

In from the cold (cont from page 5)

communications opportunity. Consider the two statements below which might appear in any thank you letter, press release, donor newsletter or annual report. Which might encourage you to think more about including a bequest?

- It is thanks to those who donate to *Guide Dogs* that we are able to provide our vital services to blind and partially-sighted people.
- It is thanks to those who donate to and remember *Guide Dogs* with a gift in their Will that we are able to provide our vital services to blind and partially-sighted people.

Building Relationships

Key to success is the personal touch. At *Guide Dogs* we use events as one of the tools in raising the awareness of legacy giving amongst our donors – using careful profiling to build the guest lists.

The days are focused as ‘get to know *Guide Dogs*’ where we highlight legacy giving as an important way in which donors can help *Guide Dogs* in the future.

Using appropriate and sensitive supporting correspondence (both before and after), those who attend are made aware legacy giving will be mentioned.

In the post-event phase we provide donors with the channel and opportunity to request further information.

Our team of regional legacy officers then start building key one-to-one relationships, turning interest into intention, and intention into long-term loyalty.

Now you have a growing bank of donors on your database who have confirmed their intention to remember your organisation in their will. What next?

The second key component is how you then cultivate the relationship with those donors – some which could last 20 years.

How do you keep them up-to-date with the latest developments from within?

For many it's the quarterly newsletter or invitation to the annual open day. For others it's a leave ‘as is’ policy. Donors continue to receive and respond to your direct mail appeals or attend community events.

Too often in the past, donors who ‘pledge’ were blocked on the database in fear that a direct mail pack would alienate their support – leaving the donor mystified: ‘I've just let them know I've left a gift and I've never heard from them since!’

Remember though, the vast majority of donors who go on to leave bequests may never inform you, which is why it's so important to convey the bequest message in regular donor communications.

Others may never appear on your database but they admire what you do through what they see in the media, how they perceive volunteers and staff they meet – there is no one single factor which will influence that decision.

Key is making sure that your bequest programme is viewed as an essential and integral part of your fundraising and communications strategy.

Recommended reading

I hope this has given readers a brief insight into the art of seeking bequests. If I'm allowed to plug a good read, try *The Art of Seeking Bequests* edited by Sebastian Wilberforce and published by the Directory of Social Change (www.dsc.org.uk). As an experienced bequest fundraiser I still dip into it regularly.

Good luck with your bequest programme! Key to its success will be engaging with – and gaining – the cooperation of and involvement from your fundraising colleagues, volunteers and trustees. ■

Email: iain.mcandrew@guidedogs.org.uk

“Reprinted with acknowledgement to ...”

Fundraising Forum prides itself on keeping South African fundraisers right up-to-date with developing attitudes, trends and techniques, both here and overseas. We are grateful to the following international publications, which are regularly quoted and highly recommended:

- *Successful Fund Raising*, PO Box 4528, Sioux City, Iowa, 51104 (12 issues per annum \$149) website: www.stevensoninc.com
- *The NonProfit Times*, 190 Tamarack Circle, Skillman, NJ08558 (\$129 per annum) website: www.nptimes.com
- *The Chronicle of Philanthropy*, PO Box 1989, Marion, Ohio, 4335-1989 (24 issues – one year at \$95) website: <http://philanthropy.com>
- *Mal Warwick's Newsletter* – Successful Direct Mail, Telephone and Online Fundraising. Strathmoor Press Inc, 2550 Ninth Street, Suite 1040, Berkeley, CA 94710-2516 (6 issues per annum \$79). website: www.malwarwick.com/newsletter

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Downes Murray International

Downes Murray International are fundraising consultants, working with non-profit and non-government organisations of all kinds, to increase their fundraising effectiveness.

We offer feasibility studies, strategic planning workshops, direct mail fundraising, mail/phone, corporate and capital fundraising campaigns, Internet fundraising and website design, church fundraising and bequest promotion programmes. In addition, Downes Murray International has close links with a number of fundraising consultancies across the globe, and represents DVA Navion International Consultancy in Africa, enabling us to keep a finger on the pulse of international trends and techniques. For more information contact your nearest office.

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Do you stand out?

Creating a uniquely differentiated brand is essential if you want your organisation to stand out from the crowd. Downes Murray International's Creative Director, Richard Solomon, attended the Institute of Fundraising's annual convention held in London recently, and reports on ways to make your charity unique.

