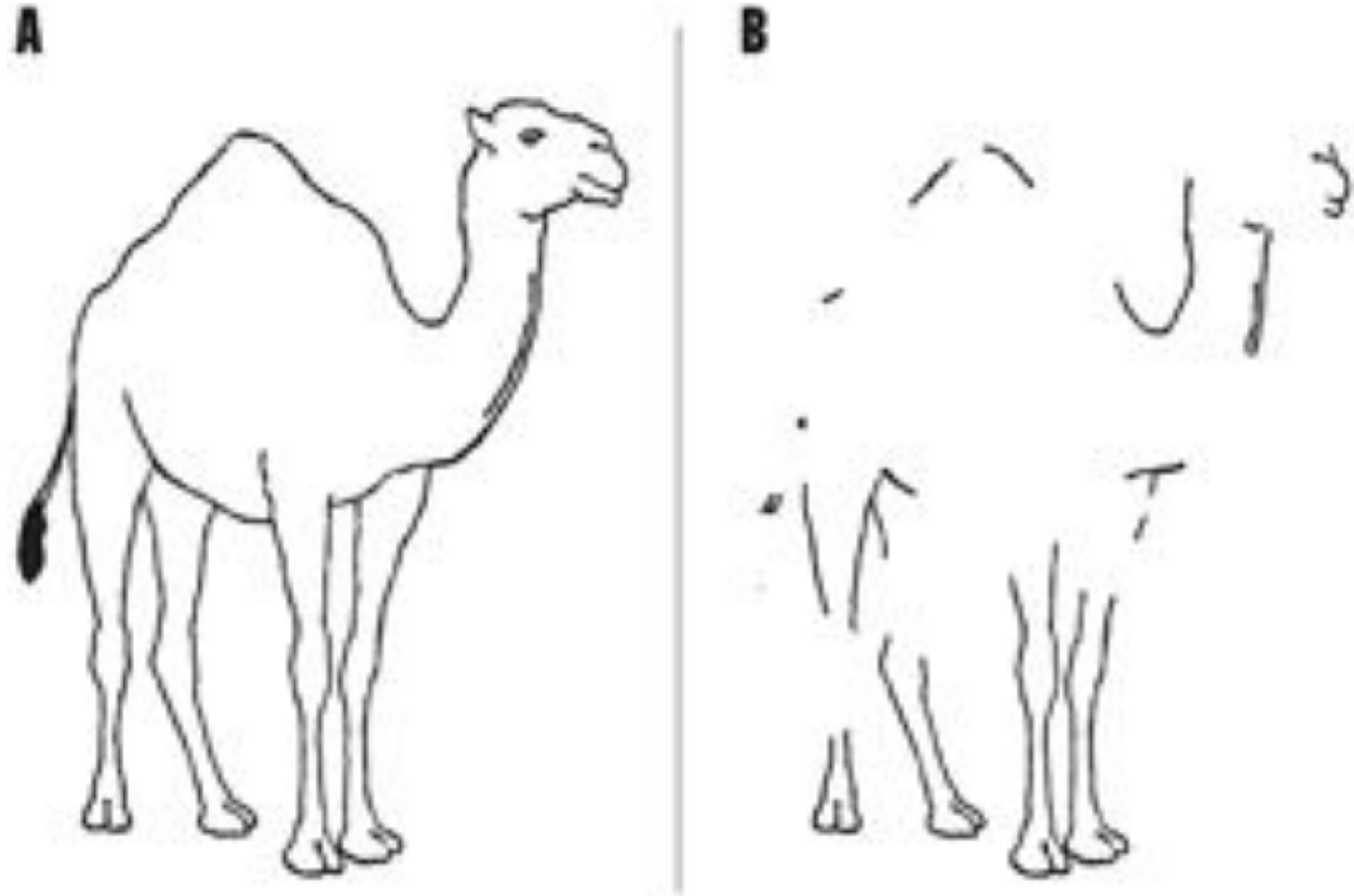
The Legacy response model



The Power of Implicit Memory

In one study, David Mitchell, of Kennesaw State University, showed his subjects images similar to A, multiple times, priming their implicit memory. Later he showed them fragments (similar to B) of the pictures they had originally seen, along with “novel fragments” of pictures they hadn’t. Subjects were far more likely to recognise the images they had seen before than the new ones.

