



# LEGACY GIVING HEALTHCHECK QUESTIONNAIRE

This is a short-form version of the Healthcheck questionnaire I use with new clients. It is based upon the [10 key steps](#) of my Legacy Giving Essentials programme. It will help you reflect in a structured way on the current health of your legacy programme. A strong understanding of your organisation's current culture, attitudes and ways of working (for legacy giving and more generally) and the context in which you are working is critical to long-term legacy giving success.

The questions will help you reflect upon current performance and identify clues to generate insights which can help strengthen your legacy programme.

**If you'd like my help to understand the clues, generate insights or to develop recommendations, informed by my knowledge and experience of the wider legacy sector, please do get in touch.**

<b>Internal Landscape</b>	Please capture any internal barriers/opportunities you can see in relation to your legacy giving programme.	e.g., resourcing; investment; priority; willingness; knowledge etc.
<b>External Market</b>	What do you think the key external challenges and opportunities are in relation to growth of your legacy giving programme?	e.g., legal; cultural; demographic; competitors etc.
<b>Vision &amp; Mission</b>	Do you think your current legacy giving activity has a clear purpose and objectives?	A clear purpose and objectives will help strengthen your legacy giving programme.

<b>Vision &amp; Mission</b>	How integral would you say legacy messaging is to your wider market and communications activity?	The most successful legacy programmes are those where messaging is normalised/part of everyday activity.
<b>Donor Centred</b>	Please capture your key supporter groups.	Better understand your audiences. e.g., one off donors; regular givers; mid-value; major donors; corporates; trusts etc.
<b>Donor Centred</b>	What do you know about why they support your organisation?	A clearer understanding can help shape more effective messaging. e.g., motivation/affinity to cause, Donor Research Survey findings etc.
<b>Comms</b>	What are the core messages you currently use in relation to legacy giving?	Understand how you're currently talking about legacy gifts and how might it be improved.
<b>Comms</b>	What tools/materials are available to support legacy giving activity?	Understand available resources – to identify potential gaps/improvements. Internal conversations, external promotion and supporter journeys.
<b>Strategic Approach</b>	What is your current market strategy/plan in relation to legacy giving activity?	Better understand the current nature of your legacy activity.
<b>Strategic Approach</b>	What would you say is the focus of current legacy giving activity?	Awareness; Acquisition; Conversion or Stewardship? Understand the focus and maturity of your programme.
<b>Strategic Approach</b>	How do you capture; store and manage data in relation to your legacy giving activity?	Which database (if any), what data etc.
<b>Tactics</b>	Which audiences do you currently talk to about legacy giving? Which could you?	An opportunity to identify gaps in current strategy/activity.

<b>Tactics</b>	Which communications channels / media do you use to promote legacy giving?	Website; printed materials; products; partnerships; printed materials etc.
<b>Network &amp; Influence</b>	Is legacy activity something that is regularly spoken about across your organisation?	To understand profile of legacy giving have internally.
<b>Network &amp; Influence</b>	Who would you say are the key people involved in GIW activity for your organisation?	Understand level of activity and engagement to establish if legacy giving is a shared responsibility
<b>Income</b>	How (if any) are the legacy gifts you currently receive processed once notified?	Help ensure legacy admin complies with legislative and regulatory frameworks. And, that the value of all gifts is being optimised.
<b>Measure</b>	What KPIs or measures of success do you have in place for legacy activity?	Clear objectives; KPIs and other forms of measurement will help you better demonstrate progress and showcase impact.
<b>Comms</b>	Are legacy gifts regularly acknowledged and celebrated?	e.g., included in Annual Report, Books of Remembrance etc. The more visible legacy giving is, the more it becomes an option for others.



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