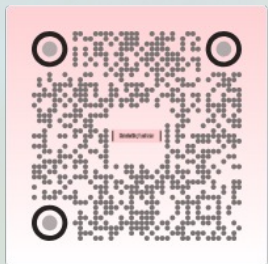


# The Currency of Trust: How Impact Reporting Can Build Donor Trust

Ligia Peña, CFRE  
International Legacy Consultant  
[GlobetrottingFundraiser](#)



*Scan me*



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# *Ligia Peña, CFRE*

Consultant & Coach:

- Super power: build solid foundations that allow legacies to flourish.
- Passion for data-driven fundraising.
- Built fundraising and legacy programs from scratch at countless organizations.
- Grown fundraising programs in small, medium and large organizations.
- Ph.D. candidate at the University of Kent.



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# *Warm Up*

***Why should I trust your  
charity with my life's work?***



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Gifts in will are unlike any other donation. They're not just cheques in the post; they are a donor's final moral statement about what mattered to them in life.

If we don't demonstrate that we're trustworthy — today and into the future — donors won't take that leap of faith.

Source: Boenigk & Helmig, 2013; Silber, 2009

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# Defining Trust

Defining trust for gifts in wills is more complex. Donors aren't buying a product today. They're making a promise that might not be realised for decades. That means they need **future-oriented trust**: confidence that your organisation will be here in 20, 30, even 40 years, still standing by the mission they value.



## Not A Transaction

Gifts in wills are expressions of identity expressions. They say: *'This is who I am, and I trust you to carry that forward'*.



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# *Why Trust Matters*

Trust has two dimensions:  
competence and integrity.

We can forgive mistakes  
of competence.

Mistakes of integrity  
are harder to overcome.



Source: [Simon Sinek](#)

# Why Trust Matters



Think of your most loyal donor. What would make them believe you'll still be trustworthy in 20 years?

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# *Why Trust Matters*



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# *The Australian Context*

Around 58% of adults have a will, but fewer than 8% include a charitable gift in will.  
(Wiepking et al., 2010; Baker, 2007).

Charitable GiW make up about 20% of fundraising income in Australia.  
(Legacy Foresight, 2019).

Why do you think there's such a gap?



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# *The Australian Context*

Most charities never ask the question, or they do it poorly.



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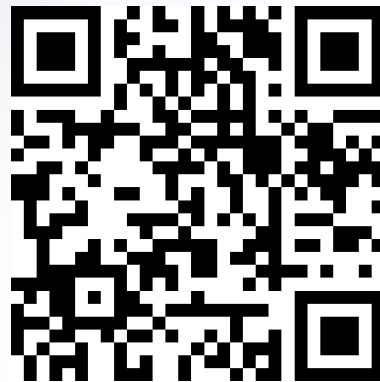
# *The Australian Context*

The triggers are very predictable: writing or rewriting a will, no close heirs, and a strong belief that the organisation is effective and well-managed

(Madden & Scaife, 2008; Baker, 2007).

Poll:

*What percentage of your donors do you think have left you in their will?*



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# *Donor Expectations*

What do donors expect from us?

- Excellent reputation.
- Well-managed organisations.
- And most importantly, evidence of effectiveness.

Kennedy (2023) experiment (general fundraising with international orgs):

- Donors shown *effectiveness reports* trusted the organisation more than those shown efficiency reports.
- Donors punished low-performance charities who tried to hide behind efficiency numbers like low admin costs.



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# *Cognitive Limits*

**Number numbing** (or *psychophysical numbing* in the academic jargon) is about our brains short-circuiting when numbers get very large. It's rooted in cognitive psychology: the human mind just isn't wired to grasp scale beyond a certain point, so 1 million vs. 10 million feels almost the same.

**Accounting numbing** is a different beast. It refers more to *desensitisation caused by too much financial detail* — think of spreadsheets, ledgers, endless reports. It's not about scale per se, but about the overwhelming or anaesthetising effect of dealing with accounts, metrics, and bureaucracy until the human meaning behind them disappears.