But the follow up was done 17 years after that priming, with some subjects not recalling that they’d taken part in the study. Even years later, people can identify things they’ve encountered before more easily than things they haven’t.



Reconnect with the true meaning & joy of legacy



Irene Handl means her work for the old and lonely to continue for generations to come

I'm not rich, but when I come to the end of my life I would like to know that some of my money was still working to make life better for old people. Too many of them suffer from loneliness and intolerable housing.

Help the Aged flats and day centres bring independence and friendship for years to come to those in great hardship. When a legacy is used for housing its value is multiplied twenty-fold because of flats available. So a modest legacy of £500 builds £10,000 worth of pleasant flat accommodation. A legacy can actually reduce liability for estate duty on large estates, and is free of all duty up to £30,000—providing it is made one year before death.

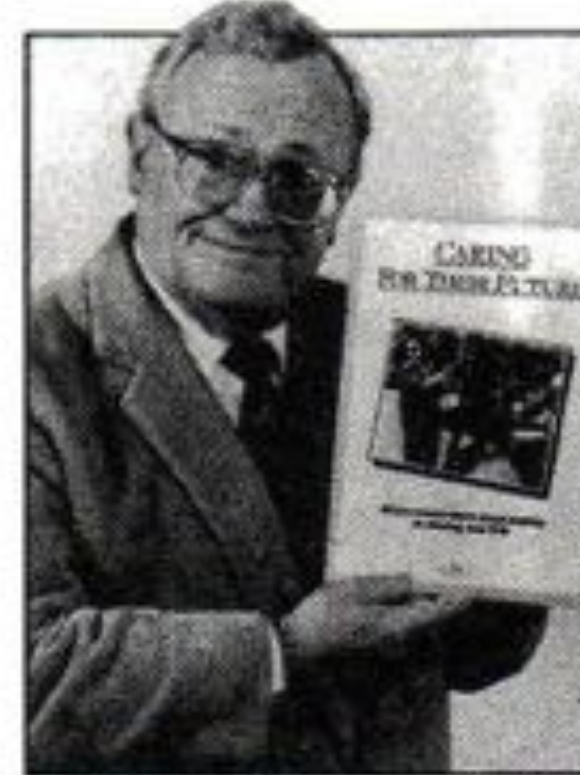
A helpful and interesting new booklet on reducing

WHAT CONSTITUTES AN IDEAL CHARITABLE BEQUEST?

1. IT MUST BE TO A SOCIETY WHOSE PURPOSE IS UNCHANGING.
The one purpose of the Bible Society is to circulate the Scriptures without note or comment.
2. IT MUST BE TO A SOCIETY WHOSE RECORD IS UNIMPEACHABLE.
The Bible Society has sent out more than 442,000,000 copies of the Scriptures since its foundation in 1804.
3. IT MUST BE TO A SOCIETY WHOSE SCOPE IS SUFFICIENTLY FAR-REACHING.
The Bible Society has broadcast the Scriptures in 674 languages to every part of the world.
4. IT MUST BE TO A SOCIETY WHOSE ACTIVITIES CAN NEVER BECOME UNNECESSARY.
As long as humanity endures it will need the Scriptures, and the Bible Society is pledged to continue its labours for all time in spreading the Word of

HOW TO BE A PROPER GOON

Forget to make a Will



NSPCC

Making a Will is the prepared a helpful free
Only way you can be booklet called *Caring For*
certain your wishes will be *Their Future*. It's simple

Write her future into your will



Her future isn't hopeless. It will be difficult, certainly. But with Oxfam's help in her community, she intends to succeed in breaking the chains of poverty which held her parents captive all their lives. Your legacy to Oxfam will make sure hardworking people all around the world achieve the independence

Have
you
made
your
will?

The opportunity of expressing good-

WHEN YOU COME BACK
AS A WHALE, YOU'LL
BE BLOODY GLAD YOU
PUT GREENPEACE IN
YOUR WILL.



Test your
will
power.