INSIDE INFORMATION

Overcoming the skills shortage..	2
Philanthropy in focus	3
Banner ads – do they work?	4
In from the cold.....	5
Make sure your proposals hit the mark	6
Keep the conversation going	7
In from the cold (continued).....	8

In a world where people are faced with thousands of choices every day, getting them to support your charity is becoming increasingly difficult.

Giving donors a unique and rewarding experience when they support you is more important than ever before. So how do you go about developing a competitive advantage over your competition? A good place to start is ensuring that you have a 'crystal clear' fundraising proposition.

Simple idea

Steven Pidgeon, Chairman of Target Direct, describes a fundraising proposition as 'a theme which follows through in all the material you produce – a simple idea which persuades donors to support your charity. It provides clarity about the work they are supporting, and allows them to feel good about their support.'

Central to all your communications, your fundraising proposition is your 'offer' – which clearly differentiates why donors should support you, and why you will use their donations differently – and better – than other organisations.

Sound complicated? Well, not really. It's all about ensuring that your cause is not doing exactly the same work – or achieving exactly the same results – as other charities. Call it your point of difference or unique fundraising proposition.

Next up is making sure that you give your donors a consistently brilliant experience – make it more rewarding for them to support you than other charities. Think of it as great customer service.

How do you achieve this? Give your supporters what they want in terms of their relationship with you, provide useful and relevant feedback, listen to your donors, give more, and build mutually beneficial relationships with your donors ... essentially 'under promise and over deliver'.

You'll also need to start being more passionate about your cause.

Tim Hunter, Deputy Director of Fundraising for the National Society for the Prevention of Cruelty to Children (NSPCC) stressed the importance of passion and inspiration. He summed up the net result

of greater passion and inspiration as 'open minds, open hearts and open cheque books'.

It's up to you to inspire your donors, because an inspired donor is a loyal donor – and a loyal donor is a partner who will stay with you for life.

Ultimately 'people connect with a cause, not the organisation' – and the cause should become 'part of their identity and personal expression', Pidgeon said. Donors want to be able to make a difference, they're searching for fulfilment and purpose – and your organisation should be the one which gives them that opportunity.

It's also time to start listening more carefully to your donors, because they're the ones who will tell you how you stack up against the competition.

Creativity and innovation are another two key concepts that will make you stand head and shoulders above the crowd. What are your competitors doing, and how can you do it better? Are there new ways of doing things – dare to experiment, be revolutionary, and keep your organisation's 'dream' (vision) fresh.

Listen

And then there's the issue of making sure that you put your donors at the centre of your fundraising programme. Consider what their experience of your organisation is like, and how you can improve the way in which you treat your supporters.

You'll also need to learn to listen. Recognise when donors don't respond to mailings, learn from their requests and behaviour, give your donors choices regarding their relationship with you, and make it easy for them to give – in cash, time, and in kind.

Put these steps into practice, and you'll have a world-class programme in place. Because the more you give, the more you get.

And ultimately you could succeed in transforming your brand into a 'Lovemark', which www.lovemark.com describes as 'a new way of thinking about the things we love. Lovemarks are better than brands, because they are about Love and Respect: they speak to us as thinking and feeling human beings. Lovemarks embody Mystery, Sensuality and Intimacy'.

But that's another article altogether ... ■

Overcoming the skills shortage

It has often struck me that one of the tragedies of the South African non-profit sector is the severe shortage of skilled and experienced fundraisers.

In the United States, even with its 1,5 million charities, there are ample qualified fundraisers to go round. In fact the not-for-profit sector employs almost 10% of the US working population.

Even in the UK and Australasia there always seem to be more than enough qualified fundraisers.

So what's the difference here in SA – a country where unemployment is running at 40% or more?

It would be easy to hang the blame on a lack of suitable training programmes. But I think that's only part of the problem. Perhaps more important is that in South Africa fundraisers are often poorly paid and inadequately resourced to do their jobs.

Too many non-profits are looking for a miracle worker who will raise millions overnight. Or they want to employ someone on a commission only basis.

Of course, it's not as clear-cut as it may seem. Many organisations have had their fingers burned by poorly qualified people who don't know what they're doing.

