

GENERATING LEGACIES ONLINE

Stage Two of Bluefrog's research into charities' use of the web in legacy fundraising

Responding to Further Information Requests

bluefrog



Research undertaken by Hugh Stockhill and Matt Parkes

January 2008

EXECUTIVE SUMMARY

In the second of two reports examining how legacies are promoted online, we assess how effectively charities follow up on requests for further information submitted via their websites.

Perhaps the most striking result from this part of the research is the fact that more than a third of the charities we studied did not respond to our request for further information. The materials we did receive, from the 60 charities that responded, form the basis for this Stage Two study.

In the same way as in Stage One, a series of objective measures were used to assess and score the legacy materials. The highest scoring charity scored 13 out of 15, and it was pleasing to see that only one in six scored less than half. In sharp contrast, 33 charities scored zero because they did not send any materials.

Among the findings that are detailed in the report, some deserve particular mention:

- Only 15% of charities avoid the use of design styles that make materials harder to read, such as reversed out text
- Only 32% of charities avoid the use of small text, thereby rendering some of their materials inaccessible
- Only 45% of charities emphasise the option of leaving a residuary legacy
- Only 45% of charities give a personal email address for a supporter to get back in touch with a named contact
- Only 5% of charities followed up the materials within three months to see if the enquirer needed anything else

By combining the scores from Stages One and Two, an overall winner emerges, with 29 points out of 35. Good practice abounds, but even those with high scores will find useful action points in this report to fine tune their legacy marketing.

INTRODUCTION

Background

In November 2007, Bluefrog published Stage One of a piece of research that sought to rate the functional aspects of the legacy pages from the top 93 charities by voluntary income, with legacy income detailed in CAF's *Charity Trends 2007*, that have legacy pages on their websites.

As part of that research, further information was requested from those organisations – via the website where possible or via whichever other channel was on offer, such as email or telephone.

This report comprises Stage Two of the research: a study into the follow-up to that request for further information.

Definitions

Almost every charity produces some form of legacy information materials, ranging from a simple leaflet or legacy booklet, through to very involved Will Making Guides or multi format DVD and printed information packs.

For consistency and simplicity, the phrase 'legacy materials' is used throughout this report.

Context

As noted in Stage One, legacy income is vital, representing an average of 12% of voluntary income for the UK's major charities¹. Giving potential legacy pledgers all the information and attention they need to ensure they add a charity to their Will is therefore crucial. Although use of the Internet continues to grow, particularly among the over-55s², many potential legacy pledgers will still request further information by post. Additionally, many charities mail their supporters generic legacy materials.

These materials are so integral a part of most charities' legacy strategies that their existence is assumed by donors. But given that most legacy enquirers are over 55, how much consideration is given to their needs? For example, how accessible or easy to use are they? And how easy do they make it to get back in touch?

Ultimately, the materials should be as effective as possible at converting enquiries into legacies.

Objective

The objective of this research is to rate the effectiveness and ease of use of the legacy materials requested from the 93 charities whose legacy websites were examined in Stage One.

As before, we put aside any subjective judgements – such as how dull or interesting the materials appeared – focusing, instead, on objective and measurable criteria, as detailed in the Methodology section.

¹ NCVO Voluntary Sector Almanac

² Hitwise, May 2007

HEADLINE RESULTS

Key findings

Of all the figures revealed in this study, some key facts leap out...

35% of charities – more than a third – did not respond to our request

Flabbergasting.

One in three of the UK's top charities sent the message that they are happy to ignore a potential £35,000³ donor.

There were some trends, such as the fact that the hospital charities did not respond – perhaps more understandable as they may not have the internal resources to respond to this sort of request (although they should certainly consider putting some process in place). However, the hall of shame is not the reserve of obscure or smaller charities; some of the big names are there. See WINNERS & LOSERS.

Of the 35% that did not respond, less than one in two failed to send anything even when they were contacted again three months later and reminded. Only three charities out of 15 that did respond apologised for the delay.

Of the 65% that did bother to reply originally, one in three took over three weeks to send anything.

All the subsequent figures in this report, therefore, only relate to the 65% of charities whose materials we received.