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# *Reframing Impact Statements*

Current: *We supported 500 people this year.*

Improved: **500 people are living independently because of your support.**

Current: *Today, Concordia teaches 50,000 students who will address some of the most important research challenges of our time.*

Improved: **50,000 students have the opportunity to research important challenges in the areas of science, business, and engineering.**

Current: *We protected the Great Bear Rainforest from commercial logging.*

Improved: **Working in collaboration with local Indigenous groups, lobbyists, and hundreds of concerned citizens, the Great Bear Rainforest will remain intact for our kids, grandkids, and their grandkids to enjoy.**



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# Why Donors Don't Leave GiW

Research offers three big reasons:

- **Jargon and poor communication.** Australian GiW donors crave personal, clear, and empathetic communication. Generic or pushy asks backfire. Scaife (2010)
- **Lack of early engagement.** Universities lose GiW because they fail to build alumni relationships early — donors aren't engaged until it's too late. (McGill, Rundle-Thiele & Lye (2009)
- **Perceived difficulty.** Many donors think leaving a GiW is complicated, even if they like the idea. (Madden & Scaife, 2008)



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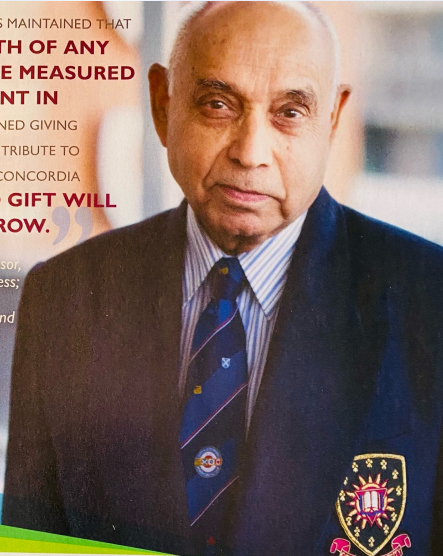
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# Barriers to Leaving a GiW

This?

MY GRANDFATHER ALWAYS MAINTAINED THAT **THE REAL WEALTH OF ANY COUNTRY CAN BE MEASURED BY ITS INVESTMENT IN EDUCATION.** PLANNED GIVING IS A LASTING WAY TO CONTRIBUTE TO EDUCATION. AS LONG AS CONCORDIA LIVES, **MY PLANNED GIFT WILL CONTINUE TO GROW.**

— Mahesh C. Sharma, professor, John Molson School of Business; creator of Uma Sharma Memorial Graduate Award and Sandhya and Swati Sharma Memorial Scholarship



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YOUR LEGACY  
YOUR PLAN**

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#CUpride concordia.ca/plannedgiving

Source: [Concordia University](https://www.concordia.ca/plannedgiving/)



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# Barriers to Leaving a GiW

University of  
**Kent**

Clearing

Study

New students

Research

Partner with us

Q

☰

Giving

Menu

## Or That?

## THE DIFFERENCE YOU MAKE

Inspiring stories of lives transformed by your generosity

Impact stories

## Thank you for believing in me

“Your generosity has validated my passion and commitment. I will strive to honour your support by making meaningful contributions to society.”

Morton Thornton, PhD Law

Read more

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Source: [University of Kent](#)

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# Barriers to Leaving a GiW

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**2017  
FAILURE  
REPORT**

Source: Engineers Without Borders Canada

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# Barriers to Leaving a GiW



Get involved

Support us ↗ Partner with us ↗ Grow your business ↗

What we do

Problems we solve

Where we work

Knowledge hub

About us



Donate

## Failing Forward: Lessons from Investing at the Edge

A majority of Acumen's investments have been unsustainable financially, did not have the impact we had hoped, or it is too soon to tell. It's uncomfortable to talk about failure, but if we don't, we miss the opportunity to learn and make real progress towards eradicating poverty.