1. Are you going to be remembered for doing something really worthwhile? yes no
2. Will your money go on working for generations to come? yes no
3. Have you decided to help put right some of the terrible injustices of the world? yes no
4. Will you have helped people who have little or nothing to enjoy some of the good things most of us take for granted? yes no

ANY DESTITUTE CHILD
HAS AN IMMEDIATE FRIEND IN DR. BARNARDO'S HOMES

Under the Charter "No destitute child ever without someone" over 115,000 orphaned and abandoned boys and girls have been welcomed into a new life. The Homes' steady welfare are rescued from adverse conditions, given a new environment, nurtured and trained for useful and self-sustaining lives. Over 8,000 children are already being supported in the largest family in the world. On an average 3 come in daily.

Turning C.I. children into A.I. citizens is a work that calls for your practical sympathy.

WILL YOU BECOME A PARTNER IN THIS WORK FOR HELPLESS LITTLE ONES?

10/- will feed one child for a fortnight.

25,000 meals have to be provided every day.

LEGACIES
greatly assist this National work for destitute children.

Cheques, etc., payable to Dr. Barnardo's Homes, and unpaid, should be sent to

**“People do not give to the most urgent needs,
but rather they support causes that mean
something to them”**




The nature of true Legacy

To leave a legacy is a natural human desire. Since the beginning of history, human beings have striven to pass on something of ourselves to future generations. We want to be remembered. We want to leave a mark, make a difference and help our families and loved ones do better. We are wired to leave legacies.

This basic human emotion can be seen every day. This emotion is a powerful motivator for those who give gifts in wills to charities. But despite that depth, the reality is for many countries gifts in wills is not a society wide norm. Its not understood and take up remains small. We need to grow the market.

Legacy is driven by values & emotion

But the truth is that, whilst this is a universal human feeling, for many, it manifests itself in more humble origins. Heirlooms, prized possessions and letters may be the sum of much of our worth – our assets and value. In a survey conducted by the **UK Campaign Remember a Charity** over a quarter (28%) of the British public value the wisdom that loved ones have passed on more than they do money, keepsakes or property. There are many who see themselves as having nothing of worth to pass on to the next generation. Many make no provision. But the emotional drive remains, even if the practical action does not.