85% of charities use design styles in some or all of their legacy materials that make them hard to read for their target audience

It is widely understood that the use of reversed out text, greyed text or coloured text on another colour can make it difficult to read⁴. Yet only 15% of charities avoided the use of these styles altogether. This is considered discrimination under the terms of the Disability Discrimination Act⁵, as it means that people with visual impairment cannot access all of your materials. Given the weakened eyesight of the majority of those considering leaving a legacy, including many Baby Boomers, this seems unwise.

68% of charities use a point size of less than 12 in some or all of their materials

This is such a fundamental detail that it needs to be mentioned separately from the question of design style above. For a decision as important as whether to add a charity to one's Will, it should be made as easy as possible for a supporter to read the information. Actively making parts, or all, of these materials unreadable renders the endeavour pointless.

The indifference of these charities to the reading difficulties of many of their supporters is

³ CAF figures: average residuary value of £35,000, and £3,800 for pecuniary

⁴ There are many sources. One example is the RNIB's clear print guidelines, available on their website

⁵ Cf. information on the DDA at direct.gov.uk

not limited to traditional media. There is a correlation between their on- and off-line accessibility; 93% of charities that use point sizes less than 12 do not offer a large text option on their websites or legacy pages.

55% of charities do not emphasise the option of leaving a residuary legacy

Residuary legacies are worth nearly ten times more than pecuniary legacies⁶ – but sadly they are being eclipsed by the growth in pecuniary notifications. In addition, most charities report that residuaries are being spread more thinly; it is not uncommon to be one of 50 or more charities sharing a small portion of an estate. In this context, every opportunity should be taken to gently steer donors towards a residuary legacy, even suggesting a percentage, as CARE International and others have done.

45% of charities concentrate on making a will, as opposed to leaving a legacy

Given that as many as 88% of older donors have already made a Will⁷, the insistence on telling supporters how to do so seems a waste of effort. Our job is to sell the benefits of leaving a legacy and connect the supporter with the difference their gift could make.

With this in mind, it was a little worrying to see that 10% of charities do not talk about their achievements anywhere in their legacy materials.

Strangely, 69% of charities whose materials focus on making a Will do use a legacy focus on their website, indicating that in many cases printed legacy materials may not have been updated for a while.

28% of charities do not include a codicil form or even mention codicils in their materials

The imagined complexity of leaving a legacy to a charity can be a barrier to doing so. 'It is easy to amend your Will by using a codicil form', is a simple message but one that helps overcome that barrier – even if one decides not to include a codicil with the materials.

Another way to make the process as easy as possible for a supporter is to give suggested wording for their Will, even if only to illustrate how simple it can be. 82% of charities did so, but this leaves nearly one in five that allow potential barriers to remain.

55% of charities do not give a contact email address in their materials or covering letters

Older supporters are growing increasingly familiar with using email, especially those in the 50-64 age group, and so giving them the email address of a named contact seems natural. However, fewer than 50% do so. This seems odd when one considers that nearly 90% give the telephone number of a named contact.

A relatively small but still disappointing 7% do not give a contact name at all.

17% of charities – nearly one in five – do not include a pledge form in their materials

To paraphrase Paul Farthing of CRUK in *Professional Fundraising's* recent *Spotlight on Legacies*, being a slave to pledge rates can put a straightjacket on legacy marketing.

6 CAF

7 Adrian Sargeant research, 2003

However, asking a donor to tell us if they have – or intend to – add us to their Will can give an invaluable piece of information. It allows us to tailor the communication strategy for that donor appropriately; and it does give some rough guide to a legacy programme's success. Stripping out the only likely means of discovering this information seems short sighted. Not least because including a 'Pledge' tick box is only one of a range of ways to use such a form. Why not, for example, ask for donor feedback, or use it as an opportunity to learn about your donors by asking a few key questions?

95% of charities had not followed up the enquiry after three months

Clearly, being pushy is not the best strategy in legacy fundraising. But surely, nor is sending the legacy materials off into the blue and forgetting all about the supporter – until 'Enquirers' get pulled into a mass mailing as a generic segment.

Perhaps it is time to look towards our Major Donor colleagues. They would pay close attention to a supporter who indicated their interest in giving thousands of pounds. At the very least, they would follow up an initial enquiry with a quick phone call or a short letter, to see if the supporter needed any more information.

METHODOLOGY

Sample

The study is based on those 60 charities that responded to our request for further information, out of the top 93 charities by voluntary income with legacy income detailed in *CAF's Charity Trends 2007* that have legacy pages on their websites, studied in Stage One of this research.

