

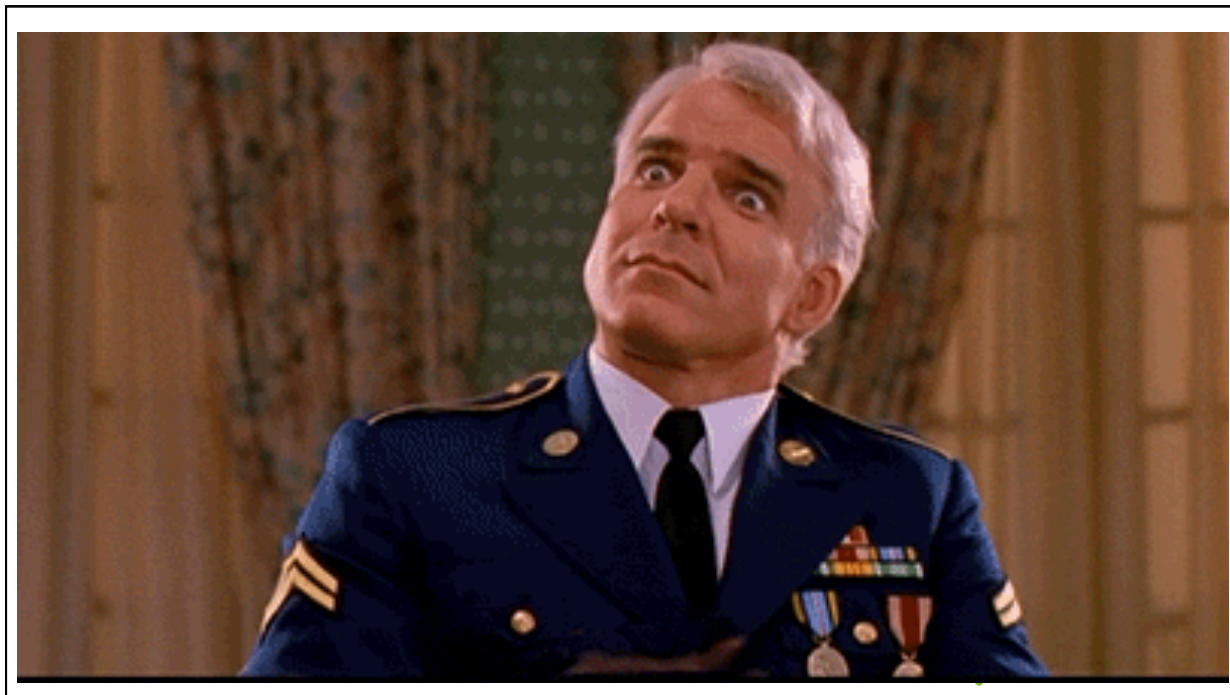
## Working and Embracing Your Legacy Pipeline



**Ligia Peña, M.Sc., CFRE**  
Global Legacy Manager  
[ligia.pena@greenpeace.org](mailto:ligia.pena@greenpeace.org)

 @ligiafpena

**GREENPEACE**



## A Few Facts

- Number of people leaving gifts is going up (UK) from 12% in 2007 to 17% in 2016
- Normalization of legacy giving
- Our job is to make it even more normal
- Emotional act – it's not about death as you have to be alive to leave a legacy gift. The emotion is where the story is.

**GREENPEACE**

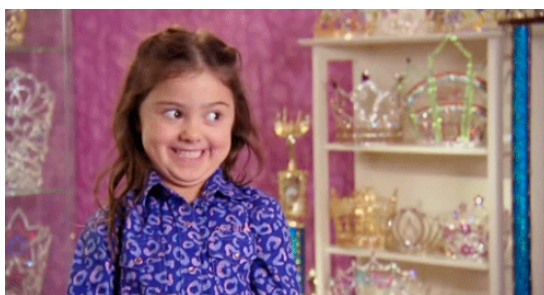
## A Few Facts

- Main barriers to leaving a gift – family first, never thought of it, not the norm – not something people like me do, think it has to be large, fear of changing circumstances.
- Our job is to address these barriers – eg after you've taken care of your family think about leaving us a gift.
- Normalize smaller gifts
- Must talk about impact of legacies – to create the emotional reaction and get them thinking about what they leave behind

