Project proposal | September 2020

Legacy Fundraising 2.0: digital and social marketing

LegacyForesight

Introduction

Over the past 18 months we have seen growing interest in using digital and social media as a means of acquiring and stewarding legacy donors. Websites, discussion forums and video channels are accessible to charities of all sizes, whatever their budget; they are also great media for telling stories and encouraging interaction.

This shift has accelerated since the advent of GDPR, restricting direct communications with many potential supporters. It has also been boosted by growth in online usage amongst today's key legacy audience, the boomers.

Baby boomers are avid users of digital and social media, spending on average 27 hours a week online. As well as web surfing, Facebook, YouTube, and online gaming are especially popular, and compared to younger generations they stay on longer, absorb more information and share more links with friends and family. Trust, security, and the quality of the online experience are especially important to them.

Despite the buzz, we have yet to develop an agreed view of what makes for good online legacy communications. How can we best use digital and social media to inspire, inform and impel legacy donors into making a gift? Can we develop KPIs and metrics to help measure and track each charity's performance relative to its peers?

Given the new and rapidly evolving nature of digital legacy marketing, we believe an ongoing programme of research and analysis is needed, based on a 'learning circle' approach. However, to lay the foundations and to create momentum, these proposals are for a one-off pilot project. We are looking for a group of pioneer charities to join us in our exploration.

The challenges digital legacy fundraisers face

In scoping out this research, we asked a cross-section of clients about the issues and opportunities they are facing right now in digital fundraising, Here's what they told us…

"Digital legacy fundraising is the biggest opportunity to come out of COVID-19, but there is an inequality as the strongest brands have the biggest budgets and are dominating this space. There is a lot to explore and unpack here both from the charity and supporter side". (*Disability charity*)

"We are just starting on our digital journey – we don't want to be just reliant on DM. We recently tested social media marketing and got hundreds of leads. We are now trying to work out the quality of those leads – how serious are they? Are they in the right demographic? How do we convert them to leaving a gift?" (*Conservation charity*)

"We use Facebook, but what other mediums, approaches should we consider? How do we design a digital journey?" (*Conservation charity*)

"it's a new way of talking, and a new audience. What do supporters respond to? What triggers action? How do we measure our success?" (*Health charity*)

"We'd like to focus on legacy webpages - best/worst examples, what works and what doesn't " (*Conservation charity*)

"We need a lot more evidence to prove it's worth us doing D&SM. And to get space on the website/in campaigns, in competition with other teams who have much shorter payback periods. It can be hard to measure, and we don't have huge budgets". (*Animal charity*)

"We need to understand how to engage people using digital – boomers have high and rising expectations and it's a crowded space – so we have to stay ahead" (*Disability charity*)

"Digital has been a big part of our marketing push over the past two years. We need to understand more about the people who are engaging with us on digital – their demographics and intentions. What do we do with them after recruiting them through digital? Also, how to do virtual stewardship events well – a major thrust for us now! And to know what the return on investment is, and how long will it take?" (*Disability charity*)

"This is something we are struggling with now. Our attention is on acquisition – but the metrics we have adopted from IG may not be right for legacies. What is the best way to use digital for lead generation, branding and supporter stewardship?" (*Development charity*)

"We need to understand how we can improve our supporter journeys through incorporating online/offline channels. What are the preferred ways of contact for our audiences?" (*Development charity*)

" I like the idea of learning together in a learning circle - having an evidence base to dip into when I need it. We would also want to engage our digital teams in the process" *(Animal charity*)

Issues to explore

Legacy Fundraising 2.0 sets out to assess how best to use digital and social media to raise awareness, acquire new legacy donors and steward existing supporters. It will explore a number of themes:

- Current practice in digital and social legacies. What is the current status of digital legacy fundraising across our learning circle members? Which channels and platforms are being used? And which are under consideration? What seems to work best, and why? How much is being invested in digital and social marketing in terms of staff and spend? And how does this compare to other legacy fundraising activities?
- Understanding digital donors. How are British consumers currently using digital and social media, to engage with organisations in general and charities in particular? What do they currently do/feel when it comes to gifts in wills? For example, the search terms used, intermediaries consulted, platforms considered. Crucially – how do behaviour and attitudes vary across generations? What does this mean in terms of your key target audiences, the boomers and war babies? And – given their wholehearted use of digital and social media – how much should you invest in targeting younger groups online?
- Innovative platforms and approaches. Where next for digital and social marketing, and what does this mean for our target audiences? We hear about fundraisers increasing use of TikTok, Tiltify, Twitch, Alexa/Siri, gamification, virtual reality, co-creation tools etc etc – but how applicable are these technologies to the boomers (much less the war babies) ? How soon – if ever - will these platforms become mainstream? And more generally, are there lessons can we apply from innovations in other sectors, and other countries?
- Building digital skills and buy-in. According to the latest Charity Digital Skills report (2020) digital development across the charity sector is being held back by a lack of funding, skills and confidence. Furthermore, in a competitive internal arena, legacy managers talk of their struggles to get sufficient space online, or to engage effectively with their digital teams. How can we build our skills and expertise, to drive digital legacy momentum?
- Measuring success. There's a myriad of KPIs and benchmarks out there, but most are based on more immediate forms of sales or fundraising. What measures make sense on our protracted legacy journey? And how can we prove the return on investment in digital and social legacy fundraising, to help make the case for more spend?
- Spotlight on specific legacy fundraising activities. In addition to these overarching issues, there are many questions relating to good practice in particular digital channels to be discussed as the programme progresses, such as:

