



Legacy web pages Audit template

Our charity's website is one of the best ways in which we can showcase the life changing impact of legacy giving to current and potential supporters.

Outlined below are the key areas: navigation; proposition; communication; content and call to action, which I believe are key to a great legacy giving web presence. Use the questions below to reflect on your own website; identify potential issues and to think about possible improvements. If you'd like to talk through your findings or discuss further support to help you make any improvements, please do get in touch.

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Navigation

Is there a legacy giving message on the organisation's homepage?
Where do the legacy giving pages sit in the overall hierarchy? e.g. 'Get involved' or 'Support us'...
How easy are your legacy giving pages to find? e.g. number of clicks from the Homepage etc.
Does legacy giving appear as an option in navigation on other pages? Integrated or isolated?
How might this make someone looking for legacy information on your website think/feel?

Proposition

Do you have a specific proposition for legacy giving?
Is legacy giving or will writing the focus of your web pages?
Is there an organisational or donor focus on your web pages?
What tone/language do you use?
Are the positive benefits of legacy giving to donors covered, or is the focus on your work and beneficiaries?
Is the unique opportunity presented by legacy giving – over other forms of giving - clearly presented?

Communication

Is the focus on impact and outcomes or on barriers to giving?
Is your communication more rational or emotional in nature?
Is your focus on the mechanics of will writing or the inspirational potential of legacy gifts?
Is your website full of technical information about will writing e.g. clauses; jargon busters etc.
Is the language you use progressive or reinforcing of myths and perceived barriers?
Does your website have a neutral tone – e.g. encourage all/any gift or is it directive e.g. 1%

Content

Who is your content targeted at? The needs of people at different stages of their journey will vary.
Are clause wordings included on your website?
Do you make reference to or provide a Codicil?
Do you include impact reports / statistics about your organisation and legacy gifts? Trust and efficacy.
Are there legacy specific case studies on your website? Storytelling.
Are you sharing pledger stories through your legacy giving pages? Social norming.
Have you included shopping lists in terms of what gifts might help your organisation to achieve?
Is there specific legacy giving video content on your website? Engagement and social first.

Call to action

Do you provide a dedicated personal contact or a generic email?
Is there the opportunity to access further info or support?
Do you have a web enquiry form
Are there downloadable resources on your website? If so, what are they?
Do you offer access to will writing? Is this 'always on' or campaign led (e.g. time limited)