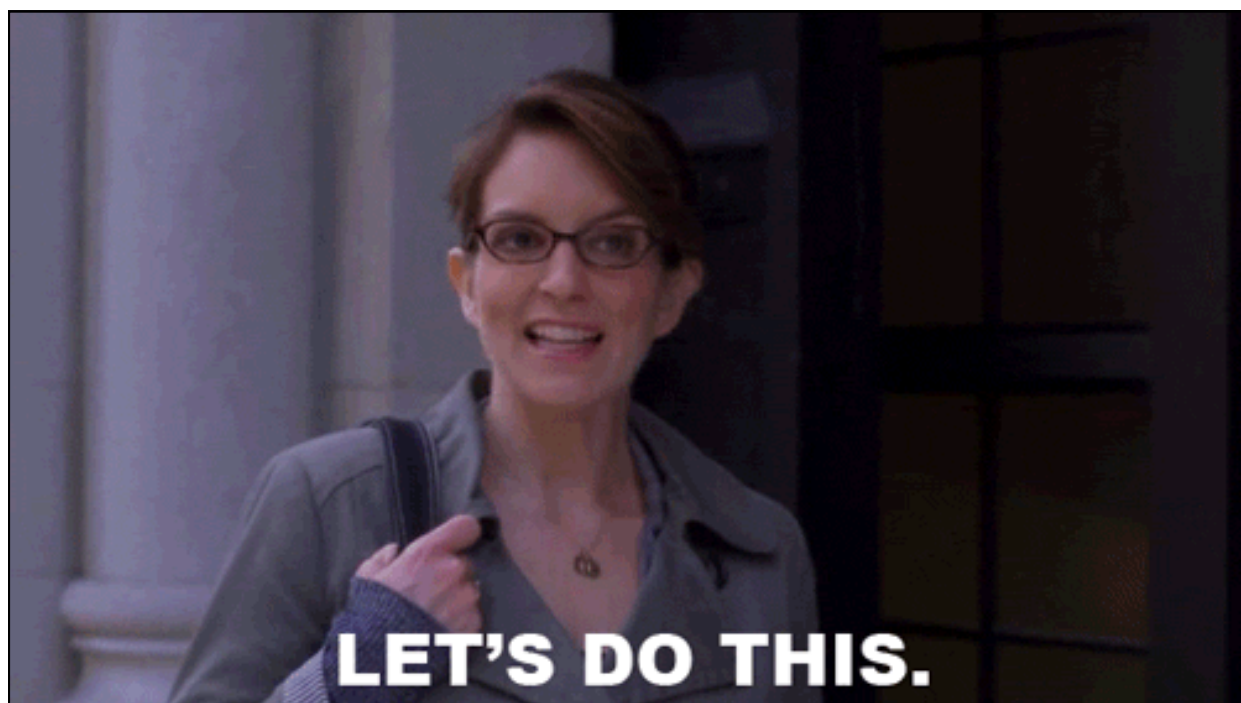
**GREENPEACE**

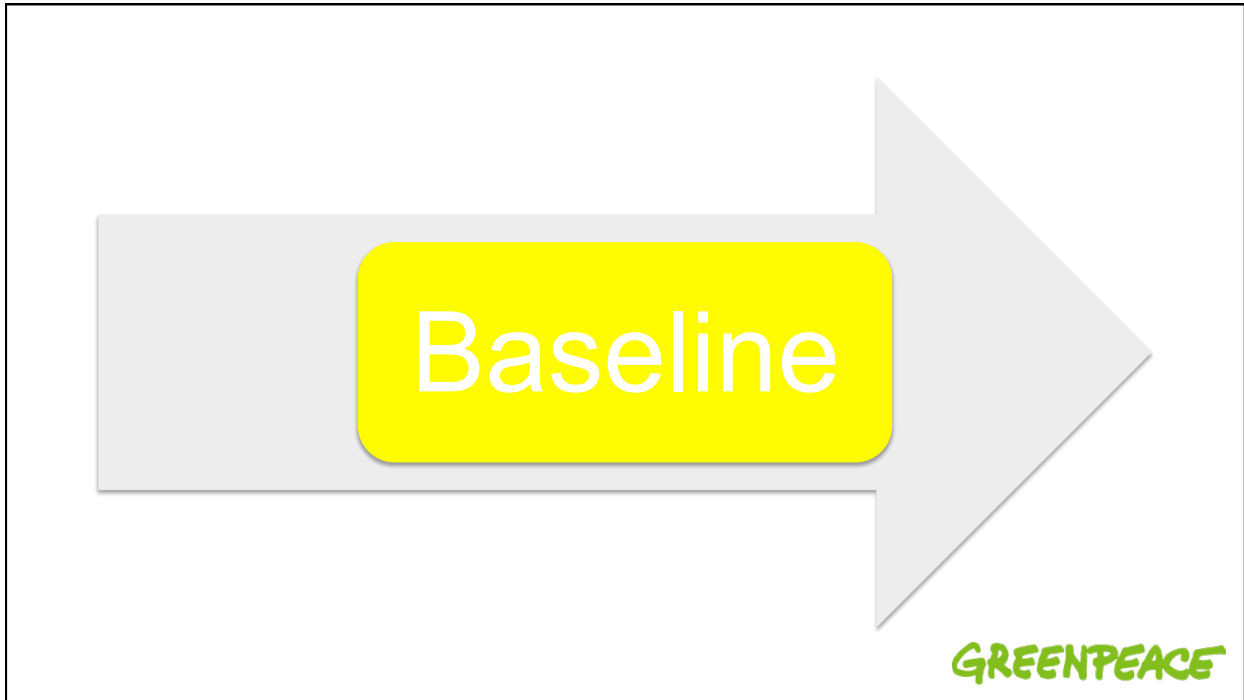
## ● Why Should We Care?

