

Inspire. Connect. Grow.
2019 | CHICAGO, IL

#2019Raise

Raise 2020

WE'RE GOING VIRTUAL

2 Days of Online Learning & Networking

SEPTEMBER 14-15, 2020



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Global Perspectives of Legacy Giving

W E L C O M E



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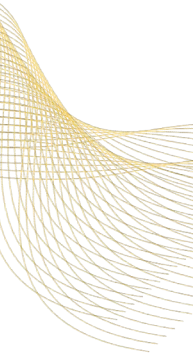
www.linkedin.com/in/ligiapena

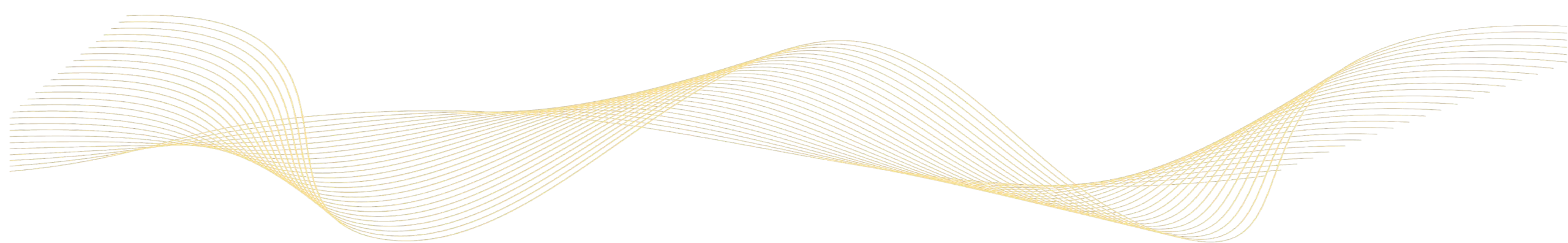
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Question?

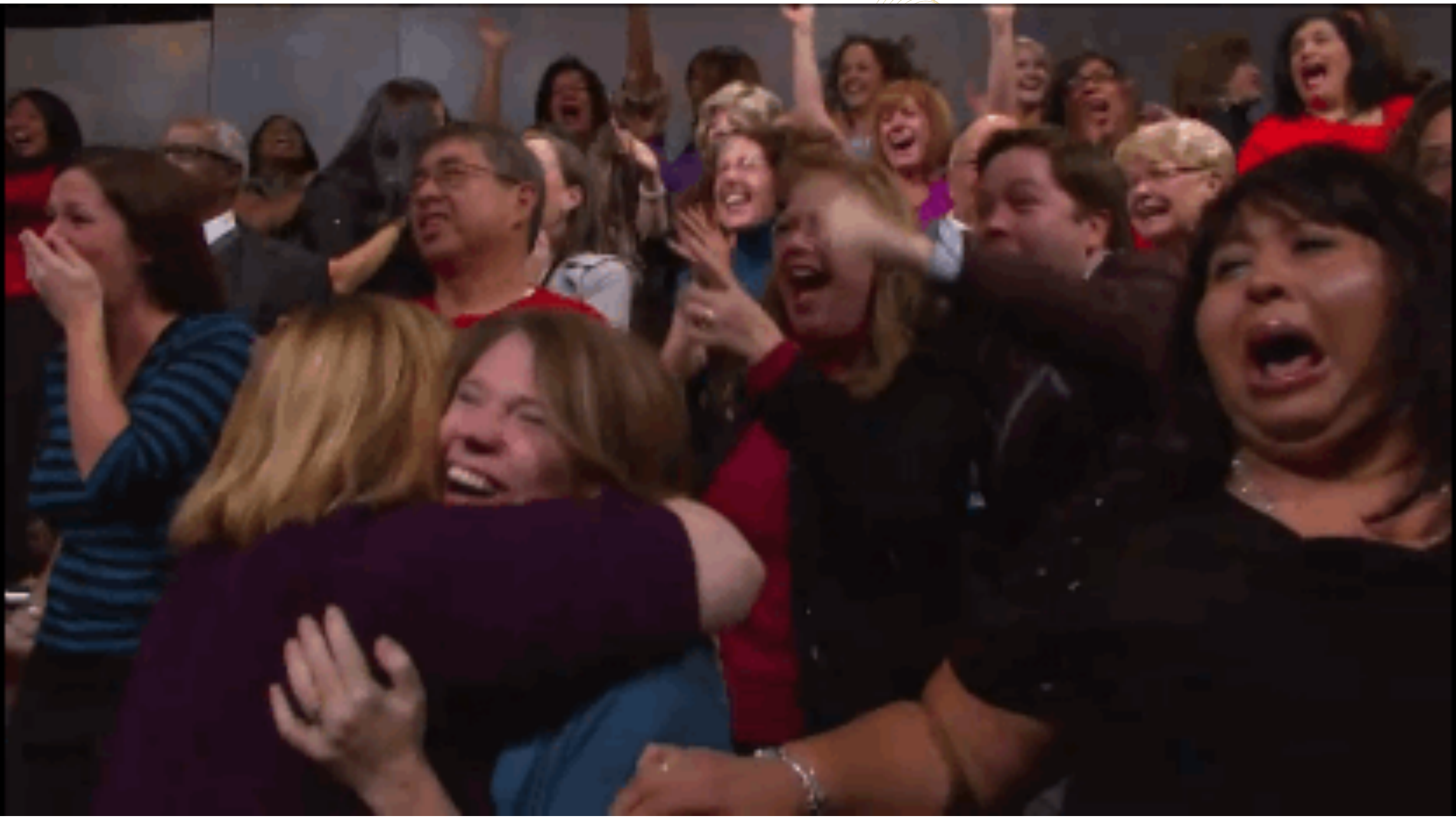
What are some of the biggest challenges or obstacles with your gift in wills program that make your head....