If yours is one of the organisations whose legacy materials didn't reach us – perhaps having got lost in the post – do get in touch and we can run your materials through the same process to see how you score

Criteria

A number of objective criteria have been used to rate the materials, including how easily readable they are, how easy they make it to get back in touch and how effectively they talk about the organisation's work.

Scoring

A simple points system was used to rate each of the criteria, e.g. yes = 1 and no = 0. The scoring is unweighted, as we decided any weighting we introduced would have injected an unqualified bias into the results. The criteria and their point scores are listed below:

Were the materials received?

Was our request for further information granted? Did the requested legacy materials actually arrive?

- Yes 1
- No 0

Chasing the non-responders

Three months after the materials were requested, any charities that had not responded were contacted a second time and reminded. This did not form part of the core study, and was scored separately. In the DETAILED RESULTS section, the second pie chart shows the outcome of this additional stage.

Easily readable throughout

Is reversed out text, greyed text or coloured text on another colour avoided?

- Yes 1
- No 0

Sufficient point size throughout

How big is the text – a minimum of point size 12?

- 12+ 1
- <12 0

Emphasis on residuary legacies

Is emphasis placed on leaving a residuary legacy to the charity?

- Yes 1
- No 0

Will or legacy style

Do the materials concentrate on making a Will or on leaving a legacy to the charity?

- Legacy 1
- Will 0

Codicil form enclosed or mentioned

Given that many potential legators already have Wills, have codicils been explained or has a codicil form been included?

- Yes 1
- No 0

Wording for the Will

Is suggested wording given for inclusion in a Will?

- Yes 1
- No 0

Contact name

Is a named contact given in the legacy materials or covering letter?

- Yes 1
- No 0

Contact telephone number

Is a direct dial contact number given in the legacy materials or covering letter?

- Yes 1
- No 0

Contact email address

Is a personal email address given in the legacy materials or covering letter?

- Yes 1
- No 0

Pledge/response form

Is the donor given a means of telling the organisation they have added, or will add, the charity to their Will?

- Yes 1
- No 0

Testimonials or case studies

Are testimonials from supporters or beneficiaries, or case studies of areas of work, used in the materials to connect the supporter with a person or the mission of the organisation?

- Yes 1
- No 0

Achievements of the organisation

Are examples given of the difference the organisation has made – explicitly or implicitly illustrating the sort of difference a legacy might make?

- Yes 1
- No 0

Pictures of beneficiaries or the organisation's work

Are pictures of beneficiaries or the organisation's work, covering at least a quarter page, used anywhere in the materials? This measure was added, based on consistent feedback from legacy focus groups, that such pictures are effective at influencing the decision to leave a legacy⁸.

- Yes 1
- No 0

Follow up to the original enquiry

Has the charity followed up the original enquiry by getting in touch over the three months since that enquiry?

- Yes 1
- No 0

The maximum number of points available using these criteria is 15 and the charities have been ranked in descending order, in the following section.

8 Richard Radcliffe, Smee & Ford

WINNERS & LOSERS

Out of a possible total score of 15 points, the highest score was 13, with 33 charities out of 93 effectively being disqualified, as legacy materials were not received.

The first, second and third places, which incorporate the top 18 charities, are as follows:

1. Guide Dogs for the Blind Association
- 2= British Red Cross
- 2= Diabetes UK
- 2= Jewish Care
- 2= National Trust for Scotland
- 2= Royal National Institute for the Blind
- 2= Sense
- 3= Alzheimers Society
- 3= Blue Cross
- 3= Breakthrough Breast Cancer
- 3= Church of England Children's Society
- 3= CLIC Sargeant
- 3= National Trust
- 3= People's Dispensary for Sick Animals
- 3= Royal Air Force Benevolent Fund
- 3= St Christopher's Hospice
- 3= Water Aid
- 3= World Emergency Relief

Please feel free to contact Matt Parkes at legacies@bluefroglondon.com to receive detailed feedback on your materials.