And one of the other major problems I've encountered are volunteer boards who, with the best of intentions, drive the fundraising policies from a position of total ignorance or extreme prejudice based on a dark and distant past experience.

So the reasons for our sorry situation are many and varied – but what can we do about it?

Long-term solutions

The long-term solution is a strong professional body with adequate funding to employ a full-time staff, plus at least two tertiary educational institutions offering diploma courses in development and fundraising.

But where to look for such funding? Government would be an obvious solution. More professional and effective fundraising would help grow the philanthropic trends in our population, and would take some of the pressure off the need for subsidies for welfare and other non-profit entities.

Failing this, an international foundation could be found to invest in what is a powerful long-term benefit for the NPO sector.

Then there's the opportunity of one or

more of our universities 'twinning' with a US university which offers a development and fundraising diploma or degree.

All an impossible dream? I'd like to think that it could be made to happen, if only some 'seed' money could be found to begin the initiative.

Skills

But in the meanwhile – what are the short-term solutions to improve the low standard of fundraising professionalism in our country?

One solution is to appoint consultants qualified in various fundraising disciplines. During the time that they work with you, make sure that you have an employee (and perhaps board members) who work alongside them – and get 'on the job' training.

Fundraising consultants and consulting firms all have real life 'hands on' experience in one or more key aspects of fundraising. But you'll struggle to find one employee who is skilled in all different disciplines.

A skilled fundraising consultant doesn't mind passing on their skills during a consultancy contract (18 months to 3 years). I've seen many organisations emerge from such a contract period with a well-trained staff member and

a board who are much more knowledgeable about how fundraising really works.

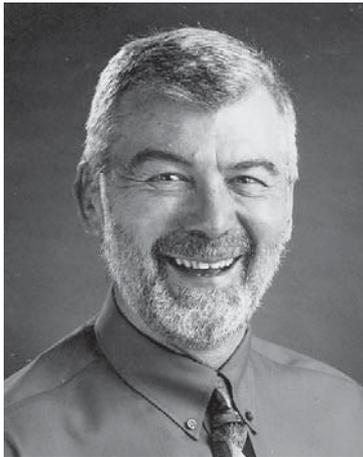
The consultant also has little to lose from this situation as a satisfied client will often see the merit in keeping on the

consultant (on a reduced time basis) to provide strategic advice.

Over the years I've also seen the opposite effect of a situation (particularly in direct mail) where a client employs the firm for 10-15 years or more – and then suddenly decides that they can save on costs and generate more income by taking the programme 'in house'.

The result is that a once healthy programme begins to fall apart. The number of active donors dwindles, not enough new donors are acquired, and any cost savings which may have been achieved in the first flush of going 'in house' have long been lost as the overall net income drops dramatically.

You may well be thinking that I am approaching this from a position of bias. But the sad fact is that in over 40 years in fundraising I have never seen an organisation show a long-term benefit from moving a direct mail programme 'in house' – and have, on many occasions been asked to come back in and help pick up the pieces of a once strong donor base which is now in tatters. ■



Terry A Murray is former Chairman of Downes Murray International and recently retired president of DVA Navion South Africa.

"In South Africa fundraisers are often poorly paid and inadequately resourced to do their jobs"

Gift solicitation

Keep the conversation going

Imagine an experienced development officer in the following situation: He engages a prospective donor in a conversation that leads to making the ask for a substantial donation.

The ask sounds something like this: 'Many people in the community take their lead from you, and we hope you will help raise the sights of the entire community with a gift of R500 000. How does that sound to you?'

Instead of agreeing the prospect says, 'You flatter me, but I'm not as wealthy as Bill Gates or Warren Buffet.'

Appropriate response?

What should the development officer's response be?

- 'We know it's a lot of money.'
- 'Is it the size of the gift or the fact that we asked you now?'
- 'I think you know what your investment will do.'
- 'I can only imagine the demands on your financial resources.'

If you guessed 'all of the above' you are on the right track to keeping the conversation going, even when the prospect has seemingly closed the door on your request. And, according to Roberta A. Healey, MBA, CFRE and principal at Farr Healey Consulting, a non-profit consulting firm based in Philadelphia, USA, the goal of any development officer is to build on the conversation and not apologise for the ask.

'Sometimes in our prospect rating, we really blow it, and we're asking for a gift that, no matter what, is too large,' Healey said at a recent fundraising conference in Seattle.