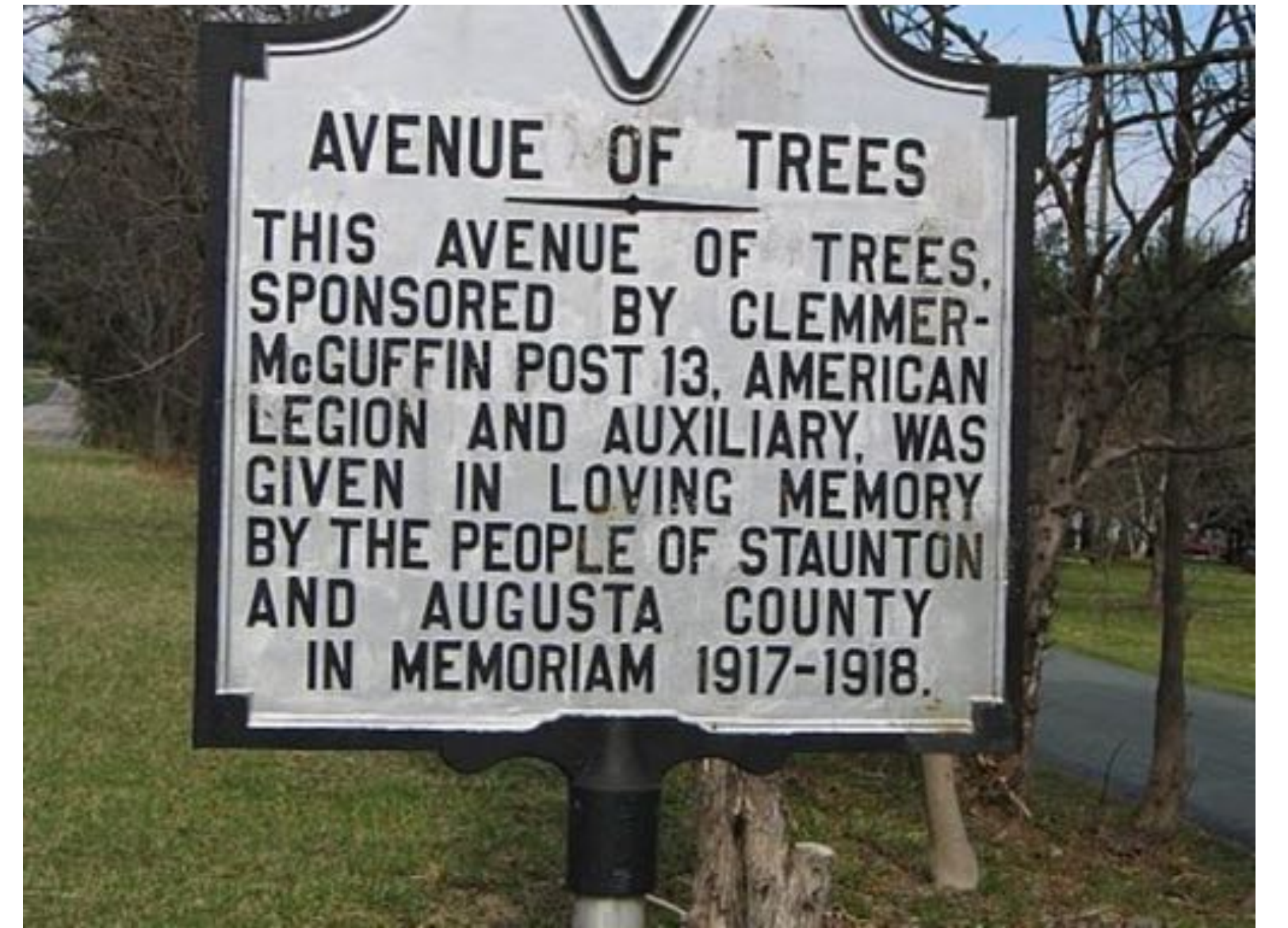
The Journey
of a thousand
miles begins
with a single
step.

-Lao Tzu

Legacy is a gift - the way is a will

The act of giving through a will is ancient and equally universal. It goes back a long way. **Redmond Mullin, in Foundations for Fundraising**, describes an appeal for Troyes Cathedral that received approximately 4% of income from legacies between 1389 and 1423 (**Foundations for Fundraising – Redmond Mullin 1995**). Legacies are a trusted and time-honoured way to give. As wealth has grown and spread to the many and not just the few, the act of giving via a will became more widespread. Many of our great institutions are here because of gifts in wills





