

STRATEGIC PRIORITIES

2019-2021

**REMEMBER A CHARITY
IN YOUR WILL**
Help the work live on...

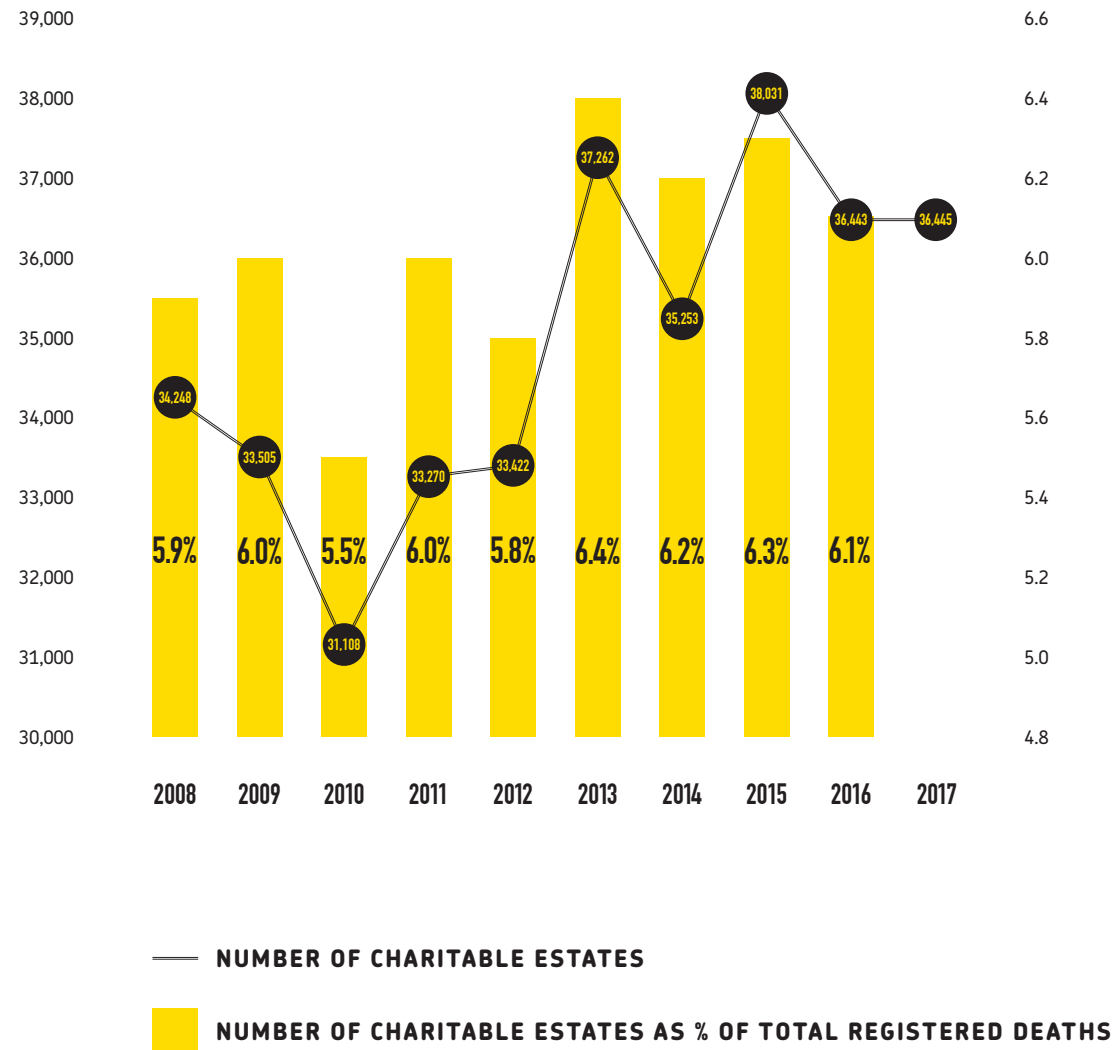
OUR ROLE

Remember A Charity is a behaviour change campaign, aiming to grow the legacy market by doing what no single charity can do on its own.

