



gifted®

CASE STUDY

# The British School at Rome

How to design and deliver a  
transformational Legacy Programme

Exceptional fundraising partnerships

Legacy fundraising is something that many charities either shy away from or fail to engage with proactively. Why? In our experience, this is because the idea of talking to prospective givers about the subject of death is less appealing than other forms of fundraising. They might also feel that given the return on their investment isn't immediate, it makes more sense to focus on much lower hanging fruit. Sadly, for some UK charities, this means missing out on millions of pounds of legacy income every year.

## The legacy picture across the UK

According to analysts, Legacy Foresight, in 2022, charity income from legacy giving for the whole of the UK reached £3.85bn. And, in spite of increasing economic pressures, this is expected to remain resilient over the coming years. So much so that by 2050, the value of legacy giving, after taking inflation into account, is likely to be around £5.2 bn.

Clearly, this represents a staggering opportunity for charities of all sizes. It also highlights that when built on positive messaging and structured in the right way, legacy campaigns have the power to inspire and motivate people of all ages, not just the elderly.

## The British School at Rome

In 2016, Gifted was approached by the British School at Rome (BSR) who wanted to explore the organisation's potential for launching its first ever legacy giving programme. As a registered charity in the UK, the BSR had been used to receiving occasional bequests but had never proactively embraced legacies as part of its fundraising mix. In 2015, its legacy income stood at £110,000, all of this coming from previously unsolicited bequests.

Both the BSR's Executive Leadership and the Board of Trustees had a sense that much more could be achieved. They recognised the need to identify new legacy givers and understood the importance of developing regular giving and major gifts programmes capable of cementing a donor's relationship with the BSR.

## Essential first steps

Before they embarked on a dedicated legacy campaign, Trustees were advised to undertake a vital Feasibility Study. This essential first step, comprising a thorough review of the Charity's database, a supporter survey and around 30 face-to-face stakeholder interviews, was key to gaining a realistic picture of the BSR's landscape of support. The survey which was mailed to around 2,250 contacts, produced a fantastic 15.6% response rate, (most surveys typically rely on a response of 2-3%). This result underlined the importance of drafting a compelling case for support; one that persuasively demonstrated the impact of the BSR's work, explained the tax advantages of making a bequest and outlined the opportunities for donor recognition. It also demonstrated the engaged support base present at the BSR.

The survey was critical to identifying 33 individuals who revealed they had already made a bequest to the BSR and a further 109 potential givers who said they would be keen to know more about the proposed legacy programme.

## The 1916 Club

The Feasibility Study's findings informed an initial campaign target of £750,000 and focused on prospective givers based in the UK, Europe, Canada and Australia. The Study also identified internationally acclaimed fiction writer, Lindsey Davis as a figurehead for the Campaign and inspired the formation of the 1916 Club. Everyone who made a bequest to the campaign was automatically invited to join the 1916 Club, which reflected when the BSR was founded and encouraged members to play a distinct role in shaping its future.

"It was really important that in every communication with donors and across all campaign literature, the messaging was positive," says Amy. "We knew that the beating heart of the BSR community was all about making history. Whether through archaeology, architecture, or fine art, its community valued the idea of intertwining their own legacy with the School's as a whole, and the 1916 Club gave them exactly this kind of opportunity."

## Record-breaking success

A good legacy programme is all about building relationships. A giver may start off at the base of the 'donor pyramid', supporting key events or making an occasional gift, but with careful stewardship they begin to feel more invested in a Charity's work. This can lead to a pattern of regular giving and, over time, a decision to make the ultimate gift of a personal bequest.

A close understanding of the donor journey helped to guide the BSR's legacy fundraising strategy and pave the road to success. Delivered in two distinct phases, Private and Public, the Campaign surpassed its original target and, by March 2018, had raised an incredible £1,568,832 in legacy pledges.

After the first 14 personal approaches had been made and a success factor had been established, a launch event in London marked the start of the Public Phase of the Campaign. Attendees from the BSR's global network were invited to learn more about the School's ambitions and hear from existing legacy supporters about their decision to leave a gift to the Charity. The outcome was an inspirational, uplifting event that championed doing something now that would make a lasting difference to the future of the BSR and its mission to support creative and academic researchers from Britain and the Commonwealth.

By February 2019 the campaign total had jumped past the £2m mark and reached a record-breaking £2,485,731.

A combination of careful planning, outstanding leadership and thoughtful, face-to-face asking had resulted in an extraordinary and unimaginable level of philanthropic support. This gave the BSR confidence in its future financial security and a greater degree of control over its lifeblood, the all-important flow of unrestricted funding.

## Recognition and stewardship

Too often, we meet charities who believe that once a legacy commitment is made, the gift is in the bag and nothing more needs to be done. Not surprisingly, myths like this can be the reason why a donor begins to disengage from an organisation and even change their mind about where to leave money in their Will.

At the BSR, the goal was to guard against such mistakes, by making sure that every donor was personally thanked by the School's Director and that they received appropriate recognition through a vehicle like the 1916 Club. It also involved keeping everyone up to date with the BSR's plans, through regular communications and an annual invitation to a special 1916 Club Members' event.

All in all, the BSR's success came down to proactively engaging its community in a life-affirming legacy message – something which Gifted's Chief Executive, Amy Stevens, firmly believes in.

"Anyone who knows me, also knows that I love a legacy campaign. For me, it's about witnessing the transformation a client goes through once they really grasp the idea that legacies are intimately connected with life, rather than death, and they realise how liberating it is to engage with their donors and remove the 'taboo' of talking about legacy gifts. As a result, they often attract the most inspirational acts of philanthropy. It was an absolute privilege to watch this happen at the BSR, and to be part of helping the School make sure its own unique legacy is safe for generations to come."

Gifted Philanthropy would be delighted to have a no-obligation conversation with you about conducting a feasibility study and how we might help you to achieve your fundraising goals. Either get in touch with one of our directors or contact us via our website.

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