Full ranking

Organisation	Score
Guide Dogs for the Blind Association	13
British Red Cross	12
Diabetes UK	12
Jewish Care	12
National Trust for Scotland	12
Royal National Institute for the Blind	12
Sense	12
Alzheimers Society	11
Blue Cross	11
Breakthrough Breast Cancer	11
Church of England Children's Society	11
CLIC Sargeant	11
National Trust	11
People's Dispensary for Sick Animals	11
Royal Air Force Benevolent Fund	11
St Christopher's Hospice	11
Water Aid	11
World Emergency Relief	11
Barnardo's	10
Battersea Dogs and Cats Home	10
British Library	10
Cancer Research UK	10
Catholic Agency for Overseas Development	10
Cats' Protection	10
Macmillan	10
Medicins Sans Frontiers	10
Motor Neurone	10
NCH	10
Royal British Legion	10
Royal Society for the Protection of Birds	10
Shelter	10
Sight Savers International	10
Stroke Association	10
Tearfund	10
UNICEF-UK	10
Action for Blind People	9
ActionAid	9
Brooke Hospital for Animals	9
Help the Aged	9
Royal Mencap Society	9
Royal National Institute for Deaf People	9
Royal National Lifeboat Institution	9
Scout Association	9
Norwood	8
Oxfam	8

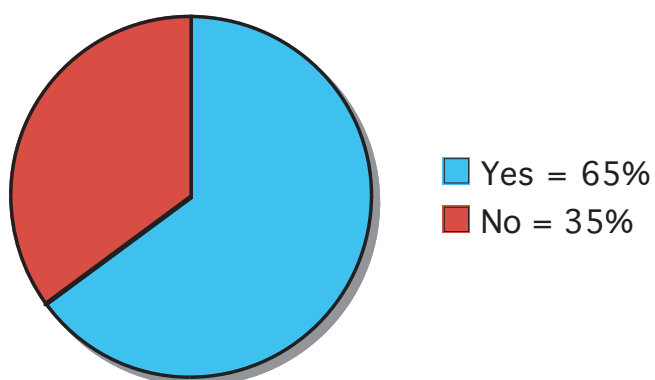
Parkinsons Disease Society	8
Redwings Horse Sanctuary	8
Royal Star and Garter Home	8
Sue Ryder Care	8
Dogs Trust	7
Practical Action	7
Salvation Army Trust	7
Samaritans	7
World Cancer Research Fund	7
WWF UK	7
Association for International Cancer Research	6
Breast Cancer Care	6
British and Foreign Bible Society	6
Donkey Sanctuary	6
National Society for the Prevention of Cruelty to Children	6
Age Concern England	0
Amnesty International	0
Arthritis Research Campaign	0
Birmingham Royal Ballet	0
BMS World Mission	0
British Heart Foundation	0
ChildLine	0
Christian Aid	0
Christie Hospital Charitable Fund	0
Civil Service Benevolent Fund	0
Crisis	0
Cystic Fibrosis Trust	0
Erskine	0
EveryChild	0
Grand Charity	0
Great Ormond Street Hospital Children's Charity	0
JNF Charitable Trust	0
Leonard Cheshire Foundation	0
Leukaemia Research Fund	0
Marie Curie Cancer Care	0
Multiple Sclerosis Society	0
National Deaf Children's Society	0
Oxford Radcliffe Hospitals Charitable Trust	0
Royal Marsden Hospital Charity	0
Royal Society for the Prevention of Cruelty to Animals	0
Save The Children (UK)	0
Scope	0
Scottish Society for the Prevention of Cruelty to Animals	0
St Dunstan's	0
St John Ambulance	0
Variety Club	0
Victoria and Albert Museum	0
Woodland Trust	0

DETAILED RESULTS

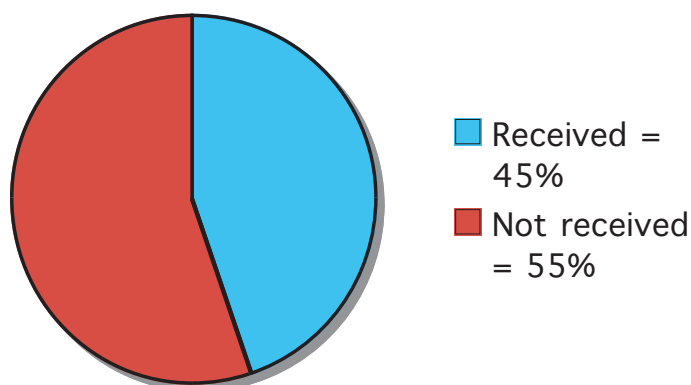
Results, question by question

The following pie charts show the results for each of the criteria for the 60 charities that responded to our request for further information in Stage One of this research.