Our long-term strategic role is to grow the legacy market, encouraging and inspiring donors to leave a gift in their Will by:

- 1 Driving the public's consideration and action about gifts in Wills.
- 2 Ensuring professional advisors consistently mention the charitable option when advising clients.
- 3 Creating a more favourable environment for charitable Will-writing.

HISTORIC TRENDS IN NUMBER OF CHARITABLE ESTATES



GROWING THE LEGACY MARKET

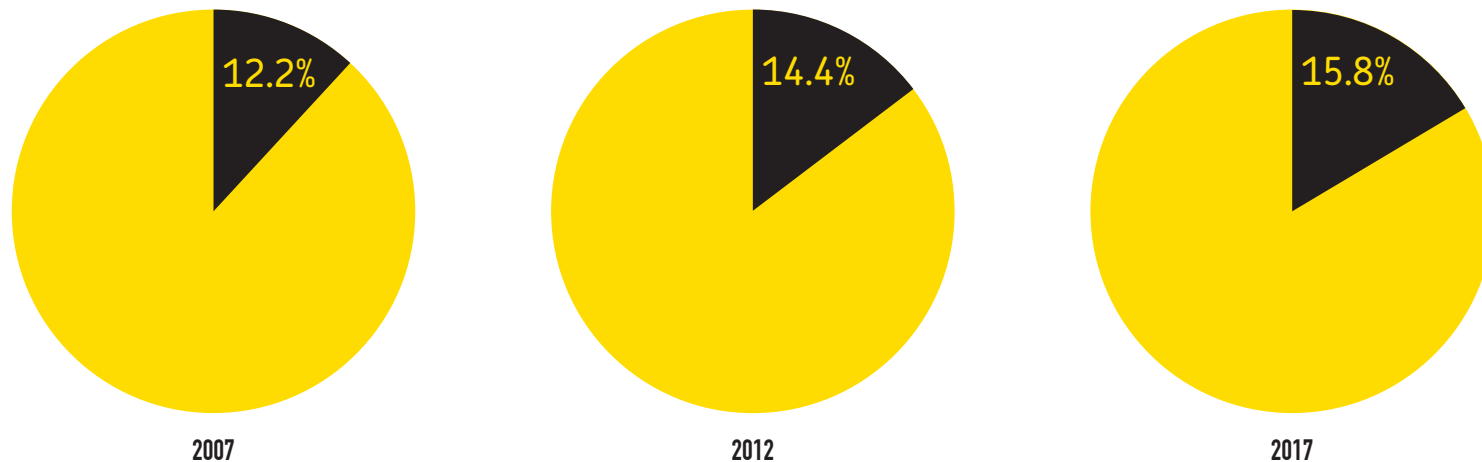
Latest figures show that the legacy market continues to grow, which is testament to the collaborative work by the sector and the generosity of the British public. 15.8% of Wills that went to probate included a charitable gift in 2017, up from 14.4% in 2012 and 12.2% in 2007. The number of charitable estates also continues to rise, despite the number of deaths-per-year falling for the past three decades. However, this downward trend has reversed in the past two years, with the number expected to reach 700,000 a year by the mid-2030s.

This shift will lead to the largest-ever cohort of British people writing their Wills, providing an opportunity for donors to make a positive difference to the causes they care about. This shift, however, is set against a backdrop of significant external pressures for legacy giving in the short term, including the uncertainty of Brexit, stagnating house prices and rising student debt.

Charity market share is also being squeezed. Since 2012, more than 26,000 charities have been named in Wills, with 3,000 named for the first time in 2017 - creating even greater need to continue to grow the legacy market.

Remember A Charity will continue to monitor legacy giving rates by tracking the percentage of charitable estates at probate.

We will also monitor current Will-writing behaviour. This will include our annual consumer tracking survey, monitoring solicitors' attitudes to legacy giving and market segmentation data at key life stages such as retirement planning.



 % OF WILLS THAT WENT TO PROBATE THAT INCLUDED A CHARITABLE GIFT

OUR STRATEGY

Our research shows that 35% of the UK say they'd be happy to include a gift in their Will, once they have taken care of family and friends. Our long-term aim is to bridge this disconnect with current giving behaviour.