**Leave the woodpile a little higher
than you left it**



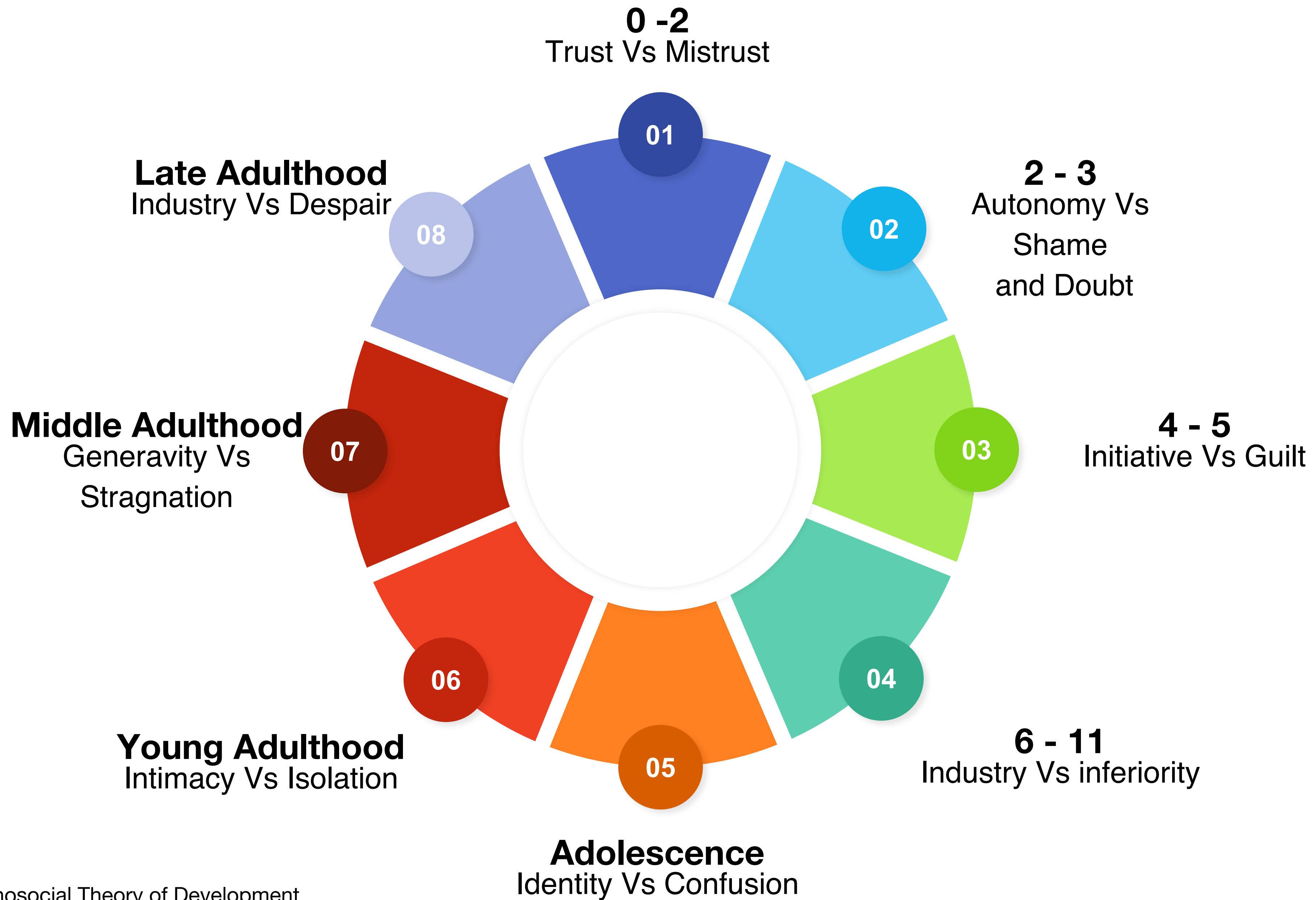
**“What must I do to
be at peace with
myself so that I may
live presently &
die gracefully”**

Alua Arthur - Founder, Death Doula





Symbolic Immortality



Major Question - Did I live a meaningful life?

