



In-Memory Insight | June 2020

Understanding In-Memory Stewardship



LegacyForesight

In-Memory Insight is an ongoing programme to map, measure and research in-memory giving and fundraising. We work closely with a learning circle of leading charities who agree to pool their budgets, experiences and data to help build evidence and insight.

We know that the desire to honour a loved one who has died – whether they're a family member, close friend or colleague – underlies many types of charity support. The act of giving in memory can be helpful to the bereaved as well as the charity; providing focus or diversion, giving something positive to think about and encouraging mutual support between family and friends. The motivation to give is intimately connected to the deceased and charities must always respect this when communicating with in-memory donors.

In 2019/20 our research aimed to explore **in-memory stewardship** from both the charity and the supporter perspective, and to inform our understanding of what constitutes effective stewardship in this area.

This project contributed further to the foundation of In-Memory Insight research (2011–2019), touching on the subject of stewardship from various angles. It also built on the approach and findings of Legacy Foresight's Understanding Legacy Stewardship project in winter 2018, funded by a consortium of leading legacy charities.

Our approach was extensive – including a survey of member charities, good practice charity case-studies and depth interviews with engaged in-memory supporters – furnishing In-Memory Insight consortium members with fresh insights and practical actions.

This briefing paper gives a synopsis of the key learnings from the supporter research element of the project.

The research proves how important charities' application of good stewardship is to their in-memory fundraising. We hope that this evidence will help make the case for greater, more thoughtful investment in in-memory fundraising throughout the sector. We are grateful to our learning circle members for agreeing to share this information more widely.

Ten key learnings from in-memory supporters

1. In-memory fundraising really *does* matter to supporters

All the supporters we spoke to stressed how positive the experience of fundraising in memory of a loved one had felt – not least in making some good come of a sad situation. Fundraising had united them with friends and family, often at social events that had lifted the mood and made everyone feel closer to the person they'd lost. Sometimes, fundraising was the *only* thing a bereaved person felt they had left and their main way of ensuring their loved one would never be forgotten.

We were reminded that in-memory giving is never a one-way street. Supporters appreciate the experience, the outlet, the reward it gives them and its role in helping them remember.

2. Never forget a supporter's 'why'

One of the most, if not *the* most important concern for supporters was that the charity should always keep sight of their 'why' – their loved one – their real reason for engaging. This was the one thing that united all supporters, whatever their level of interest in the charity's wider work – and the factor most likely to make them support again (or not).

Offering supporters opportunities and outlets to tell stories about their loved one – e.g. through tribute funds or at events – emerged as a key ingredient of good stewardship. Stewardship often felt most magical when the loved one was 'heroised' through their role in funding the charity's work, enabling wonderful things to happen beyond their own life.

3. Embrace (don't resist!) supporters' need for personalisation

As we're reminded time and again in our research, personalisation is a crucial element of in-memory stewardship. The more personal a tribute can be made, the better. Supporters will eagerly adopt personalisation when offered it. In this research, they were found to have personalised the same basic products (e.g. tree dedication) for use in strikingly different ways, reflecting their own needs and the character of their loved ones.

Understanding people's motivations for personalisation helps with meaningful stewardship. If welcomed as an opportunity rather than a problem, personalisation is key to unlocking product design and in-memory offers. In-memory donors can be great product designers!

4. Fundraising can be a journey, with turning points along the way

For some supporters, fundraising had been a definite journey – usually (but not always) starting with the loved one's death, or funeral – with no clear sense of where it might lead.

Even active catalyst donors could start small with limited ambition which grew over time. As they'd flourished in experience and confidence, they'd appreciated it when the charity's stewardship had shifted to reflect this and they felt trusted more to do their own thing.

Typical journeys had highs and lows, instances of euphoria and transformative moments – all great opportunities for the charity to create emotional connections with the supporter.

5. Actions speak louder than words

We found that the most effective stewardship activities conveyed both magic and a clear link with the loved one, heroising them or making them proud 'from beyond the grave'. But in-memory donors also like to feel good in their own right. We found numerous, great examples of small touches (as well as more expansive gestures) that had hit the right mark.

