

TOP TIPS — COVID 19 EDITION: Legacy Fundraising in the time of COVID-19



1. This may FEEL like a tricky time to speak to your supporters about leaving a legacy, but actually it's a great time. Many of our clients are getting more calls than usual from donors wanting to know if they can support in this way. It's on their minds. And they are taking the time to make or update their Wills, as they tidy up their personal admin.



2. Not only that, but some supporters who are worried about their cash flow will be open to considering a bequest for your organization, as a wonderful way they can contribute right now, without having to find money in a tight household budget.



3. People are hard-wired to help. And brain research tells us that people feel better when they can take action in a crisis. You actually reduce fear and anxiety when you help people to help others.



4. But DO re-work all your messages around legacies, to make sure you acknowledge the unique and bewildering situation we are in, and that you understand what supporters are feeling and concerned by right now.



5. And DO use the drip-drip approach to legacy fundraising — making the most of appeals, compliment slips in direct mail appeals, checkboxes, newsletter articles, and conversations. Featuring someone who has already left a bequest to your charity is a great way to make a legacy ask — your donors will relate to them.



6. Free and Low Cost. Yes, you need a budget to be successful, but you can lay the groundwork for free or at a low cost. Gather stories, carve out a new section on your website, negotiate for some space in the next issue of your newsletter.



7. Make it easy. Your prime prospects for legacy gifts have older eyes that need nice big readable fonts on high contrast background (preferably black text on white) and lots and lots of white space.



8. Keep it personal. You are asking your donors to add your name next to the kids' and the cats' in their Will. This is deeply personal. Leave the business writing style guide on the shelf.



9. Make it conversational. Think about how you speak with your closest friends and family members. This is how your legacy marketing materials should sound. And this is a 2-way street...invite your donors to contact a real person at your charity to ask questions, share stories and let you know they've decided to make the most significant gift of their lives.



10. Use Emotion. The decision to give is an emotional one. You need to inspire your donors. Make sure your copy makes them feel – not just think – about making this type of gift to your charity.



11. If you have to fight for budget, this may help: ask the holders of that budget to imagine where your organisation could be the next time there's an economic crisis if they already had a steady, reliable revenue stream that was heavily insulated from economic storms.



12. And again – this is a great time to focus on your donors, and what you can do to support them instead of just what they can do to support you. Spend time on the phone with the folks who've already pledged a legacy, or the folks you are likely to ask. Send them the occasional, non-ask note. See if they're lonely. Is there something you could send them that could help? A book related to your mission? An article about one of the performers scheduled to be in the season you had to cancel? A recipe, or Friday afternoon Zoom tea break? Perhaps most relevant of all right now – a nice mask sewn by friendly volunteers?

Sorry that's 12 isn't it? But there you go – legacies are that important! And plenty more to come.

Have a tip you want to share?

Email: lynne@harveymckinnon.com