'And I think not apologising is critical to this, because if we find that we've overestimated, we get nervous that they're going to hate us forever. And, of course, it's possible that someone could get irked, but it really depends upon whether we dignify their objection in the way we respond. The primary way to do that is to validate what they've said,' according to Healey.

In a seminar entitled *Teaching and Coaching Successful Major Gift Solicitation*, Healey offered practical tips for helping fundraisers be successful when asking for large donations. Part of the coaching process is helping fundraisers with the correct language to use when making the ask. Healey suggested encouraging them to use their own words as much as possible.

'I believe we do best when we say to people, 'If I were going to ask, I might say something such as ... What would work for you? And then brainstorm with them, and let them put in their own words, a phrase that makes sense,' she explained. 'That way, you can help them articulate words that they are

comfortable with, that roll off their tongue easily, instead of saying, 'These are the three things you can say to lead into a gift, memorise them and you'll do fine.' We need to coach and foster within people that they can do it in words that make sense to them and that they are comfortable with.'

One of the 'rookie' mistakes development officers make when prospects say no is apologising for asking. Hearing the prospect say, 'That's too much money' gives officers the opportunity to ask more questions, not to stop the conversation. Probing what the objection is – 'Is it the size of the gift or the fact that we're asking you now?', for example, allows you to turn stumbling blocks into building blocks.

Another rookie mistake development officers make when asking for a major gift is thinking only about their own value system and priorities. Unless fundraisers look at the reasons why people could and do say yes, they run the risk of framing the ask in a way that makes sense to them, but doesn't resonate with the prospect with whom they are working.

'We tend to think for our age category, and we tend to think for our value system,' Healey said. 'That works for people our age with the same values, but there are a lot of people not our age with different value systems. Think carefully about the stereotypes that you overlay on your asking. Some donors really like to be begged; others want to be asked once. As an experienced development officer, when you're looking at the profile and the pattern of the people with whom you're working, knowing that well in advance can cause you to avoid very uncomfortable situations.'

A win is a win

A third rookie mistake is telling the prospect that he or she is wrong. If the prospect is not interested in funding the particular programme for which you are fundraising, the prospect might be willing to donate to another programme at your organisation. Healey believes it's important to coach fundraisers that a win for the organisation is a win, even if the money goes someplace else. If your organisation is truly focused on donor-centred fundraising, a win is a win, even if it's not for the programme for which you thought you were fundraising.

'Think before you work on training folk or mentoring folk about those things that were 'aha' moments for you 10 or 15 years ago – or even two or three,' Healey said. 'Those are the things we need to very purposefully share, because if we don't, we run the risk of assuming that people know what we know, and that's not necessarily true.'

You've secured a meeting with a potential major donor. You've planned your strategy, and prepared the 'ask'. Then their response to your request is 'No!' What next?

Gina Bernacchi reports on ways to keep the conversation going, and to turn a 'No' into a potential 'Yes!'.

*With acknowledgement to
The NonProfit Times
April 15, 2005*

Applying for ongoing funding? Make sure your proposals hit the mark

We asked Esmé Arendse, Head of Corporate Social Investment at Sanlam, and fundraising consultant Jill Ritchie to share their views on funding proposals. This is what they had to say.

Q What separates a good application for funds from a company's Corporate Social Investment (CSI) budget, from a bad application?

EA: A good application obtains the required funding or starts a relationship with the donor organisation which results in funding over a period of time.

Extensive discussions need to occur between the fundraiser and donor, and often funding will not take place until there is a proper understanding of each other's organisations and goals.

The written proposal is one element of the application procedure, but by far not the most important. It should also not be your first point of contact with the donor organisation, but should follow a personal introduction or phone call in which an alignment of goals is established.

The timing of the application is also crucial – most donor organisations have funding cycles and the application should be timed correctly.

A good written application needs to include the goals of the organisation, a clear statement of the funding request as well as a budget.

Fundraisers must remember that financial support is not the only corporate involvement that can add value. Corporate volunteers and the use of venues are just two of the many other forms of support that are available.

JR: A good application is about partnership – not begging or demanding.

It's about outlining how the company and the NPO in a symbiotic relationship (the company would like the services delivered but does not have the skills to do so; the NPO has the expertise but not the money) can serve those in need. A good application offers a company the opportunity to be involved.