 Failing Forward Report



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Source: [Acumen](#)



# Impact Reporting as Stewardship

Gugerty & Karlan (2018) call it the 'Goldilocks principle' — right-fit reporting.

- Too little = appearance of being secretive
- Too much = overwhelm donors with irrelevant data
- 🎉 Just right = practical, rigorous, and donor-friendly.

Their CART framework for making decisions on what data is just right and enough:

- Credible: collect and accurately analyse only high-quality data;
- Actionable: only collect data that an organization can commit to using;
- Responsible: collect data only when the benefits outweigh the costs of doing so; and
- Transportable: limit data collection to that which will generate knowledge for other programs.



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# *Impact Reporting as Stewardship*



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## Reflection:

*'What's one piece of reporting you already do that  
could be reframed as a trust signal?'*

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# *Who Leaves Gifts in Wills?*

Those with **no children** are far more likely to leave a bequest.  
(Wiepking et al., 2010).

**Modest-income donors** often leave proportionally larger gifts than the wealthy.  
(Baker, 2007).

The best predictor? **Past giving behaviour.** Loyal, generous donors are far more likely to leave a gift.  
(Wiepking et al., 2010).

Key takeaway: focus less on high-net-worth lists, and more on your loyal base.



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# Who Leaves Gifts in Wills?

What kind of impact reporting would resonate most with them?

**Wealthy businessperson**



**Loyal mid-level monthly donor**



alamy image ID: 204868 www.alamy.com

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**Childless single with  
modest income.**



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# *Let's Land That Plane*

## Case Study Exercise:

You are mandated to develop one document to inspire donors to consider a gift in a will. It must focus on building trust and confidence in the organisation while at the same time, giving them information about the importance of gifts in wills at the organisation.

Draft an outline with point form ideas of content that will signal donors about the organisation's efficiency, transparency, and trust.



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# Wrap Up

- Trust is fragile, but foundational.
- Impact reporting is not compliance. It's stewardship.
- To unlock legacies, charities must:
- Report outcomes, not just outputs.
- Balance data and stories.
- Show stability, humility, and vision for the future.

👉 Write down one change you'll make in your reporting next quarter. Your future donor will thank you.



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*But wait, there's more!*

**How do you define a woman/couple that is childless and one that is child-free?**



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# *Childless vs childfree*

**Childless** and **childfree** are terms used to describe people without children, but they carry distinct connotations.

- **Childless:** Refers to individuals or couples who do not have children but may have wanted them or expected to have them. It often implies an absence of children due to circumstance, such as infertility, medical reasons, or personal situations beyond their control.
- **Childfree:** Refers to individuals or couples who have consciously chosen not to have children. It is a deliberate lifestyle decision based on personal preference, beliefs, or priorities.



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# Some data

## In the UK:

Data shows childfree people are more likely to leave a gift to a charity in their Will. Just 8% of Britons aged over 50 who have children do so - but that number rises to 24% for those without children.

55% of all gifts in wills to charities are from childless people

Childless people are 5x more likely to leave a gift to charity in their Will.

## In Australia:

- **Childless:** is around **16.4%** for Australian women aged 45–49 (2021), up from roughly **9%** in 1986.
- **Childfree:** affect around **9%** in younger cohorts (early 20s), with projections indicating the percentage might reach **24%** by the end of reproductive years.



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# Childless older adults give more during life and much more at death

**Table 3**  
**Estate Giving for Deceased Panel Members in 1995–2006**  
**Health and Retirement Study by Offspring**

Offspring	Last Annual Volunteer Hours	Annual Giving	Estate Gift	Estate Gift Multiple
No children	32.6 (6.6)	\$3,576 (2,073)	\$44,849 (24,128)	12.54
Children only	25.4 (7.1)	\$1,316 (229)	\$6,147 (2,177)	4.67
Grandchildren	23.2 (2.1)	\$1,497 (199)	\$4,320 (783)	2.89
Total	24.3 (1.8)	\$1,691 (269)	\$8,582 (2,609)	5.07