- ✓ The biggest wealth transfer from one generation to the next
- ✓ Expected at \$46 billion
- ✓ Imagine receiving just 0.1% of that !



**GREENPEACE**





## ● Your Baseline

**Definition:** Any supporter, financial or non-financial, who has the potential to be interested in making a legacy gift.

**Key feature:** Drip, drip, drip messaging

- Bequest Prospect Workbook (xls)

**GREENPEACE**

**Questions**

**Answers**

Organization Name	
What was the year your organization was founded?	

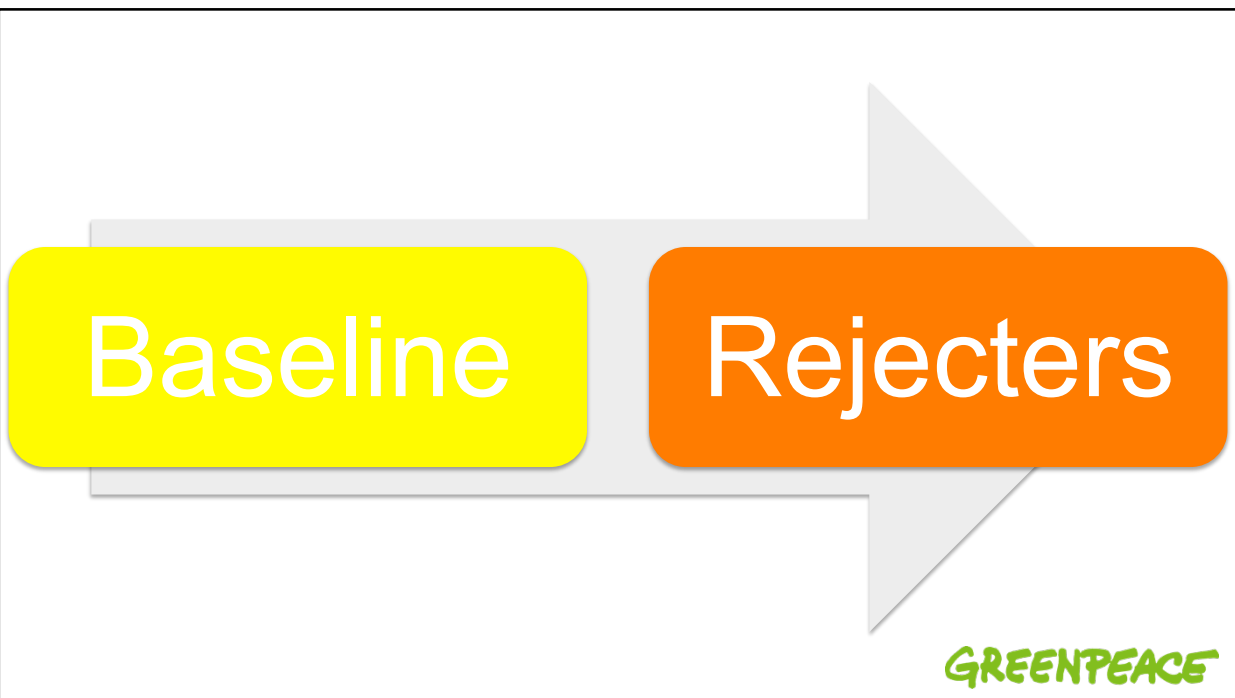
Length of support	Length of Support	Length of Support	Length of Support 5-	
	25 years+	15-25 years	15 years	Less than 5 years
How many active supporters do you have (any financial or non-financial) that have supported you for the following lengths of time?				
Of these, how many have you contacted directly about bequests (not general newsletter activities - direct bequest promotion only)				
How many financial supporters (giving within 2 years) do you have in each category?				
Of these, how many have you contacted directly about bequests in the last 3 years (not general newsletter activities - direct bequest promotion only)				
Do you have any barriers (eg database issues) to understanding the length of length of support in your organization?	Yes/ No			
If yes, what are the key barriers?				