Q Has the nature of CSI changed in the last five years, and if so how?

EA: Many corporates have articulated a shift from pure welfare driven philanthropy to strategically focused social investments. But if one examines funding activity then a lot of 'chequebook' charity still takes place.

Until very recently, this was still the case at Sanlam. However, we have re-engineered our social investment spending to contribute to core business activities and to position Sanlam as a socially responsible and relevant corporate citizen.

There are two reasons for this shift. Firstly, CSI has been managed as a purely philanthropist and welfare function, and secondly there has been no defined investment

philosophy governing activities, resulting in ad-hoc and disparate involvement in communities.

In addition, our staff volunteer programme is becoming a core leg of our involvement.

JR: Very much! Staff members are involved in drawing up the grant-making criteria and selecting beneficiary organizations. More money is being spent in the areas where workers live, and on their families (eg: bursaries, the upgrading of a local crèche).

Also, I detect companies are being more strategic in their giving – supporting fewer organizations and nurturing relationships.

Q Using Sanlam as an example, what criteria do you use in evaluating an application?

EA: We employ a long-term value investment philosophy in managing our portfolio of social investments. We do rigorous research into an organisation's ability to deliver long-term, sustainable solutions in our focus areas of education, economic development, HIV and social development. We research the organisation's ability to manage the project – it's long-term sustainability.

Q Do you ever visit potential projects in person?

EA: We apply a no-visit no-fund philosophy.

JR: Fewer donors are visiting due to the mushrooming of NPOs – they simply can't get around to them all.

Q How many companies in South Africa, to your knowledge, have CSI budgets and where is the best place to find out about applying to these?

EA: The *CSI Handbook*, published annually by Trialogue, is a good place to find information about companies involved in CSI.

JR: The top 500 listed companies certainly do and a growing number of medium and smaller ones do, too. My company (Papillon Press www.papillonpress.co.za) researches and offers this information to the NPO sector, or one can phone and find out what companies' grantmaking criteria are.

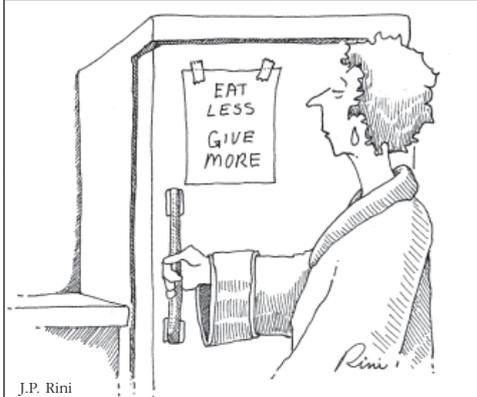
Q Are there any areas your company would or would not consider for funding?

EA: Our funding is concentrated in South Africa and we don't fund overseas travel.

JR: On the whole, companies have still not broken through their resistance to funding running costs, and even more rare is the company that shares the vision of an NPO building up an endowment fund, and supporting it! ■

Milestone Thinking

On-target observations in brief



*With acknowledgement to
The Chronicle of Philanthropy
May 12, 2005*

Writing, 'this may be a difficult time for you to write a cheque', helps donors endorse that thought. The most troubling and dangerous thing to do in a letter is to present a barrier to giving and leave it there.

*With acknowledgement to
The NonProfit Times
September 15, 2003*

Ethics is vital in fundraising. When a fundraiser acts unethically, the organisation's credibility goes out the window.

*With acknowledgement to
Mal Warwick's website
www.malwarwick.com*

If your non-profit is based in a smaller or rural community, establish the goal of having a certain percentage of the entire population as annual contributors.

*With acknowledgement to
Successful Fund Raising
November, 2003*

Include an easy means of response. Even those you have in tears can lose pace while they're hunting through the desk for an envelope and a stamp.

*With acknowledgement to
The NonProfit Times
June 15, 2005*

Before focusing on a gift's benefits to your charity, discover those benefits that most matter to the donor.

*With acknowledgement to
Successful Fund Raising
June, 2004*



Challenging prejudice

Eco-Access teaches respect for ourselves, for others and for our environment.

It is a non-profit organisation that ensures that disabled people have access to nature. Eco-Access also helps disabled and non-disabled people to interact and experience the wilderness through unique 'twinning camps'.

