

Legacy Loop

Finding & Developing Case Studies with Christine Reidy

About me

- Fundraiser 25 years
- Legacy world since 2007
- Past SIG member and Chair of Legacy and In- Mem Special interest group
- First Legacy Garden at Chelsea flower show for NSPCC in 2013
- Became 'Consultant' in 2015
 - Strategy work, training, materials, research, interim management, 'deep dives', mentoring.
 - Happy to help



What we mean by a 'case study'

It is the story of a supporter/staff member/volunteer/beneficiary that can be used in promotional materials. In this case a 'legacy' story



What inspires
your legacy?

"...leaving a legacy to a Catholic charity we respect seemed right. It's an opportunity to do something for others."

Mary and Mike, from Minehead.

Will you celebrate your faith with a gift in your Will to your favourite Catholic cause?



Who are you looking for?

- Someone happy to share their story
- Interesting/relatable/different/compelling
 - One good story is better than ten average ones.
- It could be:
 1. Someone leaving a gift
 2. The story of someone who has died and left a gift
 3. The story of a project/a life/ an outcome that has benefitted from a legacy

Bank of stories



- Build an organisational culture
- Draw a map of your organisation
- Make everyone aware of what you need
- Ideally want a few people identified that are happy for their stories to be told to create a bank
- To get here you need to be a 'detective'
 - Stories are there- I promise
 - Questioning every conversation 'is this someone whose story I could tell?'
 - Ask in comms- tick box on reply form, social media ask, Make a Will Online!

Where have my case studies come from?



- Trustee chats
- Staff leads
- Next of kin visits
- 'pledger file'
- Volunteers
- Events
- Beneficiaries/service users

How to unearth stories?

Spend a few minutes thinking about where you might find stories in your charity



Gaining the story

- Talking to the person
 - Face to face or via phone/internet
 - Think about the purpose of the case study- what are you trying to achieve
 - Record conversation to gain direct quotes
 - Have a 'guide'
- Think about take outs and direct quotes straight after



WHY I LEFT A GIFT IN MY WILL

Ken Hom is one of the world's most respected chefs. He's been an ambassador for Action Against Hunger since 2005 when he hosted a high-profile Chinese New Year Dinner to support survivors of the Asian Tsunami. Since then, he has passionately helped to raise awareness about the issue of child hunger, an area he cares deeply about. Ken has also chosen to mark his commitment to Action Against Hunger with a gift in his Will.

“Being a chef, food has been critical to my career. I was raised by a single mother. We were very poor but no matter how little we had, we ate well and seasonally. Since becoming involved with Action Against Hunger, I have been very impressed by its approach and dedication to tackling world hunger. Because I care passionately about child malnutrition I have chosen to support it through a gift in my Will.”

Typical questions

- Tell me about yourself? Background, job, family etc
- How did you first get involved with (charity)?
- Why did you choose (Charity)?
- What makes this (charity) special/unique to you?
- Is there a particular story/example/memory that you have that sums up what (charity) means to you?
- What made you decide to leave a gift in your will to (charity)?
- What would you like that gift to do/achieve?
- Have you spoken to your family about your plans?



Develop the case study

Alan from The Wirral

***“I want children to
be able to climb trees and explore like I did”***

Says Alan: “I grew up in Surrey and got involved with the Woodland Trust when I dedicated a tree in memory of my Aunt Muriel. She adored the countryside, and woodland in particular, and that inspired me too.”

“This love of the natural world spurred me on to continue my support through a gift in my will. I hope my legacy will help preserve woodland for future generations, so they can climb trees and explore like I did. I know my daughter, who loves the countryside too, will understand and fully support my legacy.”

Gain interview transcription

Think about the core parts of the story

Think about how/where you might use the story

“Use direct quotes”

Go back to person to check accuracy/questions

Once developed check the person is happy



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**I HOPE ONE DAY
 THERE WILL BE
 A CURE FOR
 PANCREATIC
 CANCER."**

Gemma Fell, who chose to remember Breakthrough Cancer Research in her will following the death of her son Charlie in 2015.

**PART OF THE
 CANCER-BEATING TEAM:
 YOU'LL JOIN OTHER
 GENEROUS SUPPORTERS**

Gemma Fell's son Charlie was in his early 40s, a successful journalist and lecturer, when he was diagnosed with pancreatic cancer.

It's one of the most deadly diseases.

Pancreatic cancer is rare, affecting around five in 10,000 people. But 80% of people who have it will die within a year. It's in the top five cancers for death rates. And patients' chances of survival haven't improved in 50 years.

But Charlie knew none of this when he was diagnosed. He and his brother John spent more than two years researching pancreatic cancer – and it wasn't long before they came across Breakthrough Cancer Research.



Just days before his death, Charlie gave a lecture about the need for more research into pancreatic cancer. His message was clear: "We need to create a voice for this deadly disease, and shout loudly if anything is to change." In October 2015, two months after Charlie's death, we created a fellowship in his name to continue vital research.

For Gemma Fell, the fellowship post is a key way to remember her son. But, importantly, she's also decided to leave a gift in her will to Breakthrough Cancer Research.

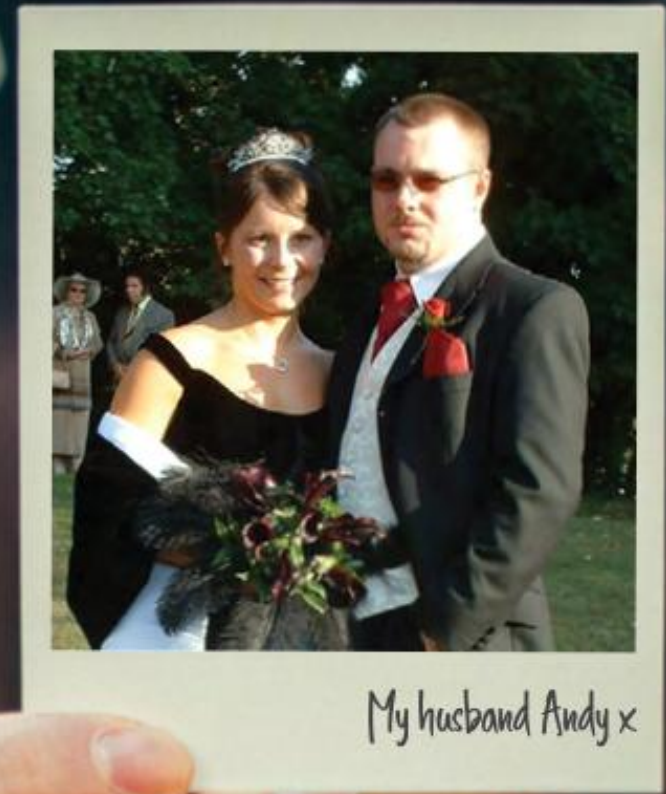
"Pancreatic cancer was new to us, but suddenly we had all these links to Breakthrough Cancer Research and we felt very connected and supported," said Gemma. "I am so grateful for the way Charlie has been remembered through the research fellowship.

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 I think Charlie would have wanted me to leave a gift in my will to this work. I know he remembered Breakthrough Cancer Research in his will. And I hope that one day there will be a cure for pancreatic cancer."

Case study in a legacy brochure

A picture paints a 1,000 words

- Employ a photographer
- Use quality images/video
- Use the image/video to tell some of the story



"It was like an arm had been wrapped around our shoulders."

Christina, mum-of-two, whose husband died.

Help more families receive the best care in their worst times.
Will you leave a legacy to St Elizabeth Hospice?

Gold dust



Questions?