Age	Age 75 years+	Age 65-75 years+	Age 55-65 years	Age 45-55 years	age under 45 years
	How many active supporters do you have (any financial or non-financial) activity in the last 5 years?				
Of these, how many have you contacted directly about bequests (not general newsletter activities - direct bequest promotion only)					
How many financial supporters do you have? (giving within 2 years)					
Of these, how many have you contacted directly about bequests in the last 3 years (not general newsletter activities - direct bequest promotion only)					
Do you have any barriers (eg database issues) to understanding the age of your supporters within your organization?	Yes/ No				
If yes, what are the key barriers?					



In small groups and using post its:  
?? Write ways in which you can start the legacy  
conversation with your supporters.

**GREENPEACE**



**GREENPEACE**

## ● Legacy Supporter Journey 1 - Rejecters

**Definition:** Supporter has been approached for a legacy gift and has declined

**Key feature:** use of mass-marketing approach

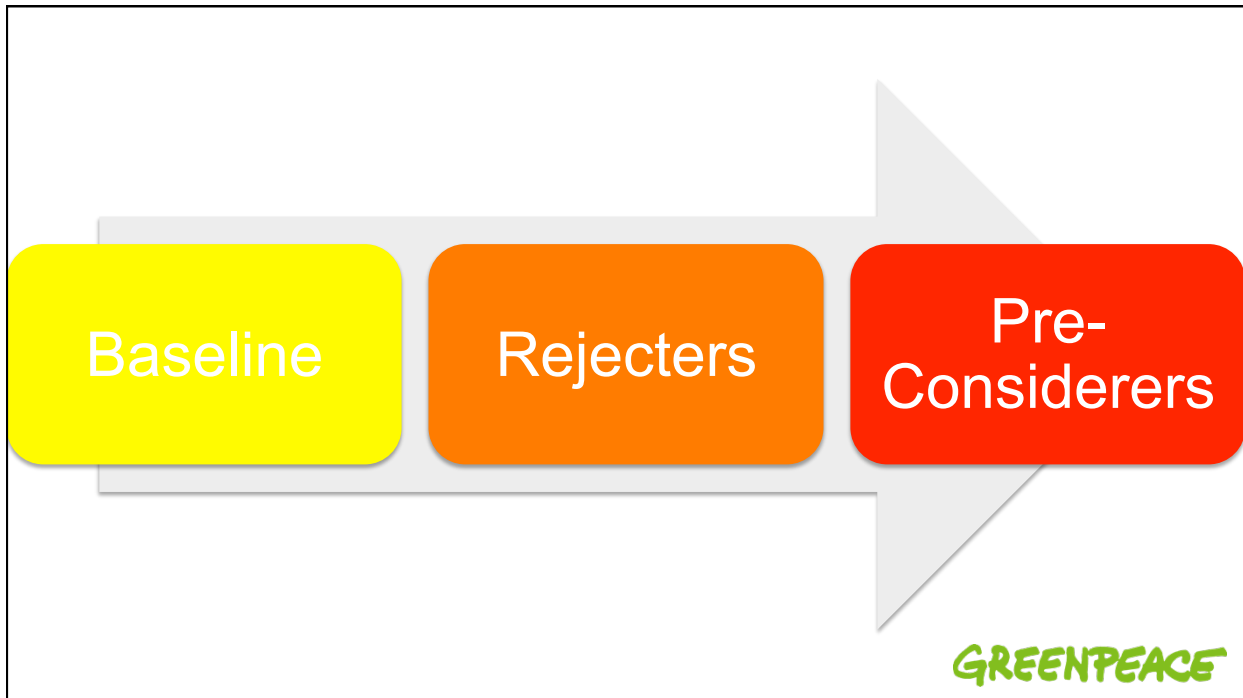
- Beginning of the relationship

**GREENPEACE**



In small groups and using post its:  
?? What do you do with rejecters

**GREENPEACE**



## ● Legacy Supporter Journey 2 – Pre-Considerers

**Definition:** I'm unsure if I would consider leaving a gift to (organization) in my will but I'm aware of it OR please contact me later, I'm not ready right now