What if I said that by the end of the session you will have picked up a few tips from other countries so you can be more successful with your gifts in will program?





“Your Legacy Is Every Life You’ve Touched”

MAYA ANGELOU

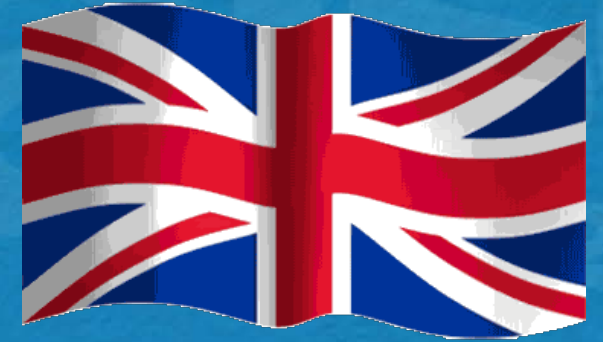
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Some Stats ...

- ✓ Why the UK, Netherlands and Japan?
- ✓ Legacy Foresight and data

Will Making by Country	Percentage of Retired People Making a Charitable Legacy
Japan = 10% Netherlands = 32% UK = 49% USA = 42%	Japan = 1% Netherlands = 4% UK = 19% USA = 5-6%

The UK



- Charity income from legacies has risen over previous years and now totals over £3 bn (2018) - climbing from 3% to 3.6%.
- Legacies account for 14% of all fundraising income.
- A 2018 survey by nfpSynergy showed that the number of Britons who claim to be unaware of legacy giving dropped from 17% in 2009 to 10% in 2018.
- Past 3 decades = good economy, increasing death rates BUT Brexit ...

The UK



- o Using social media - more specifically Facebook to acquire new legacy prospects and identify pledgers.

<https://www.facebook.com/9250349228/posts/835840319373>

The UK



- Highly normalized legacy culture thanks to a strong and successful Remember a Charity campaign (12% in 2007 to 18% in 2018).

