

Workshop Description

Legacy Marketing for Heritage Organisations Masterclass

About This Workshop

This masterclass workshop builds on the fundamentals of legacy marketing that are covered in the original Giving to Heritage Legacy workshop. It is designed to help delegates develop expertise in this area by focusing on specific tactics and techniques as well as providing insight into successful ongoing legacy management and crucially how to train volunteers and other stakeholders in having a legacy conversation.

Who Should Take This Workshop?

This advanced workshop is designed for more experienced fundraisers as well as previous attendees of the Giving to Heritage Legacy workshop. It is also ideal for those who have actively started marketing legacies and are looking to develop this and take it to the next level.

Time: 10:00-16.30 (arrival from 09:45)

Pre Workshop Work - You are welcome to bring any legacy materials with you including literature from previous legacy campaigns you have been involved with (optional).

Learning Outcomes

On completion of this workshop, it is expected that delegates will be able to:

- Understand the latest research into who leaves legacies and why.
- Understand why legacy giving is the most efficient form of fundraising in terms of income vs cost.
- Discuss what is different about the heritage sector in terms of legacy giving, why the heritage sector is generally not as strong in this area of fundraising as other sectors and where there is scope for growth
- Utilise the most appropriate and effective tactics to promote legacy giving
- Integrate the legacy message throughout the organisation
- Steward legacy supporters appropriately

- Manage legacy income in order to maximise value
- How to integrate legacy giving in both small and large heritage organisations
- Train volunteers and other stakeholders within the organisation in how to hold an effective and appropriate legacy conversation.

Outline of Content

The core topics are:

- Recap of who gives and why with a focus on the most up-to-date research findings
- Specific tactics:
 - o Promoting legacies online
 - o Running legacy events
 - o Legacy direct marketing
 - o Experiential legacy fundraising
 - o Bringing the above together into integrated campaigns
- Getting internal buy-in – how to implement a successful legacy strategy in your organisation.
- Stewarding legacy supporters and the legacy supporter journeys
- Legacy management – the basics (i.e. maximising the value from gifts left in wills)
- Talking legacies – one-to-one legacy fundraising and training volunteers and stakeholders in how to hold a legacy conversation.

Learning Methods

The workshop will use a range of methods including:

- Trainer directed presentation
- Learner personal reflection
- Whole group discussion
- Small group exercises
- Practical tasks in pairs
- Use of and discussion of case studies. Both of good practice in legacy fundraising in heritage, together with less successful legacy campaigns.