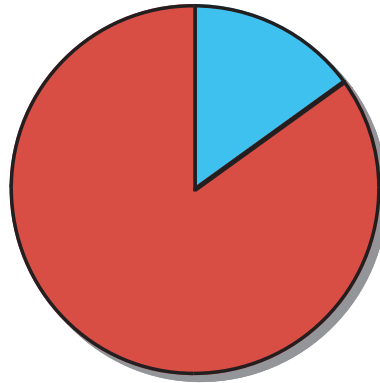
Were the materials received?



Chasing the 35% non-responders

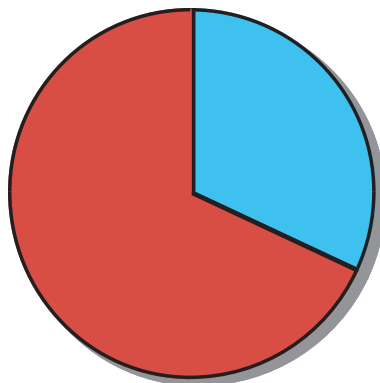


Easily readable throughout



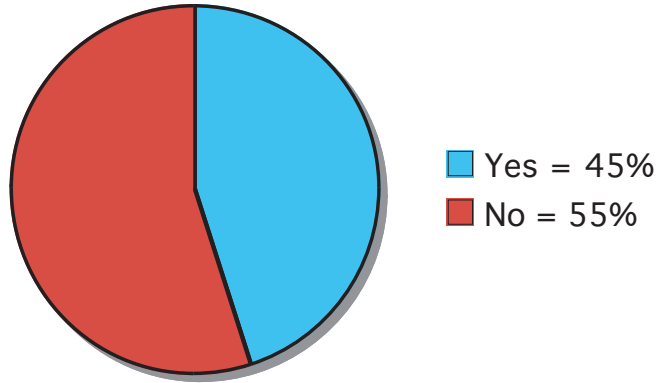
■ Yes = 15%
■ No = 85%

Sufficient point size throughout

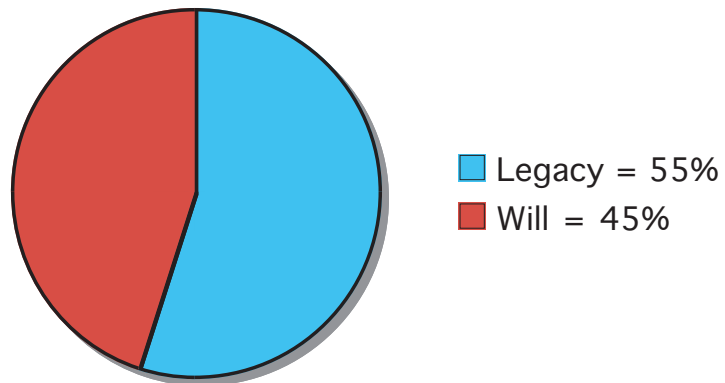


■ 12 or more = 32%
■ Less than 12 = 68%

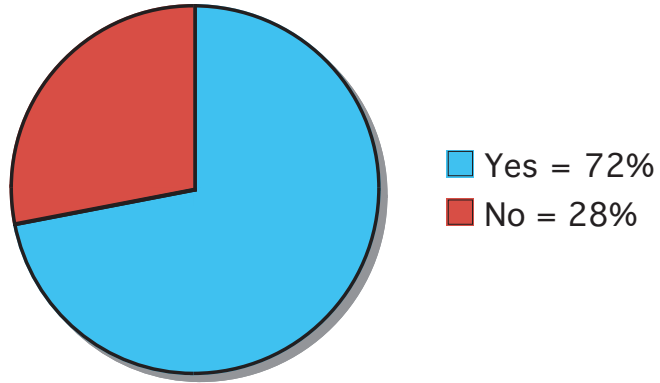
Emphasis on residuary legacies



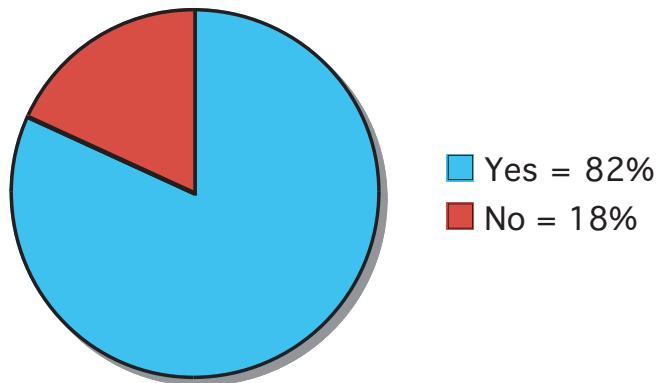
Will or legacy style



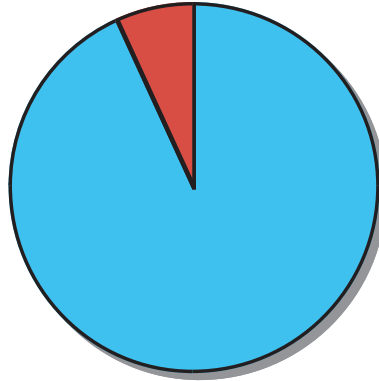
Codicil form enclosed or mentioned



Wording for the Will

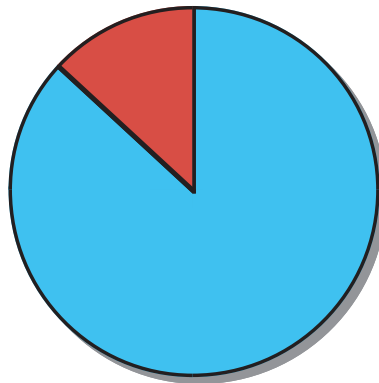


Contact name



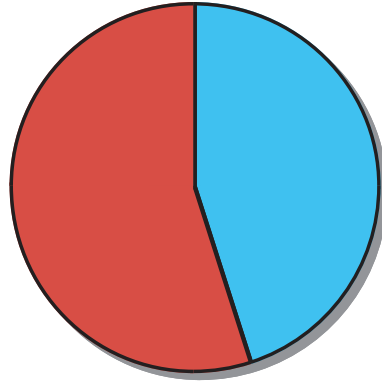
■ Yes = 93%
■ No = 7%

Contact telephone number



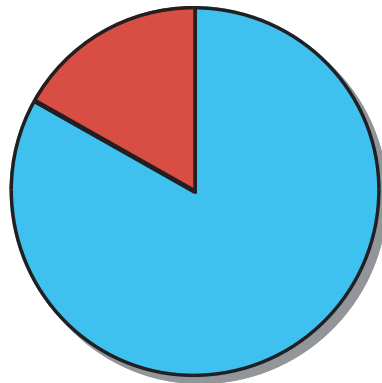
■ Yes = 87%
■ No = 13%

Contact email address