Twinning links participants through specific activities – allowing people with diverse backgrounds and abilities to get to know each other in a non-threatening environment.

And while participants focus on nature, they get to know each other as human beings – barriers are broken and real change takes place in their attitudes.

Eco-Access workshops, camps and outings aim to conquer the fear of interacting with people with disabilities. And while bonds are being developed and friendships formed, fear is transformed into respect – people get to see the good in each other.

Eco-Access also encourages environmentalists to develop a natural environment accessible to all people, while encouraging all people to take responsibility for caring for the earth.

And at the end of the day, non-disabled people – who thought that they were coming to 'help people with disabilities' – leave with the realisation that 'disabled participants have taught them so much'. They leave changed – challenged by their own prejudices.

(Readers are invited to submit photographs, together with a brief overview of their organisation's work, for inclusion in this regular feature).

Many non-disabled people never have the opportunity to interact with people with disabilities. Fear, prejudice and uncertainty are the result. But Eco-Access is working to change all this.

Visit www.eco-access.org

FUNDRAISING FORUM

Fundraising Forum is a regular newsletter dedicated to the enhancement of management, fundraising techniques and the promotion of community service, welfare and not-for-profit organisations of all kinds.

It is published by Downes Murray International and circulated, free of charge, to anyone with an interest in the growth and improvement of the non-profit sector and those served by it. In addition to regular features written by Downes Murray International staff, there are extracts from worldwide fundraising publications which are reprinted with acknowledgement to the publishers.

We welcome submissions for publication from all writers involved in not-for-profit work.

Visit www.dmi.co.za

Banner ads – do they work?



Driving traffic to your organisation's website is a perennial challenge. Sheila McCallum, who heads up online fundraising development at Downes Murray International, shares the results of a recent banner ad campaign.

Banners designed for (from top to bottom) SA National Council for the Blind, Wildlands Conservation Trust and Catholic Welfare & Development.

Using banner ads on other people's websites to drive traffic to yours is a technique that has not found much favour among the international online fundraising community. 'Doesn't work,' 'Too expensive,' are some of the criticisms levelled at this type of promotion.

Thanks to some free advertising negotiated with 5fm and M-Web recently, Downes Murray International was able to test the concept – with some interesting results.

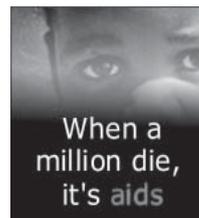
M-Web gave us 100 000 impressions of a traditional 468 x 60 pixel banner ad, while 5fm gave us a square 'hot button' on their home page for a fixed two-week period at the end of July.

Strategy

In order to gain maximum value from the exercise, we spread the test among five welfare clients for whom we handle online fundraising – SA National Council for the Blind, Desmond Tutu HIV Foundation, Wildlands Conservation Trust, TAFTA (The Association for the Aged) and CWD (Catholic Welfare and Development) – and tested a different creative approach for each.

Animated banners were created for each client, and displayed on a rotational basis on the two test websites, with links through to the corresponding client's site.

5fm provided comprehensive statistics that enabled us to measure the number of times each advertisement was viewed, as well as clicks-through, whilst our own online database logged donations and subscription requests from web visitors.



Frames from the animated 'buttons' created on behalf of TAFTA and the Desmond Tutu HIV Foundation.

Low expectations

Of course, neither of these sites offers access to the traditional donor market. 5fm, in particular, is a radio station aimed at listeners in the 20-30-year-old age group, albeit the majority of them fall into LSM 8-10.

Based on the target market, we would have expected the most successful banner to be the one related to HIV Aids (*Tutu Foundation*) with conservation (*Wildlands*) being the runner-up.

Results

In fact, the *Desmond Tutu HIV Foundation* – with an emotive and hard-hitting banner – scored the least number of AdClicks, leading us to wonder if donor fatigue is becoming a problem in the Aids field.

CWD scored more than double the number of AdClicks achieved by the others. However, this is attributable to the 'teaser' nature of the ad, which simply read: 'Khayelitsha June 30: an eye-witness report', with no identifying logo.

