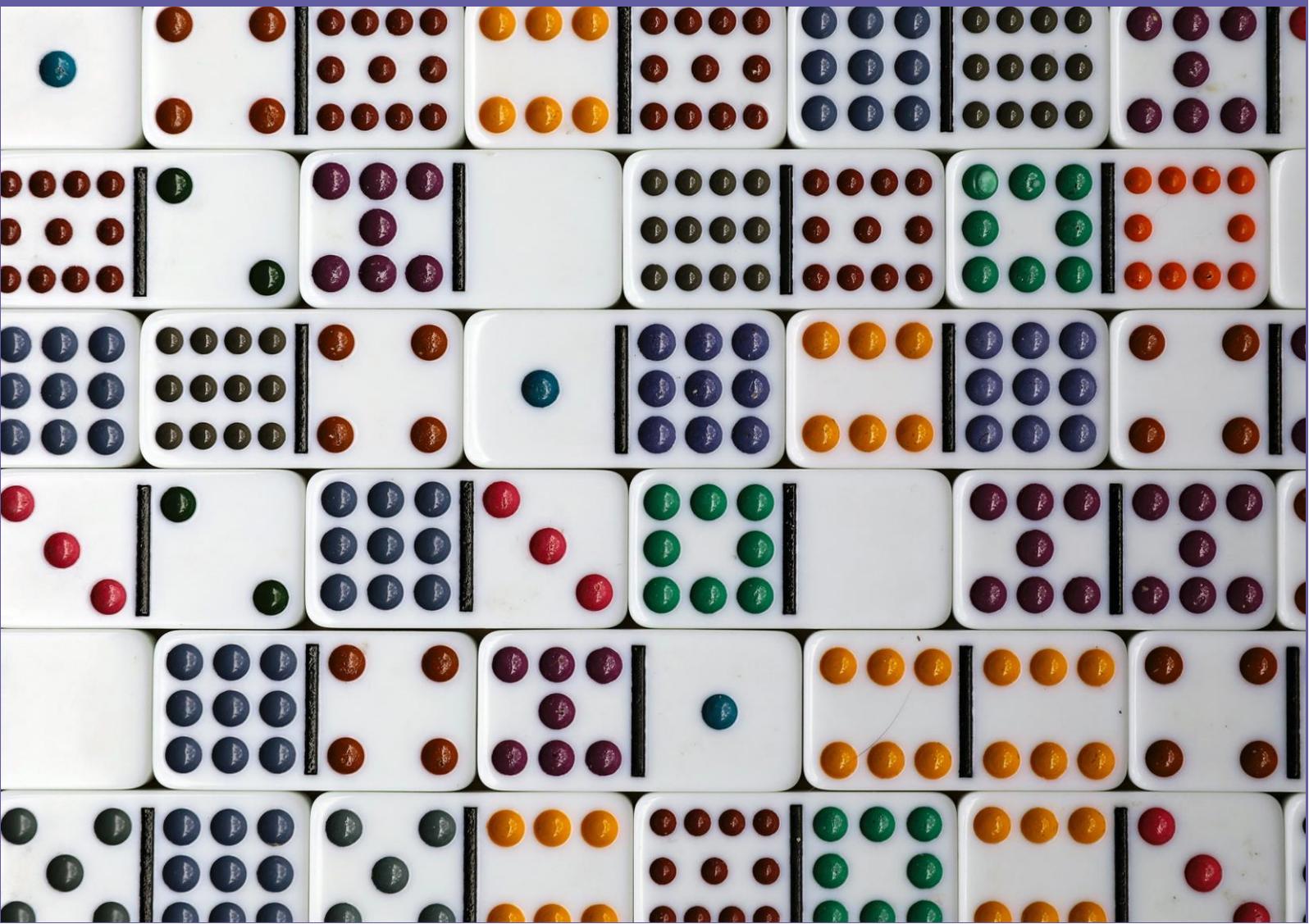


Legacy Monitor Programme 2023

Benchmarking

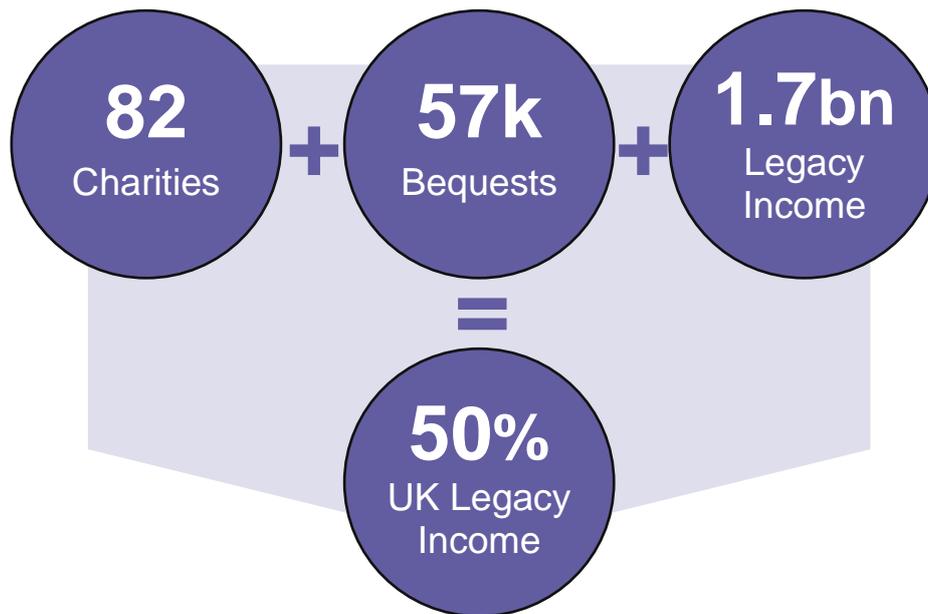
01 October 2022



Legacy Monitor 2023

Legacy Monitor is a consortium programme to benchmark, analyse and forecast trends in legacy giving. Performance data drawn directly from our members' legacy management systems are combined with big picture economic and social trends to create an in-depth analysis of the British legacy sector.

Access in-depth analysis of the British legacy sector



Consortium membership can help you to:

1. Keep up to speed with the very latest trends

“Approachable experts, accessible data and valuable insights”

2. Assess your performance against the market

“It helps shape our legacy income forecasts and legacy marketing. Invaluable”

3. Inform fundraising strategies and budgets

“Approachable experts, accessible data and valuable insights”

4. Feed into income forecasts and targets

“Legacy Foresight is not just another supplier – very much a partner”

5. Raise internal awareness of key market drivers

“You don't get this depth of data in any other part of fundraising”

6. Shape collaborations with other charities

Consortium membership includes

- **Legacy Barometer** the latest quarterly indicators for each consortium member
- **Legacy Market Review** an in-depth analysis of current and future trends
- **Charity Healthcheck** analysis of your benchmarks versus the market & your peers
- **Consortium presentation** with PowerPoint slides for your future use
- **Executive Summary report** written for senior managers and trustees
- **Legacy Monitor secure website** including a suite of interactive charting tools
- **A personalised presentation** to your team for a modest additional cost

About our members

The wide range of members ensures that all sectors, ages and sizes of charity are well represented. From super-brands to rising stars, our consortium covers over half of all UK legacy income.

For the full list of members please contact Caroline Waters c.waters@legacyforesight.co.uk

How the programme is managed:

- **Detailed findings** of the Legacy Monitor programme including all benchmarking data are confidential to consortium members
- **A Steering Group** drawn from consortium members oversees the direction of the programme, providing feedback on the work as it develops and assuring the quality of outputs
- **Quarterly press release** the 'Legacy Bulletin', highlighting top-line findings for the consortium overall
- **Annual summary report** made available to charities and opinion-formers across the sector

Joining the Consortium

The Legacy Monitor programme operates on an annual cycle, which runs from January to December.

Invitations to join the 2023 consortium will be held open until the end of November 2022.

The standard 2023 Legacy Monitor service costs **£5,000+VAT**.

New joiners are being offered a 50% discount in their first year, paying just **£2,500+VAT**.

Subscribers will be invoiced by Legacy Foresight for the full years' service on 1st January 2023.