

LEGACY GIVING STRATEGY FRAMEWORK TEMPLATE

ORG AMBITION	
FUNDRAISING MISSION	
LEGACY VISION	

STRATEGIC THEMES	STRATEGIC AIMS		
1 - Make legacy giving a strategic priority for the organisation	Develop a 3-year legacy strategy with clear-aims and objectives		
2 - Acquisition: Make it an option. Increase the number of conversations we have about legacy giving	Make legacy giving a responsibility shared by all		
3 - Conversion: Encourage active consideration and make it easy for people to take action	Provide supporters with the information and support they need to take the next step		
4 - Stewardship/Retention: Recognise the decisions people have made and safeguard future income	Use insight and learning create sector-leading stewardship programme		
5 - Administration: safeguard and optimise the value of legacy gifts and relationships	Proactive; professional and sensitive legacy case management		

KEY ACTIVITIES

1 - Make legacy giving a **strategic priority** for the organisation

Embed legacy activity with shared objectives & KPIs for all teams				
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2 - **Acquisition**: Make it an option. Increase the number of conversations we have about legacy giving

Tailored training for all key stakeholders to build knowledge, skills and confidence				
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3 - **Conversion**: Encourage active consideration and make it easy for people to take action

Consider role of owned channels in support of conversion programme				
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4 - **Stewardship/Retention**: Recognise the decisions people have made and safeguard future income

Pledger survey to understand attitudes and needs of current pledger pool to inform activity				
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5 - **Administration**: safeguard and optimise the value of legacy gifts and relationships

Ensure appropriate delegated authority and gift acceptance & ethical policies are in place				
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