Basic Virtue - Wisdom

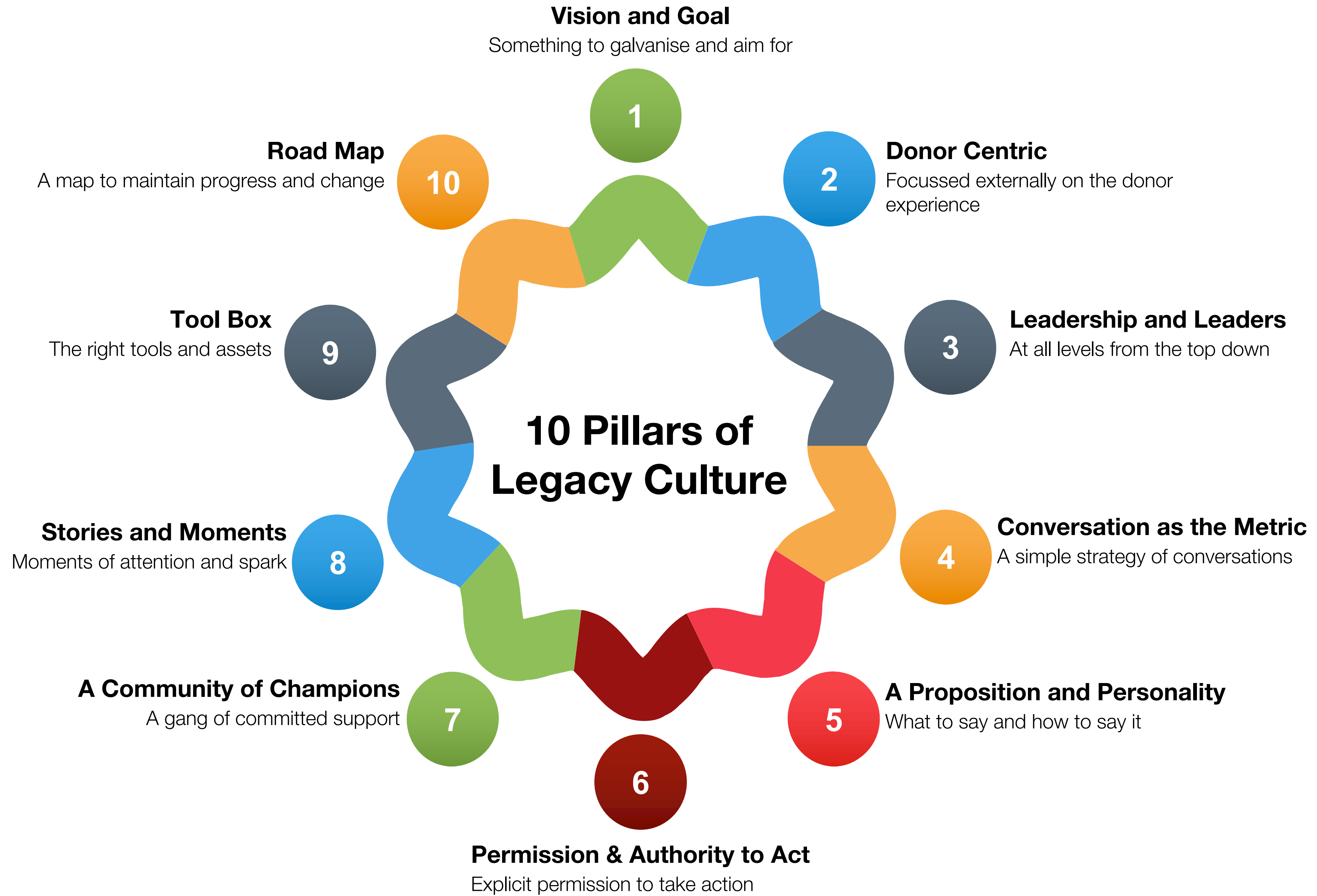
Important Events - Reflecting back on life

Create your own context & atmosphere

Examples of Context

- 1. Pernod tastes better in France. Guinness In Ireland. Rose by the sea**
- 2. Happy weddings have happy people**
- 3. Wine in Restaurants add quality (and mark up)**
- 4. Maserati cars aren't sold in car showrooms - they are sold in Yacht and Plane shows**
- 5. We feel our cars drive better after a car wash**