We remain on track to achieve our long-term goal for the percentage of charitable estates at probate to reach 18% by end of 2021. We will do this by continuing to focus on the following three strategic priorities:

- 1 Normalising charitable Will-writing at key life stages.
- 2 Ensuring professional advisors consistently mention the charitable option when advising clients.
- 3 Developing strategic partnerships to help drive behaviour change.

NORMALISING CHARITABLE WILL-WRITING AT KEY LIFE STAGES

1

We have continued to track the public's attitudes towards legacy giving, focusing on our core audience of ABC1 55+. The long-term trends reveal a steady increase in those who claim to be aware of legacy giving.

Conversely, those who claim to be unaware has fallen from 17% in 2009 to 10% in 2018.

Our strategy will therefore seek to address the current disconnect among those who are aware of legacy giving and those considering it.

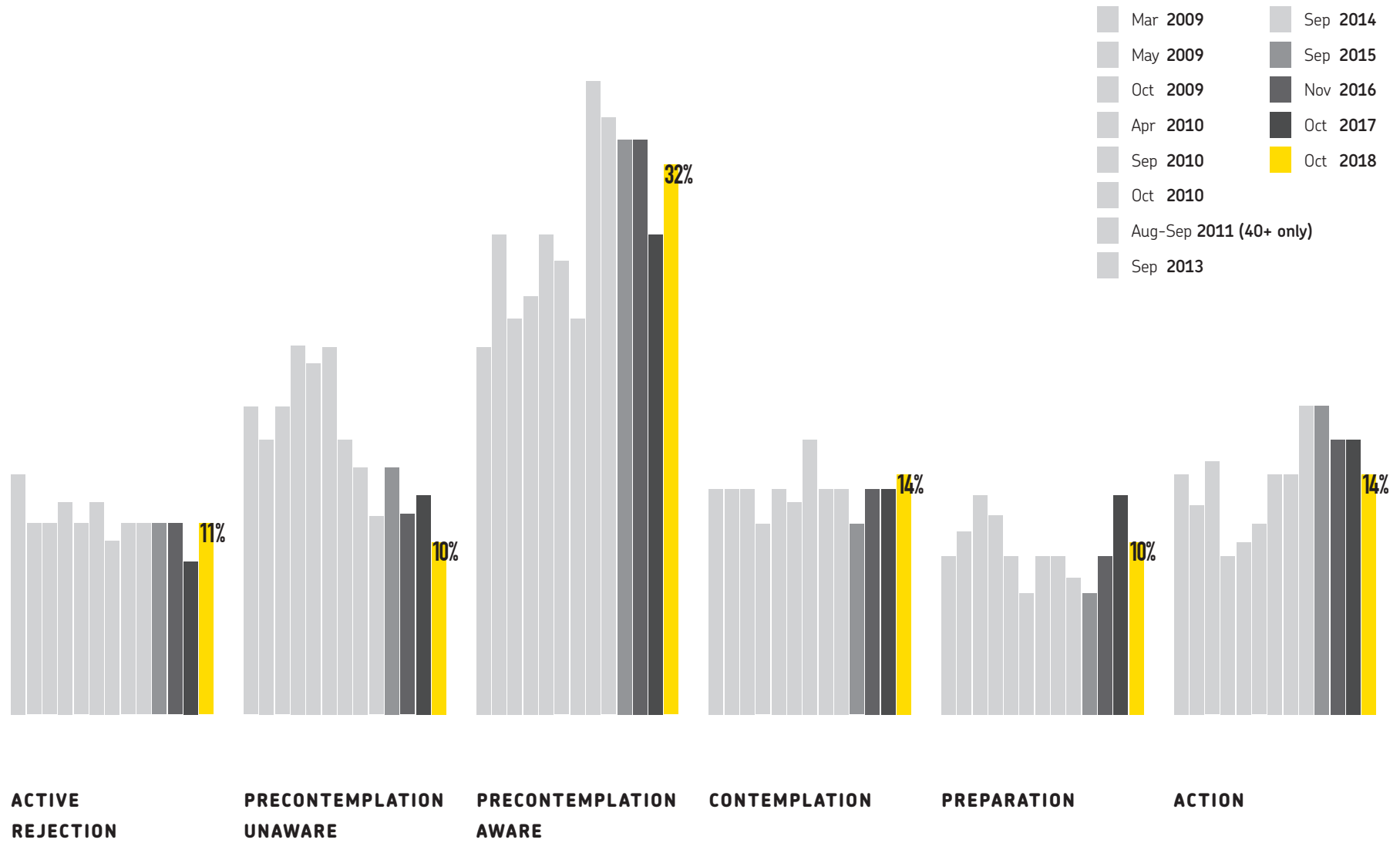
As part of this strategy, we will target ABC1 55+ who are pension and retirement planning – informing and inspiring them with relevant, timely and trustworthy content on leaving a charitable gift.