6. Catalyst donors appreciate support *and* flexibility

We found that supporters' needs and expectations of a charity's stewardship did evolve over time. They came to require a combination of support *and* flexibility – and had an increasing desire for ownership of their fundraising. They valued freedom to tell their loved one's story in their own way and appreciated the charity flexing its rules to inspire and encourage them in this. Over time, some active catalyst donors had blossomed into compelling and evangelical advocates, talking about the charity and its work with passion and credibility. Spreading awareness of services had become as important to these supporters as raising money.

7. Tribute funds are powerful fundraising tools

As we have found in other research, tribute funds were very powerful fundraising tools, underpinning a journey and becoming a focal point for action, pulling everything together. Once set up, they became repositories for a myriad of in-memory donations from a wide range of different sources, encouraging and incentivising targets with their high visibility.

Really importantly, funds were happy *places* of remembrance, visited on a regular basis. They had strong symbolic function in encouraging memories of a loved one, and a healing power – helping donors cut through darkness and grief, sometimes even positively transforming their idea of how their loved one was perceived.

8. Charity staff are the key to long and rewarding relationships

We found that staff at the charity had a pivotal role in effective in-memory fundraising relationships – including clinical staff who had often made an indelible impression. Compassion was an essential requirement for both Fundraising and clinical staff. Other qualities that supporters felt to be important to good stewardship included being friendly and approachable; efficient and practical; appreciative and encouraging. Most importantly, fundraisers needed to respect and understand the supporter's 'why'.

The 'best' staff had taken pride in what supporters were achieving and had made sure they'd known this, making them feel great. They had given real consideration to the person behind the fundraising – which was appreciated even more than fundraising competence!

9. Communications must always be sensitive and appreciative

Supporters wanted their charity communications to feel sensitive and appreciative. Among the things they looked out for were **good housekeeping** (personalising and joining up communications, proper - and prompt - thanking, remembering their 'why' and showing them evidence of genuine regard); **personal touches** (e.g. remembering their special dates and anniversaries); and **encouragement** (e.g. taking pride in their achievements, putting their success in context, and materialising the impact of their fundraising where possible). Asking donors to get involved had gone down well – an alternative recognition currency?

10. The power of tangibility and evidence

This research reminded us yet again of the amazing power charities have if they close the gap with supporters and show them the work close up. In-memory stewardship that takes donors behind the scenes, (e.g. service tours), had led to some of the best 'wow' moments. These initiatives take some application and effort. But they can use the charity's assets in a simple, low-cost way that demonstrates impact and the need for support.

In-memory donors have a strong appetite for tangible affirmation of their support which can pose challenges for charities. Digital solutions – delivered with panache – can help here.

More about In-Memory Insight

In-Memory Insight explores the size, shape and scope of in-memory giving in the UK. The programme aims to collect objective evidence and insight on in-memory giving, in order to build the case for investment, inform fundraising strategies and help manage relationships with supporters.

The In-Memory Insight programme is funded by a Learning Circle of leading British charities who agree to pool their budgets, experiences and data to help build our collective knowledge. We operate a rolling research programme, with each year building on the one before.

We define in-memory as “any type of charitable giving or fundraising commemorating the life of someone special”. A range of in-memory motivated activities are covered in our research, including gifts at funerals, direct in-memory donations both one-off and regular, the setting up of ‘Tribute Funds’, the purchase of commemorative objects such as benches and trees, participation in fundraising events such as marathons and bike rides, and legacies made in honour of a loved one.

The programme sets out to explore:

- What motivates in-memory donors to give to charity – and how does it make them feel?
- What do in-memory donors need, expect – and experience – from the charities they support?
- How many/much In-memory gifts are being given? Through which channels?
- What is the current status of in-memory fundraising in the UK?
- What can we learn from good practice examples – both here and overseas?

To answer these questions, we use a variety of research techniques including focus groups and depth interviews, omnibus surveys, good practice case studies, the analysis of performance data from Learning Circle members and interactive member workshops.

For more information on In-Memory Insight please contact Caroline Waters:

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Time to book a Health-Check?

Have you reached a pivotal point with your in-memory fundraising? Are you wondering how to pinpoint exactly where you should be focusing attention and investment?

An In-Memory Health Check from Legacy Foresight could give you the confidence to move onwards and upwards with a sound base of evidence unique to your organisation.

To talk to us informally about your charity's needs, please contact Kate Jenkinson, Head of In-Memory Consultancy: k.jenkinson@legacyforesight.co.uk