Source: Dr. Russell James, Texas Tech University

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# Common Judgments & Preconceived Ideas

**Incomplete:** Assumed that their lives are unfulfilled or lacking because they don't have children.

**Reality:** *Many childless women lead deeply fulfilling lives through careers, travel, friendships, and community involvement. Fulfilment is not solely defined by motherhood.*

**Pitied:** Often viewed as deserving sympathy or as if they have experienced failure.

**Reality:** *While some childless women may grieve the loss of having children, many move through grief and find other ways to create meaning and joy in their lives.*

**They Didn't Try Hard Enough:** Assumed they didn't explore all available options (e.g., fertility treatments, adoption).

**Reality:** *Many childless women undergo extensive efforts, both emotional and physical, to try to have children. These processes can be deeply personal, and the decision to stop pursuing them is often complex and well-considered.*

**They Have More Free Time:** Belief that childless women have an abundance of time and flexibility compared to mothers.

**Reality:** *Childless women often have significant commitments, such as careers, caregiving for aging parents, or community work. Their time is just as valuable and structured, often filled with meaningful pursuits.*



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# Common Judgments & Preconceived Ideas

**Less Valuable:** Assumed that they contribute less to society or are less worthy because they aren't mothers.

**Reality:** *Childless women contribute to society in myriad ways, through professional achievements, volunteer work, and philanthropy. They often invest time and resources into creating legacies that are impactful and lasting.*

**They'll Never Understand Real Love:** Often told that without children, they will never know the depth of unconditional love.

**Reality:** *Childless women experience deep, loving relationships in many forms—whether through partnerships, friendships, or extended family. Love is not exclusive to parent-child relationships.*

**They'll Regret It:** Assumed that childless women will eventually feel regret for not having children.

**Reality:** *While some childless women may grieve, many come to terms with their circumstances and live fulfilled lives without regret. Their life paths may simply take different, but equally meaningful, directions.*



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# *Are we asking the right questions?*

## Strategy #4:

### Find your kid-free donors

Use this question in your surveys:

- *"Do you frequently discuss your passion or interest in [mission] with your children?"*
  - Yes - often
  - Sometimes
  - Rarely or never
  - N/A - don't have kids



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# *Last Words*

## **Avoid Assumptions:**

It's crucial to **never assume** a woman's circumstances or reasons for not having children. Whether by choice or circumstance, the journey to being childless or childfree is deeply personal. Empathy begins with recognizing that everyone's path is different and may include complex feelings or decisions.

## **Use Inclusive Language:**

In all your communications, avoid language that centers parenthood as the default or the ideal. Instead, use **inclusive terms** that welcome all life paths. For example, avoid phrases like "as a parent, you understand" and instead frame messages around **shared values** like legacy, impact, and community.

## **Acknowledge Contributions Beyond Parenthood:**

Many women, both childless and childfree, contribute in powerful ways outside of motherhood. When engaging this audience, focus on their **unique contributions**—whether through careers, philanthropy, or other forms of social impact. This helps them feel valued for who they are, not for whether they have children.



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# *Last Words*

## **Create Space for Their Stories:**

Encourage conversations that allow these women to share their personal stories and motivations, rather than assuming their priorities. **Ask open-ended questions** about their passions and the legacy they want to leave. Listening with empathy goes a long way in fostering a meaningful connection.

## **Respect Boundaries:**

Not all women may want to discuss their reasons for not having children, and it's important to **respect their privacy**. Make it clear that legving is about their personal journey and values, not about conforming to societal expectations around family structures.

## **Celebrate Their Legacy Potential:**

Reinforce that her **legacy is not defined by having children**. Help childless and childfree women feel empowered by focusing on how they can make a lasting impact through their passions, values, and generosity. Legacy is about creating a positive future for others, regardless of parenthood.



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# Thank You!

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Let's stay in touch!

**Ligia Peña, CFRE**

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