  Facebook advertising

  Legacy web pages

  Email marketing

  Display and search advertising

  Video and virtual reality

  Online will-making

  Virtual supporter events

  Working with intermediaries and influencers

The Learning Circle approach

A learning circle is an ongoing programme of research, analysis and discussion around an important fundraising theme. It is funded by a group of charities who agree to pool their budgets, experiences and data to help build evidence and insight.

Compared to a one-off research project, a learning circle involves more extensive member interaction, through a series of workshops (whether virtual or face to face), charity case studies and online discussion forums. All past research findings and workshop notes are stored in a password-protected project area on the Legacy Foresight portal, accessible whenever required. Over time, we look to develop tools and templates which fundraisers can take back to their own teams.

As well as providing stimulus ideas and objective evidence, Legacy Foresight's role is as facilitator and convener. We work closely with a programme steering group to ensure the approach and the findings meet our clients' needs.

Our best-known Learning Circle programme is In-Memory Insight, which explores the size, shape and scope of in-memory giving in the UK. We collect hard evidence to inform in-memory fundraising strategies and convince senior management of the value of in-memory giving. The programme has been in operation since 2011, focusing on a new research theme each year.

Over the past ten years, we have used a wide range of research methods, including:

Desk research – to uncover important underlying issues to explore in our own research, and to identify existing sources and experts to draw upon

Expert panels – to stretch and challenge our thinking, including inviting key experts to attend project workshops

Focus groups and depth interviews – to understand donors' motivations, experiences and expectations

Consumer surveys – to track the incidence and value of in-memory giving by method

Social listening research – to uncover the key topics, emotions and behaviour driving online conversations around in-memory giving

Best practice and case studies – to establish the current status of in-memory marketing in Britain, and to find the most innovative and effective strategies

Benchmarking – to measure the funds raised from in-memory donors by the charities in our consortium, and the resources invested in in-memory marketing

Group discussion – bringing charities together to share issues and ideas

Over time, we envisage a similar approach for Legacy Fundraising 2.0. But first, we need to lay the foundations, by collecting evidence on the current scope and future potential of digital legacy fundraising and conducting research into the profiles and behaviour of legacy donors in the online environment.

Proposals for the first six months

These proposals are for a six month project, which will provide important insights in its own right, as well as – we hope – kick-starting an ongoing learning circle programme. This project will address some fundamental questions, laying the foundations for future work by:

1. Assessing the current status of digital and social fundraising amongst our consortium group, based on an online member survey to capture current activities, resourcing, KPIs and challenges

2. Mapping the overall digital and social landscape – now and into the near future (i.e. next 3 years), based on desk research and conversations with sector experts.

3. Understanding how potential legacy donors currently use digital and social media to find information and inspiration on legacy giving, based on original social-listening research (see below for more information)

4. Identifying the key differences by generation, focusing on war babies (75+), core boomers (62 -74) and shadow boomers (55 – 61), again based on original social listening research (see below for more information)

5. Two consortium workshops to share ideas and experiences, scope the research and discuss the findings

Project timetable

October 2020: Desk research, expert interviews and member survey

November /December 2020: First Learning Circle workshop and Steering Group meeting to confirm project scope, priorities and outputs

January/February 2021: Social listening research

We will commission a 'social and digital media listening' project, to map and analyse the conversations taking place in social and digital media around legacy giving. The work will be carried out by Ventura Digital, who we worked with on the 2016 In Memory Insight project on the use of social and digital media in memory. The analysis will include

- Overall platform behaviour across social media, blogs, forums, news websites etc
- Demographic analysis – evidence of how different cohorts interact with fundraising/ donation and associated content online, and how those behaviours have changed over the past 3 years
- Search behaviour – what type of information/topics are legacy donors searching for online?
- What are the key search terms used for content related to legacy donations, and how have these changed over time?
- What influencers and/or brands are the key drivers of online discussion and interaction? (e.g. Moneysaving Expert, Which?)
- What are the key topics of conversation across discussion-based platforms (e.g. forums, social media etc)?
- What websites are they interacting with when searching for and consuming legacy donation related content?

March 2021: Second Steering Group meeting and Learning Circle workshop to discuss conclusions and implication for charities and agree next steps

April 2021: Circulation of final reports and development of proposals for the next phase of the Legacy Fundraising 2.0 Learning Circle

Project outputs

We will produce three interim reports summarising key messages from the member survey, desk research/expert interviews and the social listening research. These reports will be circulated before the workshops, to allow plenty of time for discussion rather than presentation.