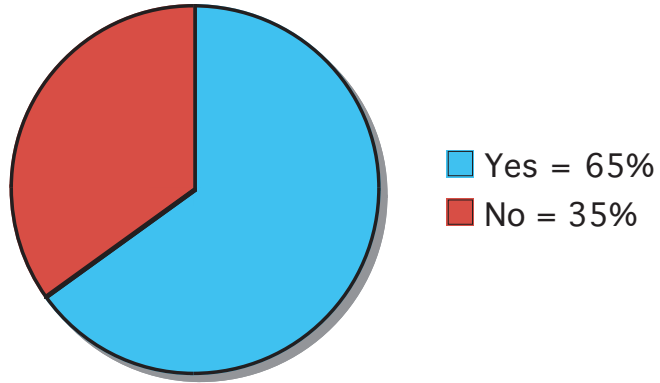
■ Yes = 45%
■ No = 55%

Pledge/response form

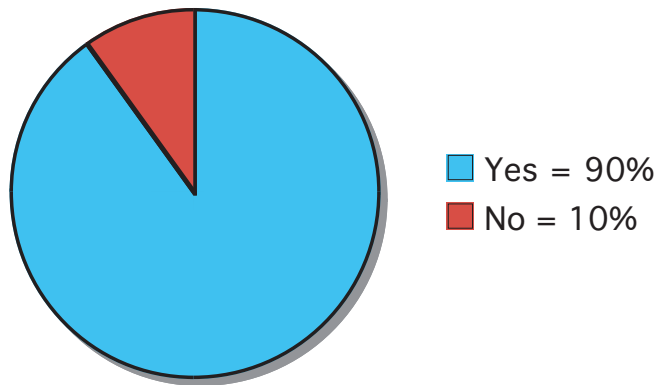


■ Yes = 83%
■ No = 17%

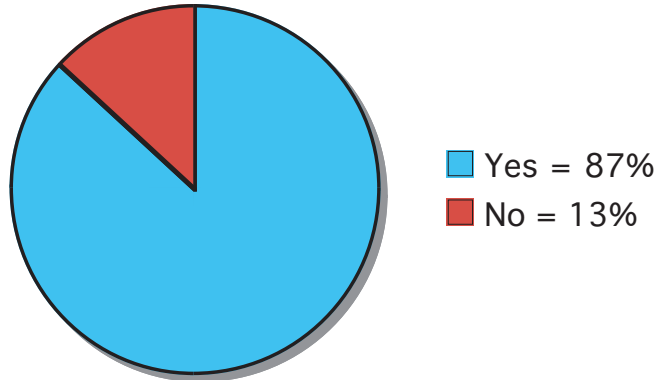
Testimonials or case studies



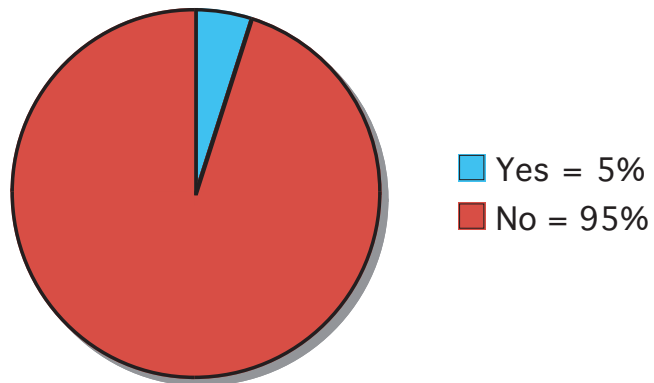
Achievements of the organisation



Pictures of beneficiaries or the organisation's work



Follow up to the original enquiry



OVERALL RESULTS FOR STAGES ONE & TWO

Combining the scores from Stages One and Two, the maximum possible score is 35 points. Congratulations to Guide Dogs for the Blind, whose 29 points put it firmly in the lead.

The first, second and third places, which incorporate the top 5 charities, are as follows:

- 1 Guide Dogs for the Blind Association
- 2 British Red Cross
- 3= Jewish Care
- 3= Macmillan
- 3= UNICEF-UK

Overall ranking

Organisation	Website	Materials	TOTAL
Guide Dogs for the Blind Association	16	13	29
British Red Cross	15	12	27
Jewish Care	14	12	26
Macmillan	16	10	26
UNICEF-UK	16	10	26
Diabetes UK	13	12	25
Motor Neurone	15	10	25
National Trust	14	11	25
Action for Blind People	15	9	24
Alzheimers Society	13	11	24
British Library	14	10	24
Royal Air Force Benevolent Fund	13	11	24
Royal National Lifeboat Institution	15	9	24
Shelter	14	10	24
Sight Savers International	14	10	24
ActionAid	14	9	23
Barnardo's	13	10	23
Church of England Children's Society	12	11	23
Medicins Sans Frontiers	13	10	23
NCH	13	10	23
People's Dispensary for Sick Animals	12	11	23
Royal British Legion	13	10	23
Royal Society for the Protection of Birds	13	10	23
Breakthrough Breast Cancer	11	11	22
Catholic Agency for Overseas Development	12	10	22
National Society for the Prevention of Cruelty to Children	16	6	22