**Key feature:** use of mass-marketing approach

- Beginning of the relationship

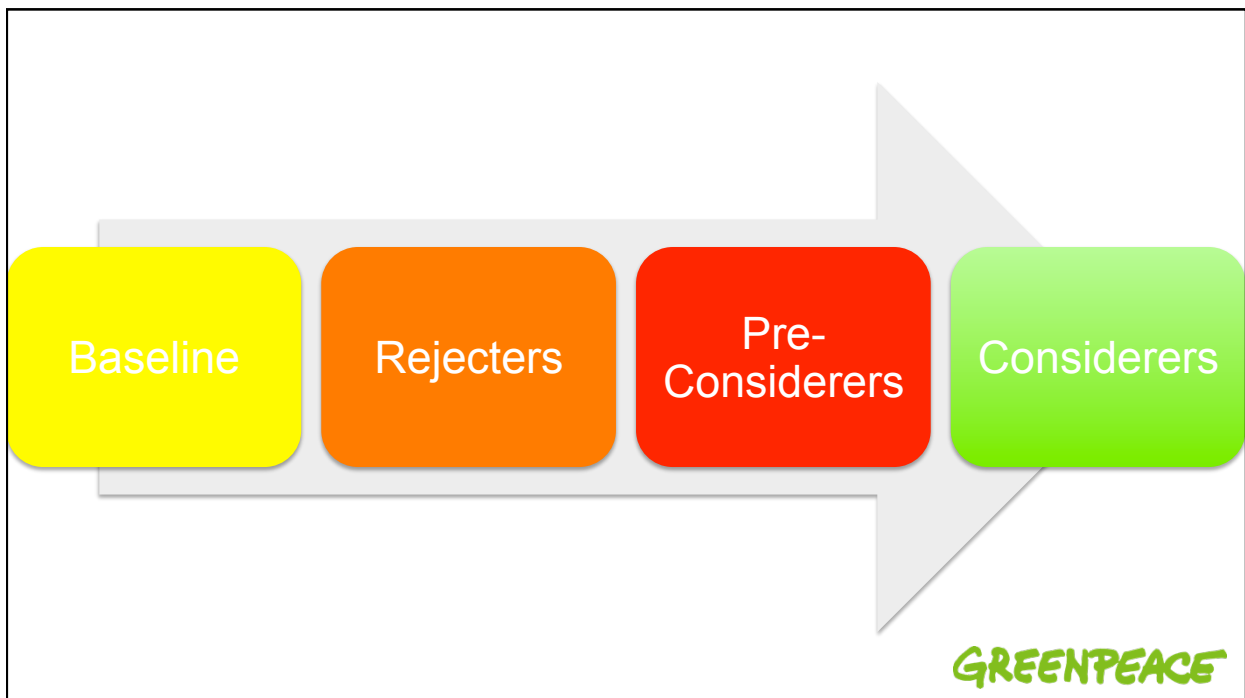
GREENPEACE





In small groups and using post its:  
?? How do you respond your donors' response?