In Year 1 we will identify the customer journey on pension and retirement planning, in relation to Will-writing.

In Year 2 and 3 we will deliver our plan to build on these insights and drive charitable giving consideration at these key life stage triggers.

Our key metric will be our annual Stages of Change survey, which will also monitor the public's attitudes to identified key barriers to legacy giving – such as misconceptions around the size of gift and supporting family, friends and charity.

STAGES OF CHANGE



ENSURING A CONSISTENT APPROACH AMONG PROFESSIONAL ADVISORS AND KEY DECISION-MAKERS

We will focus on the following areas to help drive a consistent approach to legacy giving conversations among professional advisors.

In Year 1 of our strategy we will build strong relationships with external bodies such as ILM and STEP to identify new ways of working, and build a business case for further fiscal incentives around legacy giving.

In Year 2 and 3 we will seek to roll out the CPD training and present a robust case on fiscal incentives to key influencers.

Our key metric will be our annual Future Thinking benchmark survey, measuring prompting levels among solicitors and Will-writers.

A Tax incentives to help drive conversation about charitable giving

- 1 Lobbying Office for Tax Simplification to retain IHT 36% rate.
- 2 VAT incentive.
- 3 Probate fees.

B Closer collaboration with ILM to ensure a better relationship with the legal sector and a consistent external voice.

C Working with The Law Society / STEP / IPW to support:

- 1 CPD training on how to raise the option about gifts in Wills.
- 2 Remember A Charity's Campaign Supporter scheme for solicitors and Will-writing professionals, growing the number of advisors who actively promote charitable giving.

D Influencing key decision-makers including Government and the Law Commission who have the capacity to change the Will-writing environment in the UK.

STRATEGIC PARTNERSHIPS TO DRIVE BEHAVIOUR CHANGE

We will identify and develop strategic partnerships that help drive behaviour change. A key focus will be partners from the Will-writing sector and legal sector influencers.

In Year 1 of our three-year strategy we will undertake research to identify the best potential partners to reach our core audiences and deliver change.

In Year 2 and Year 3 we will cultivate and develop these partners, focusing on activities that no single charity could achieve on its own.

MEMBERSHIP

Remember A Charity has grown from 140 charities to more than 200 during the past four years.

Our campaign is solely funded by our membership. We are committed to continuing to represent the sector by ensuring that we have a diverse and inclusive membership.

We are also committed to supporting our members, giving them the tools and platform to grow their legacy giving through campaigns such as our annual Remember A Charity Week.

To ensure we continue to understand the needs of our members and their role within the campaign, we will:

- i Review our member offer, including Remember A Charity Week, reframing it as part of our new strategy.
- ii Identify our members' role to help normalise gifts in Wills.
- iii Continue to attract and retain members across all bands, growing our reach within the fundraising community. We will count not only the number of our members, but also the number of people engaging with our campaign.
- iv Monitor members' satisfaction by launching a Net Promoter Score, aiming to increase it year on year.

**REMEMBER A CHARITY HAS GROWN
FROM 140 CHARITIES TO MORE THAN
200 DURING THE PAST FOUR YEARS.**

3

“ Together with our member charities, we aim to do what no single charity can do alone – making gifts in Wills a social norm ”

The graphic consists of three overlapping yellow circles arranged horizontally. The text is centered within the overlapping area of the circles.

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Remember A Charity is part of the Institute of Fundraising, a registered charity in England and Wales [No. 1079573] and in Scotland [No. SC038971]