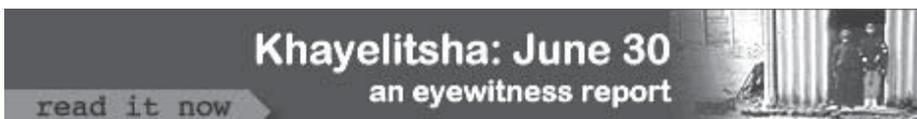
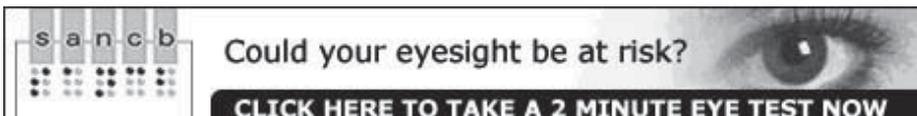
Third in terms of AdClicks, TAFTA emerged the clear winner when it came to actual donations made online. Several visitors also took the time to 'send a message to an old person' via the facility on the site.

This is a classic text-book example of the power of a direct appeal *vs.* the clever teaser-type approach. Fewer people react to the ad, but those who do, know what they are in for, and are already virtually committed to making a contribution.

Awareness

Apart from donations, the banner ads clearly created interest and awareness, with *Wildlands* and *CWD* scoring in terms of increased number of e-newsletter subscription sign-ups.

Is it worth your while to use them to drive traffic to your site? Yes ... with reservations: *if* you can find a busy and popular host site, preferably one that is aligned to your cause in some way; *if* you can negotiate a beneficial advertising rate; and *if* your main objective is greater awareness and increased traffic through your site. ■



Make your bequest programme part of your fundraising strategy

In from the cold

Bequest (or legacy) fundraising has been well-established in the United Kingdom for many years.

Many of the UK's largest charities wouldn't survive without the lifeline provided by people who remember a charity in their Will.

With predictions that bequest income (due to fears over the value of pensions, increasing cost of residential care, increasing life expectancy and changing lifestyle patterns) may well decline in the future, many in the UK's not-for-profit sector have invested in what are now well-established bequest programmes.

And it's not just the big guns – even the very smallest charities are investing in developing this lucrative revenue stream which accounts for £1.3bn p.a to the sector.

For *Guide Dogs*, income derived from bequests provides 59% of total income, (£29.7m in 2004) around 71% of total voluntary income.

Although in recent years *Guide Dogs* (along with many other charities) have been diversifying the fundraising mix to reduce dependency on legacy income, Wills are still likely to remain a major source of revenue.

So how do you establish a bequest programme?

The important things to consider are: Who are your supporters? Who would you like to leave you a bequest? Who is most likely to do so? Who already has? Do you know who may be? Have you in place a way in which they could express an interest or let you know? And if they did, what would you do with them?

To my mind there are two key components to any successful bequest strategy.

Getting started

The first is your existing donor care and contact strategy. Audit who your donors are and how they interact with your organisation. How do you communicate with your donors? Does that communication carry a bequest message? If it doesn't, how are your supporters ever going to know that leaving a bequest could really help you?

And if it is mentioned, how valuable is it viewed by your organisation? Do you have to fight to get space in publications and communications? If you do, your organisation is missing a valuable opportunity.



Iain McAndrew is Legacies and Trusts Development Manager for Guide Dogs in the UK.

Iain McAndrew, Legacies and Trusts Development Manager for Guide Dogs in the UK, shares his experience on how to establish and nurture your bequest programme. Iain is a guide dog user, and has developed and implemented an integrated legacy marketing strategy for Guide Dogs since 2000.

Converting intention to action

When it comes to the trigger point which prompts an individual to decide how they will dispose of their estate, only luck will deliver an annual bequest message at that point.

But if throughout that donor's relationship you have regularly incorporated the need as part of what they learn about your organisation, you are ensuring that your organisation is more likely to be front of mind at the point a Will is being written.

Again, consider how those intermediaries can help. *Guide Dogs* is part of the *Remember a Charity Campaign*, a 135 sector consortium that has joined forces to raise the awareness of legacy giving, part of which has been to encourage solicitors and the financial community to ask their clients when writing a Will if they wish to include a charity in their Will. (www.rememberacharity.org.uk or www.legacypromotioncampaign.org.uk).

From that you will see that the responsibility for raising awareness of bequest giving isn't simply the task of the bequest fundraiser. They need to utilise each and every

Continued on page 8