**GREENPEACE**



**GREENPEACE**

## ● Legacy Supporter Journey 3 – Considerers

**Definition:** Anyone who has requested information or has indicated that they are considering leaving a legacy

**Key feature:** use of mass-marketing approach

- Beginning of the relationship

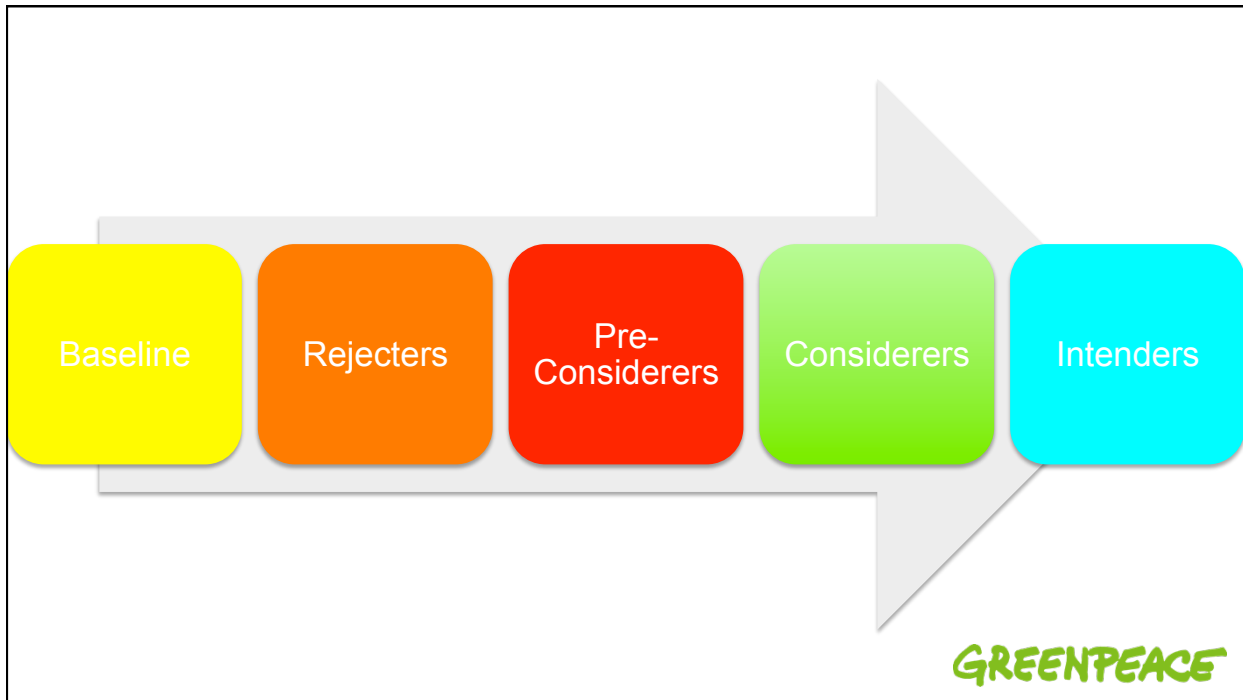
**GREENPEACE**



In small groups and using post its:

?? How do you engage donors to move them to the next stage?

**GREENPEACE**



## ● Legacy Supporter Journey 4 – Intenders

**Definition:** Supporter has indicated they intend to leave a legacy to Greenpeace and/or is actively discussing the details with family members or professional advisors