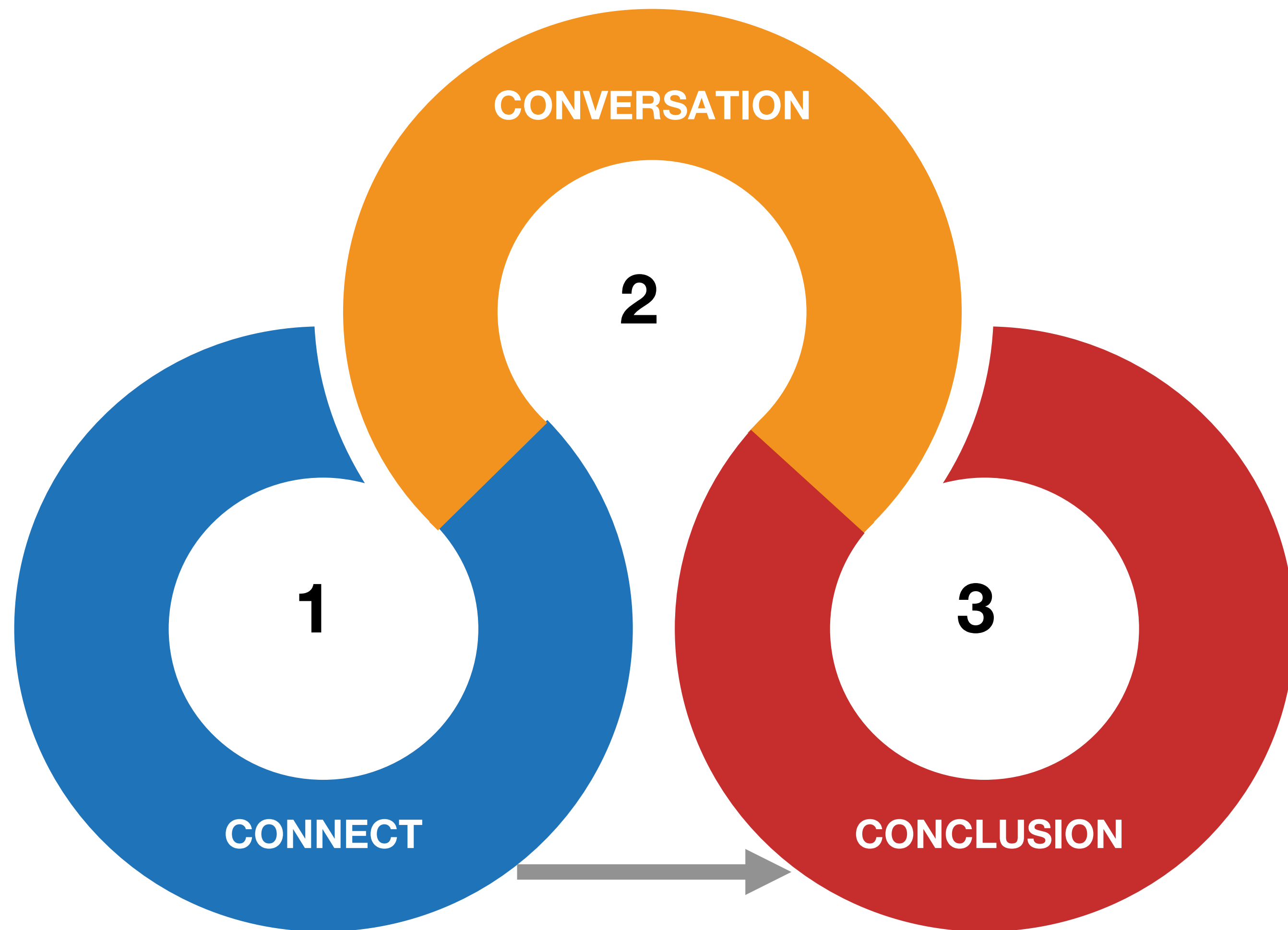
**Content, Stories &
Moments means you
can scale and reach**



**Re-engineer what you
expect, measure &
celebrate**

Question.

**What do you expect and
measure in your legacy
programme**



**Using the 3 cycles to
together in **this Legacy
model****

4 Legacy Groups in the Invisible Legacy Audience



Disclosed legacy gifts (22%) come from involved current supporters who often feel proud about their bequest

Undisclosed legacy gifts (47%) come from current supporters who are less 'hands-on' but remarkably similar in their profile to the current supporters who have disclosed a legacy. They mainly have a different attitude to disclosure

Unrecognised legacy gifts (28%) often come from former service users (or their relatives/friends) who have lost contact with their charity. Their lack of regular contact does not automatically mean they feel less strongly about their legacy

Unknown legacy gifts (4%) are highly likely to come from childless people who feel that charities need or deserve their money more than their relatives. They often have no direct relationship, but the charity they support has long formed a backdrop to their lives.