Oxfam	14	8	22
Royal National Institute for the Blind	10	12	22
Water Aid	11	11	22
Cats' Protection	11	10	21
CLIC Sargeant	10	11	21
National Trust for Scotland	9	12	21
Parkinsons Disease Society	13	8	21
World Emergency Relief	10	11	21
Battersea Dogs and Cats Home	10	10	20
Blue Cross	9	11	20
Brooke Hospital for Animals	11	9	20
Redwings Horse Sanctuary	12	8	20
Royal Mencap Society	11	9	20
Scout Association	11	9	20
Stroke Association	10	10	20
Sue Ryder Care	12	8	20
World Cancer Research Fund	13	7	20
Cancer Research UK	9	10	19
Help the Aged	10	9	19
Royal National Institute for Deaf People	10	9	19
Sense	7	12	19
Tearfund	9	10	19
Association for International Cancer Research	12	6	18
Norwood	10	8	18
Royal Star and Garter Home	10	8	18
St Christopher's Hospice	7	11	18
Donkey Sanctuary	11	6	17
Practical Action	10	7	17
Samaritans	10	7	17
WWF UK	10	7	17
Breast Cancer Care	10	6	16
British and Foreign Bible Society	10	6	16
Salvation Army Trust	9	7	16
Dogs Trust	8	7	15
Leukaemia Research Fund	12	0	12
ChildLine	11	0	11
Christian Aid	11	0	11
Scope	11	0	11
Woodland Trust	11	0	11
Crisis	10	0	10
Royal Society for the Prevention of Cruelty to Animals	10	0	10
Arthritis Research Campaign	9	0	9
British Heart Foundation	9	0	9
Civil Service Benevolent Fund	9	0	9
Erskine	9	0	9
Save The Children (UK)	9	0	9
St Dunstan's	9	0	9

Victoria and Albert Museum	9	0	9
Amnesty International	8	0	8
EveryChild	8	0	8
Grand Charity	8	0	8
Marie Curie Cancer Care	8	0	8
National Deaf Children's Society	8	0	8
St John Ambulance	8	0	8
Variety Club	8	0	8
Age Concern England	7	0	7
Birmingham Royal Ballet	7	0	7
BMS World Mission	7	0	7
Cystic Fibrosis Trust	7	0	7
JNF Charitable Trust	7	0	7
Christie Hospital Charitable Fund	6	0	6
Leonard Cheshire Foundation	6	0	6
Multiple Sclerosis Society	6	0	6
Scottish Society for the Prevention of Cruelty to Animals	6	0	6
Great Ormond Street Hospital Children's Charity	5	0	5
Royal Marsden Hospital Charity	5	0	5
Oxford Radcliffe Hospitals Charitable Trust	4	0	4

CONCLUSIONS

An unexpected finding from the research, seen in Stage One and in Stage Two, is the poor level of service from significant numbers of charities. Three months after requesting further information, only 65% of charities had got the materials to us – eventually rising to just 81%, when the remainder were contacted a second time and reminded. That so many seem to be failing in this most important aspect of legacy fundraising is of serious concern.

Some older donors will forgive such poor service, but the increasingly important Baby Boomer cohorts will not. Their expectations are high and for many this experience will cause them to seriously question whether this charity is the best place to leave part of their estate.

Given the huge value of legacies, anyone interested in giving in this way should be given a Gold Standard service. Further information requested via whichever channel should be *received* within a week – and enquiries subsequently followed up to see if there is anything else the supporter needs.

Once they receive the materials, of course, it is of fundamental importance that the information is easy to read. The majority of materials were not.

If your materials need updating, we would urge you to think about the message at the same time. Too often, the opportunity is missed to either sell the benefits of legacies (as opposed to focusing on the mechanics of making a Will), or use the space to emphasise the value of residuary legacies over pecuniary.

Whilst in some cases there is a disconnect between what is said online and what is said in printed legacy materials, there is often a correlation between the shortcomings online and the shortcomings in traditional media. This is most clearly illustrated by the fact that 93% of charities using point sizes less than 12 do not offer a large text option on their websites or legacy pages.

Another correlation to notice is the fact that among the top 50% of charities in Stage One, fewer than one in ten failed to send the requested further information. Contrast this with more than six in ten of the bottom 50%. The correlation seems to be that if you pay attention to the online experience and customer service, it is more likely that good service levels are carried throughout the legacy programme.

Everyone, even Guide Dogs for the Blind, can make simple improvements to printed and digital communications, and to their levels of service. Legacy fundraising is an area that is growing increasingly competitive and no one can afford to neglect it.

CONTACT US

It would be a little unreasonable of us to make such bold statements about the state of legacy fundraising if we did not feel qualified to help our clients promote legacies in an optimum way.

We do, and we have the experience and resources to help you develop and deliver a comprehensive legacy strategy to suit your organisation.

To find out more, contact Matt Parkes: legacies@bluefroglondon.com.

Bluefrog Limited is the UK's foremost charity marketing specialist. We help good charities get even better, whether it's through fundraising or getting people to take action.

We don't chase each new fad or trademarked targeting system. We simply concentrate on making a lasting emotional connection between the organisations we work for and the people who support them. Our approach has been so successful in the UK that we are now working in the USA too.