

If you haven't done it already, take the online quiz at [www.surveymonkey.co.uk/r/XD62XHQ](http://www.surveymonkey.co.uk/r/XD62XHQ) to find out which character type you are

## Legacy CHARACTER TYPES



A competency framework - structured against my 10 key steps - to help you understand your current performance and potential for growth

### 1 - LEGENDS (Sector leading / role models / optimised activity)

<b>Internal</b>	Legacy giving is a strategic priority for my organisation
<b>External</b>	Our strategy is built upon a rigorous process of insight gathering and data analysis
<b>Vision</b>	Everything we do is aligned to our vision and mission
<b>Donor</b>	We understand our donors and put their needs at the heart of everything we do
<b>Strategy</b>	Legacies is a strategic priority for the organisation and is appropriately resourced
<b>Comms</b>	We have an <b>emotionally</b> engaging legacy proposition build upon donor insight which is aligned to our organisational brand and wider case for support
<b>Tactics</b>	We've got detailed plans in place across all channels aligned to the overall strategy
<b>Network</b>	Legacy giving is a shared responsibility across the organisation
<b>Income</b>	We have a professional; proactive and sensitive legacy admin resource that optimises the value of every gift
<b>Measure</b>	We have shared KPIs for all teams and regularly celebrate legacy successes

### 2 - LEADERS (established but sub-optimal)

<b>Internal</b>	Legacy giving is on the agenda with good cross-team collaboration
<b>External</b>	We have a good understanding of the legacy market and our place in it
<b>Vision</b>	We've got an organisational vision but not one for legacy activity
<b>Donor</b>	We've got donor journeys in place, but they could be better integrated
<b>Strategy</b>	Legacies are on the radar, and we have a strategy, but we could be better resourced
<b>Comms</b>	We have specific messaging and a range of materials to support our work
<b>Tactics</b>	There's legacy messaging across most channels but we could do better
<b>Network</b>	The legacy team is visible and effective (most of the time) but we could do more
<b>Income</b>	Legacy admin is great but they are a under resourced
<b>Measure</b>	There are KPIs in place for key teams and we could be better at sharing legacy stories

### 3 - LEARNERS (emerging/have potential)

<b>Internal</b>	We struggle to have conversations about legacy giving internally
<b>External</b>	We have some insight but have done nothing with it
<b>Vision</b>	We've done a few things in the past but it's all been quite tactical
<b>Donor</b>	We've done some donor profiling but we tend to treat everyone the same way
<b>Strategy</b>	Our overall approach is more short-term and tactical, there's no strategy in place
<b>Comms</b>	We're working on our first legacy leaflet
<b>Tactics</b>	We're trying, but it's difficult to get access to channels and audiences
<b>Network</b>	It's difficult to engage as others don't think legacy giving is their responsibility
<b>Income</b>	We don't have a trained admin person – it's just part of someone else's role
<b>Measure</b>	We collaborate with some teams, but it's on an informal basis

### 4 - LIGHTWEIGHTS (new-entrants/historic resistance)

<b>Internal</b>	My Board / CEO think it's insensitive to talk about legacy giving
<b>External</b>	We've never really consider the wider 'market'
<b>Vision</b>	What's a vision?
<b>Donor</b>	We're not really sure who we should be talking to about legacy giving or how
<b>Strategy</b>	We don't have a plan for legacies
<b>Comms</b>	We don't really talk about legacy giving in any of our materials
<b>Tactics</b>	I think it's on the website, but I'm not sure
<b>Network</b>	I've never spoken to colleagues about legacy giving
<b>Income</b>	We haven't had a legacy gift yet
<b>Measure</b>	Promoting legacy giving is my job