The final results will be produced as a PowerPoint-style report and an executive summary for circulation to the wider client team,

Tailored presentations at client offices can be arranged for an extra cost.

Cost per charity member

£2,500 - £3,500 (+VAT) per charity depending on levels of sign up.

Standard invoice date will be Monday 5th October, but we are happy to invoice between 1st September 2020 and 1st January 2021 if required.

Project management

As always, we plan to recruit a sounding board of 4-5 people to provide feedback and suggestions on the work as it develops, assure the quality of outputs on behalf of the consortium, and agree on the final dissemination of findings. The sounding board will meet 'virtually' at least twice: to agree the social listening research specification; and to discuss the emerging project conclusions.

If you would like to be considered for the sounding board, please let us know when you confirm your participation in the project.

Next steps

- Deadline for sign-up: Monday 28th September 2020
- Confirmation of final consortium and cost per charity: Friday 2nd October 2020
- Project kick off/invoice: Monday 5th October 2020

To express your interest or for more information contact Meg Abdy: m.abdy@legacyforesight.co.uk

Key team members

Meg Abdy

Project Direction

Meg has been analysing the legacy market since 1994, when she coordinated the first ever legacy forecasting project, now known as Legacy Monitor.

Today she is responsible for programme management and business development at Legacy Foresight, with interests in in-memory giving, international markets and donor research. Meg regularly speaks at charity conferences and her view on the future of the sector is frequently featured in the third-sector press.

These days, Meg lives on the edge of the North Yorkshire Moors, where she and her husband run a 3 acre smallholding, including 3 sheep, 24 hens and a very bossy cockerel!

Sue Pedley

Research Leader

Sue is responsible for in-depth consumer research at Legacy Foresight and has considerable experience of clients in both the private and charity sectors.

She has worked with Legacy Foresight since 2007, on the original Baby Boomers project (Living Forever: Baby Boomers and Legacies, 2007) and the subsequent updates (2010/2014/2019). Since 2011 she has also facilitated focus groups and depth interviews for the In-Memory Insight programme as well as master-minding the Invisible Legator, Understanding Legacy Stewardship and Charitable Wills in the 21st Century projects.

Sue's previous voluntary sector clients include Parentline Plus, NCVO, the Charity Commission, NSPCC and WWF UK. She has an MBA from Kingston University.

Outside work, Sue is a mad keen salsa dancer, dancing around Surrey 2-3 nights a week

Dr Claire Routley

Research and Workshop Facilitation

Claire has worked in fundraising since the early 2000s, specialising in legacy fundraising for more than a decade.

In 2011, she completed a PhD looking at why people choose to leave legacies to charity. She has worked for Bible Society, Age UK, WRVS and a local hospice, and is a tutor for the Institute of Fundraising's qualification courses. She is now a fundraising consultant, and a leading researcher in the field of legacy giving. She is also a member of fundraising think tank Rogare's international advisory panel, and in 2017, was named AFP's emerging scholar.

Claire is head of Legacy Consultancy at our sister company Legacy Voice. She has a growing interest in digital legacy fundraising, and presented on emerging trends at last year's Institute of Fundraising Legacy Conference.

Caroline Waters

Project Management

Caroline is a strategic project manager with a track record in managing successful projects and initiatives from micro to major impact.

Caroline established the Alumni and Development Office at the University of Suffolk, where she experienced first-hand the impact a legacy can have on an organisation. She has previously dedicated her career to bringing a University to Suffolk where she formed part of the initial team of three and worked across many key roles during the institution's rapid growth. Leaving a thriving University in a county which has been waiting for over 500 years for one is a proud achievement!

At Legacy Foresight Caroline supports our varied consortium research programmes and contributes to the successful collaboration of members. She also utilities her skills of joining the dots and nurturing relationships in her roles as a charity trustee and school governor.

In her spare time, she is a pilates lover, amateur runner, passionate baker and chief taxi driver for her two daughters.

Madeleine Sugden

Project Advisor

Madeleine is a digital specialist with over 20 years of experience in digital and charity communications.

As a consultant since 2020, she supports charities with their digital activity – from day to day comms to strategic planning and culture change. Her work typically starts with analysis of digital channels, leading to deeper reviews of internal processes and priorities. She understands how organisations work, and she helps them to address their resources and culture.

Madeleine is a trainer, researcher, advisor and mentor as well as a writer, editor and manager of day to day comms.

Ventura Agency

Social Listening Research

Ventura Digital are a data-driven performing marketing agency that specialise in social listening analytics to drive decision making. They use a consultative approach, helping provide the best methodology, tools and team for deriving insights from online content to answer key business questions.

Their team of in-house social analysts are experts in social media listening and analysis across online content and datasets utilising quantitative and qualitative analysis to develop actionable insights.

Relevant insights and recommendations can only be developed using social listening when someone understands not just the business question – but the culture and context of the data and conversations. Ventura are knowledgeable about the platforms and data available from each platform and use social listening platforms and technology to help gather data efficiently.