**Key feature:** personalized, one-on-one approach

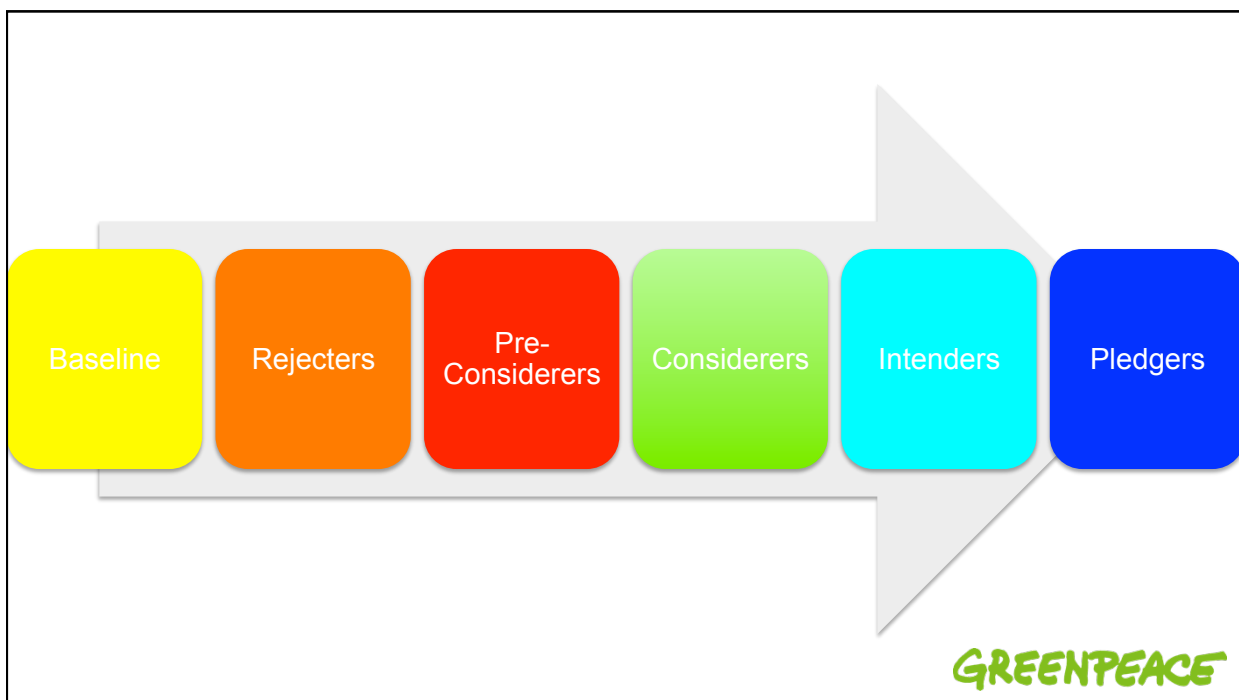
- Strengthening of the relationship

**GREENPEACE**



In small groups and using post its:  
?? How do you help donors to move forward in  
their decision to leave you a legacy gift?

**GREENPEACE**



**GREENPEACE**

## ● Legacy Supporter Journey 5 – Pledgers

**Definition:** Supporter confirmed they have left a legacy to your organization

**Key features:**

- Personalized, one-on-one approach
- Meaningful recognition
- Risk of Will change

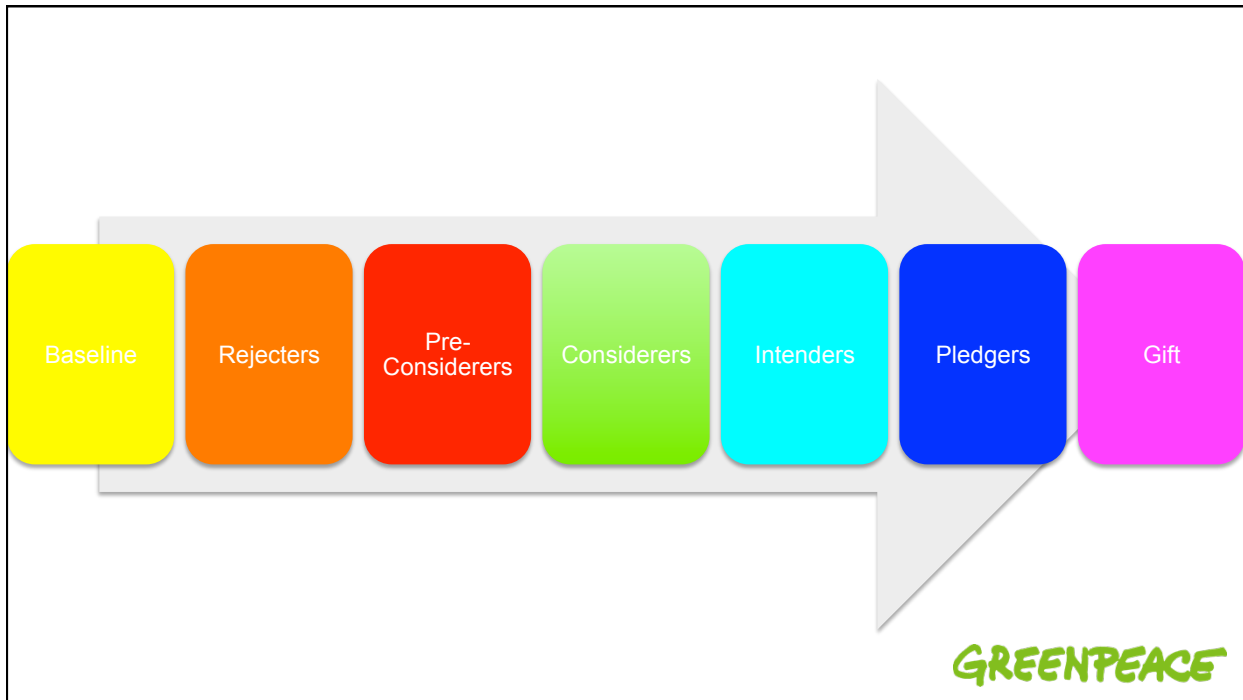
**GREENPEACE**



In small groups and using post its:

?? How do you recognition and further engage donors?

**GREENPEACE**



● **Legacy Supporter Journey 6 – Gift**

**Definition:** Supporter has passed away and the gift has been received or is expected

**Key feature:** reporting and impact

**GREENPEACE**



In small groups and using post its:  
?? How do use this gift to leverage more  
pledges?