<https://www.rememberacharity.org.uk/>

<https://youtu.be/dRzTzyHnZx4>

The UK



- o Proactive move to have advisors invite clients to leave a bequest (61% of solicitors).

<https://www.rememberacharity.org.uk/solicitors-will-writers/wills-with-charitable-beneficiaries/>

Japan



- In 2010, Japan had the 10th largest population in the world.
- Japan is one of the world's largest economies.
- Has one of the highest life expectancy rates in the world – 78.9 years for men and 85.7 years for women. The combination of people living a long life and the low birth rate means that Japan, demographically speaking, is a rapidly aging country.
- Population is shrinking. Women aren't having as many children.
- 21% of those over 40 are willing to give a bequest for social causes.

Japan

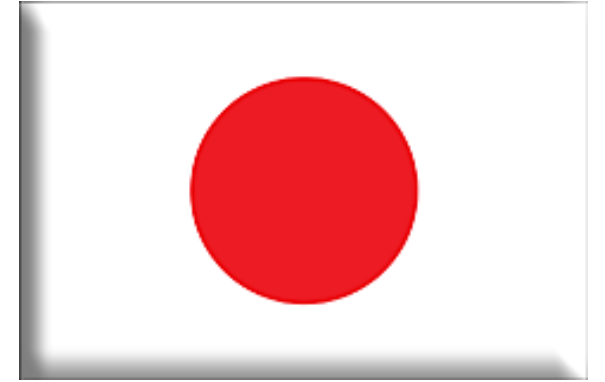


- Strong focus on the next generation, instead of peers – sense of giving and looking after other – strong cultural significance.
- Use of DRTV.

http://act-greenpeace.jp/donate/legacy/?utm_campaign=Others&utm_source=GPwebsite&utm_medium=banner&utm_term=legacy_sidebanner&ga=2.156800187.1811909206.1523413309-2017540172.1469541402



Japan



- National Legacy Gift Association – started in 2016 to answer calls from donors on how to leave a legacy (loosely designed after Remember a Charity in the UK).
- By 2017, they had answered 1,400 calls.
- Clean slate – emerging market allows organizations to innovate and do thing differently.

<https://izoukifu.jp/>

The Netherlands



- Legacy income is 20% of individual giving, but legacies are left by only 5% of those who die.
- 40% of the 50+ questioned said “I have not made a will, and do not think I will”. Legal protection for the family ≠ no need to write a will. The perceived high cost is also a barrier.

The Netherlands



- Boomers much more open to the idea of leaving a charitable gift than the older generation: 25% versus 14% of war babies. Given the size and wealth of the Dutch baby boomer population, this is a positive indication for future charity legacies.
- Heavy use of DRTV, especially for national marketing campaign

<https://toegift.nl/>

The Netherlands



- Multichannel approach to acquisition and supporter engagement
 - Direct mail
 - Telefundraising
 - Face to face
 - Social media (direct and adverts)
- Use of older individuals to conduct telemarketing calls.



WAIT FOR IT

Bonus Round

- Greenpeace Australia Pacific – use of life story writing and legacy questions in brand awareness survey.
- Swedish legacy campaign – two-pronged approach between young and older prospective.
- Europe in general (Asia is starting) – leverage digital for acquisition and engagement.



Let's Get Social!

Contact Me

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A woman with dark hair, wearing a black headset with a microphone, is looking at a laptop screen. She is wearing a dark blue shirt with white polka dots. Her hands are raised in a gesture, palms facing forward. The background is a blurred office setting with bookshelves. The image is overlaid with a blue diagonal shape on the left side, which contains text and a logo. In the top left corner of the blue shape, there are several thin, yellow, wavy lines that look like a stylized signal or sound wave.

QUESTIONS?

Now's my time to
hear from you!

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TRY IT OUT!

Interactive Activity

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Don't forget to rate each session!

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