Collaborate and innovate or get missed

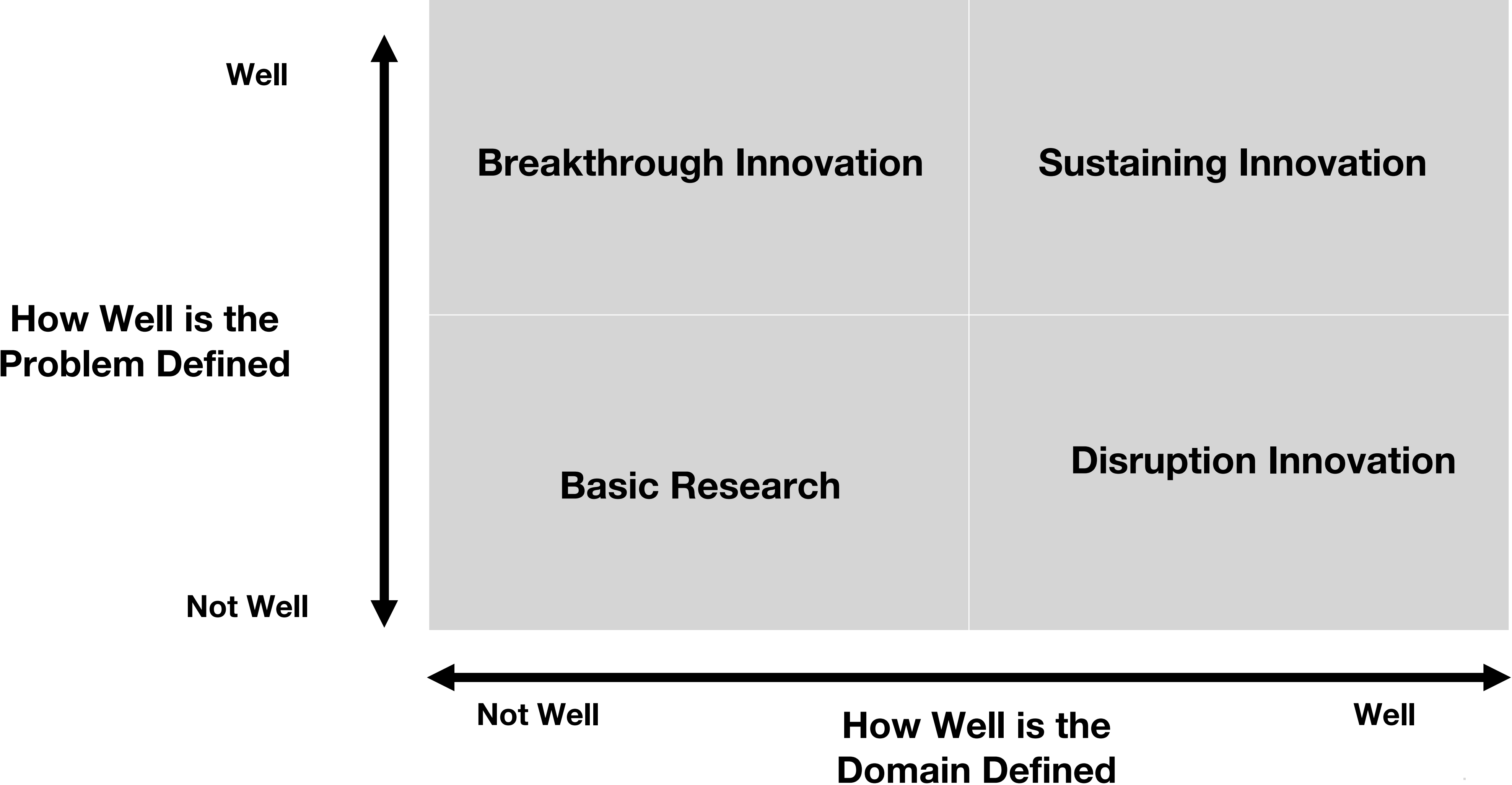
**BLOCKBUSTER
VIDEO**

**BLOCKBUSTER
VIDEO**

BLOCKBUSTER VIDEO



4 Types of Innovation



“Engineers, medical people, scientific people, have an obsession with solving the problems of reality, when actually ... once you reach a basic level of wealth in society, most problems are actually problems of perception”

Challenge To Reinvent in Line with the Supporter

- 1. Brand love, experience & connection come**
- 2. Reconnect with the true meaning & joy of legacy**
- 3. Create your own context & atmosphere**
- 4. Re-engineer what you expect, measure & celebrate**
- 5. Collaborate and innovate or get missed**

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FIA

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