**GREENPEACE**

## ● Some Books You May Like

- *Inside the Brain of the Bequest Donor* by Dr. Russell James
- *Why legacies are brilliant for charities and how to get them* by Richard Radcliffe
- *The Philanthropic Planning Companion* by Brian Sagrestano & Robert Wahlers
- *Donor-Centered Planned Gift Marketing* by Michael J. Rosen

**GREENPEACE**





	Baseline	Mass Marketing Approach			Personalized / One-On-One Approach		
Legacy Pipeline Stages	Prospects	LSJ1 - Rejecters	LSJ2 - Pre-considerers	LSJ3 - Considerers	LSJ4 - Intenders	LSJ5 - Pledgers	LSJ6 - Gift
Stage definition	Any supporter, financial or non-financial, who has the potential to be interested in making a legacy gift	Supporter has been approached for a legacy gift and has declined	I'm unsure if I would consider leaving a gift to Greenpeace in my will but I'm aware of it OR please contact me later, I'm not ready right now..	Anyone who has requested information or has indicated that they are considering leaving a legacy	Supporter has indicated they intend to leave a legacy to Greenpeace and/or is actively discussing the details with family members or professional advisors	Supporter confirmed they have left a legacy to Greenpeace	Supporter has passed away and the gift has been received or is expected OR no donation was received because estate was depleted.
KPI Definition	Total active supporters in your database that is over the age of 55 - and active supporter is defined as someone who has made a financial donation in the previous calendar year and year-to-date	Total number of supporters who have rejected the idea of leaving a legacy. <b>**Will Not Be Reported**</b>	Total number of supporters who are aware of the possibility of leaving a legacy but are unsure or aren't thinking about it	Total cumulative number of supporters who have requested information on leaving a legacy and are considering their decision.	Total number of legacy supporters entering the Will preparation stage	Total number of legacy supporters who have confirmed they have left a gift in their Will	Total number of legacy supporter who have passed away
Message to supporters	No legacy conversation yet, only general message about impact of legacy gifts Drip messaging approach	That's alright There is no pressure Thank you for your consideration	No pressure Take your time Here to answer your questions Continue to show what GP does	What can I do to help you in the decision making process I'm here to answer your questions or concerns	Thank you What can I do to help	Appreciation Ask their motivation for leaving the gift Invitation to the legacy society	Thank you/gratitude Condolences to the next of kin
What emotion we want supporters to feel?	Hope Realizing dreams Inspired	Understood Appreciated	Valued Understood Give space to reflect	Inspired Informed Reassured	Empowered Motivated Confident	Empowered Motivated Appreciated Involved with GP family Inspired	Gratitude Empathy
What do we want to say or do?	Did you know there are other ways to support Greenpeace? Others like you are leaving a gift in their will.	That's alright Thank you No pressure	Thank you Take your time and contact me if you have any questions	Thank you for considering leaving a gift in your will Take your time, we are here to help you	Demonstrate GP can be trusted to steward their legacy gift Focus on what the supporter leaves for future generations Provide info on how to find a notary in the supporter's area	Telephone party to say thanks Keep them informed Ask for a testimonial and a message for future generations	Show impact of gift Honour pledger's request
WILL WRITING: What do we want supporters to do?	Read legacy information	Nothing	Read legacy information Ask us questions	Make a decision to leave a legacy Understand how supporter's gift will be used	Go to the notary Discuss wishes with loved ones	Keep GP in their will Feel inspired and reassured	N/A
CHANNELS How could we generate / continue our conversations?	Drip feed legacy messaging in various supporter communications	Continue to drip feed legacy messaging in supporter communications Offer access to discounted notaries (if reason for refusal is financial) Offer to follow up at a later date	Send info on campaigns and impact of gifts Continue to show what GP does	Inspiring legacy web page Legacy package Telemarketing Legacy event General special event Notary event	One on one conversations Special events Legacy web page Notary events	Legacy club Special events One on one relationships Thanks annually with letter Keep them informed of GP news	Letters Cards Telephone Invite the next of kin at legacy memorial
TOOLS What tools can help support our conversations?	Newsletter articles Brochure Pamphlets Magazine Website Testimonials General special event Info stands Facebook	Newsletter Magazine	Newsletter Magazine E-blasts Website Newspaper Facebook	Sample will language Legacy package List of notaries/solicitors/attorneys Online will writing options	Sample language document Legacy package List of notaries, etc Online will writing options Personalized card (birthday, Christmas, Valentine's)	Personalized thank you call from legacy manager, or ED, or board chair Capture testimonial from the supporter Message for future generations from the supporter Recognition through events, legacy society, personalized card Newsletter Magazine	N/A